

Safe Foods' Solution to Sales and Field Service Needs is Salesforce



The growth of Safe Foods' sales team prompted them to re-evaluate their free CRM solution, vTiger. During this evaluation period, they realized they needed a more complex system to accommodate the CRM fields they wanted to utilize that they weren't able to with vTiger.

Safe Foods needed a new solution that was as committed to their business model as they were. As a major food safety solutions provider, their big picture goal is to always ensure a safer food supply for the world by offering a unique combination of knowledge, service, and solutions.

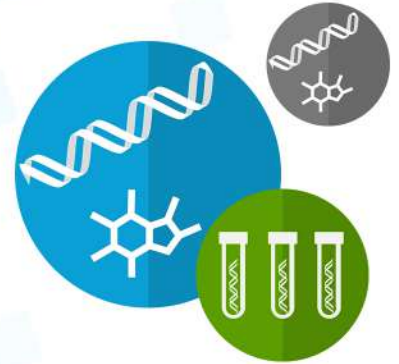
With their challenges, goals, and values in mind, Lawson Hembree, Strategic Marketing Manager at Safe Foods, and his team, evaluated several new solutions. If the system did not offer a direct ERP integration, they steered away. More than anything, they required a system that would evolve alongside them as a company.

Safe Foods put together two internal teams from their field service and sales departments to evaluate potential options before selecting a solution. Hembree and his team considered and assessed the top two solutions on the market today: Salesforce and Microsoft Dynamics 365. Since Ledgeview is a certified solutions consultant of both, it was an easy choice for Safe Foods to consult the company for its CRM project needs – present and ongoing.

The teams came to a consensus after deep evaluation that Salesforce was their best fit for its comprehensive field service and sales capabilities, and Ledgeview agreed after conducting their own analysis.

"We appreciated the balanced perspective Ledgeview had on Salesforce and Microsoft Dynamics 365," Hembree says. "We needed our CRM to be able to handle both sales and field service, which significantly narrowed our choices because many solutions do not offer both."

Ledgeview's wide range of expertise and resources sealed the deal with Safe Foods on their collaboration. Together in partnership with Ledgeview and Salesforce, Safe Foods was poised to transform their sales and field service operations to create more effective outcomes.



"We needed something that could be adapted to fit our sales process, as we have a unique and customized procedure," Hembree says. "But we also needed something that could handle the needs of our field service and sales teams. It's a crucial part of our business model and customer satisfaction."

By putting together a design requirements document for Ledgeview, Safe Foods was assured up front that their problems were clear and unpacked. Ledgeview helped them go through the document and prioritize needs to ensure a smooth rollout.

"Salesforce was vital in helping us meet our goals," Hembree says. "And Ledgeview did a great job in helping to make our vision a reality."

During the Salesforce implementation process, the regular meetings between Safe Foods and Ledgeview were crucial. A thorough work scope allowed for process clarity and sensible adjustments. The project cadence was on-pace.

"Ledgeview accommodated all levels of technological comfort during the implementation process," Hembree says. "We didn't spend more than we had to on this project, and everything was on time. It was refreshing to stay within budget with Ledgeview."

Ledgeview Partners designed, configured, implemented, and trained 30 service technicians at Safe Foods on Salesforce Field Service.

The benefits of the partnership expanded as Safe Foods' technological journey progressed.

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 THE
BENEFITS

Safe Foods is leveraging Salesforce Field Service to plan, prioritize, execute, report, and measure all preventative maintenance of equipment and break/fix requests. With Salesforce, the team can keep track of all installed assets at each plant location.

Safe Foods utilizes customized reports and dashboards to fit their unique sales process and evaluate sales team performance.

“Our sales process is the capstone of our sales team’s success,” Hembree says. “The right CRM was the last piece of the puzzle. With Salesforce, we can start measuring things that matter and provide feedback to the team that isn’t just guesses, things like win-loss ratios and sales cycle tracking will be especially helpful.”

Hembree and his team envision a long relationship with Salesforce and Ledgeview’s Support team. They have already moved forward with next steps, electing a Salesforce Owner, Julia Reed, Sales Analyst at Safe Foods, to keep their system alive and forward-moving.

“From the account manager standpoint, we have more comprehensive reporting tools that our teams can access to communicate more effectively and improve,” Reed says. “There’s a lot of potential as we go forward.”

Hembree and Reed agree that communication has improved between their field service and sales departments as a result of their Salesforce implementation. Many of their team members operate across the country, so Salesforce helps them to be more reactive and connected than ever before.

They recommend Salesforce and Ledgeview to their industry peers, attesting to the companies’ multi-faceted value.

“We are very happy with our Ledgeview experience so far,” Hembree says. “Ledgeview has many of the same core values as we do, like putting the customer first. Their customer-centric focus has been an added bonus throughout the process.”

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LAWSON HEMBREE


 ABOUT THE
COMPANY

Safe Foods exists to ensure a safer food supply for the world. Safe Foods is a global leader in food safety knowledge, services, and solutions, serving clients across the United States and in eleven countries.

The company’s history of innovation has led to many new food safety technologies that make food safer for consumers.

For more information, visit www.safefoods.net.