



## Ledgeview's Out-of-the-Box CRM for Oil & Gas Product Proves to be a Seamless Solution for Northern Energy

### THE SITUATION

Northern Energy Inc. is a senior-level elite distributor for Chevron, an American multinational energy corporation. As a lubrication distributor and marketer for Chevron Lubricants, Northern Energy supplies oils, greases, antifreeze, etc. to all of Michigan and parts of Ohio and Indiana.

One of the requirements for lubricant marketers that are a part of Chevron Project Transform is to have a CRM system.

When Chevron bought Texaco in the world's fourth-largest oil merger for billions of dollars in the early 2000s, they took all of Texaco's distributors and lubricant marketers to create a new program, fittingly titled, Chevron Project Transform.

Requiring its lubricant marketers to implement a CRM to advance the business forward was a part of this major industry shift.

Robert Holland, I.T. Manager at Northern Energy Inc. says being a part of the program made it easy to evaluate and implement a CRM solution.

Under Chevron's program guidance and encouragement, the team at Northern Energy evaluated several different market-leading CRM solutions and arrived on Ledgeview's industry-tailored CRM for Oil & Gas product, powered by Microsoft Dynamics 365, for a few key reasons.



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### THE SOLUTION

Holland and his team ultimately picked Ledgeview's CRM for Oil & Gas product because it was ready out-of-the-box, and would not require massive "after-the-fact" programming that other solutions might need, saving the company money in the long run.

"The tool worked almost from day one once we got the procedures loaded into it, and it did not require many post-programming functions," Holland says.

In comparing other CRM solutions, nothing else measured up out-of-the-box for the team at Northern Energy.

**"From start to finish, the Ledgeview program is well-packaged,"**

Holland says.

"From the teleconferences that we had, to the visits from our Ledgeview product specialist, and the processes and timelines that had to be met in order to get this to work, it was great! I've recommended Ledgeview to others because of this. It's really a 'walk your way through it' program."

Even before the product was implemented, Holland says Northern Energy received support from their Ledgeview product specialist and the CRM development team that was "extremely helpful" in their technology journey.

"There were things like QuickBooks that we had to integrate with CRM for Oil & Gas, and we were able to negotiate a contract where Ledgeview did the programming," Holland says. "It was pretty seamless!"

Like with any new technology implementation, Holland anticipated hurdles, but Ledgeview helped smooth things over.





THE  
BENEFITS

“There is always pushback,” Holland says. “It took a while to get over that, but once you get through it, CRM is now second-nature. It’s now a tool that’s inherently part of the company. You can’t skirt it, or else you don’t have the data.”

“In working with the Oil & Gas solution, one of the bigger values is that it’s made our data visual and when you can set up your screen to open to show your key metrics out of the gate, that makes a big difference,” Holland says.

Growth for Northern Energy has been market-driven. In today’s pandemic times, Holland and his team are grateful to keep moving forward, noting that CRM plays a role in business sustainability.

Reflecting on the benefits that CRM and Oil & Gas has given Northern Energy, Holland echoes the importance of it being ready for the industry “out-of-the-box.”

“How well-implemented it [CRM for Oil & Gas] can be to get it moving has been a big plus,” Holland says. “It allows us to look at our opportunities, gets them in the system, and keeps them in front of everyone at all times. We don’t rely on people’s memories, and things don’t fall through the cracks.”

**“What we use in CRM for Oil & Gas, we use wholeheartedly,”**  
Holland says.

“Keeping the opportunities in front of our salespeople keeps everything fresh. If something dies, you get rid of it in CRM. It’s pretty intuitive.”

Northern Energy credits Ledgeview’s CRM Support Staff for being “extremely helpful.”

“The team always gets back to me as soon as they can if they aren’t immediately available, and they usually are,” Holland says. “They are very helpful in trying to find additional ways of doing things in CRM.”

Holland says for anyone in the industry who is looking at CRM, the best thing they can do is to “look at Ledgeview.”

While the upfront costs of a technology investment may be jarring to Oil & Gas businesses exploring it for the first time, Holland attests that with Ledgeview, the long-term investment is the best financial value.

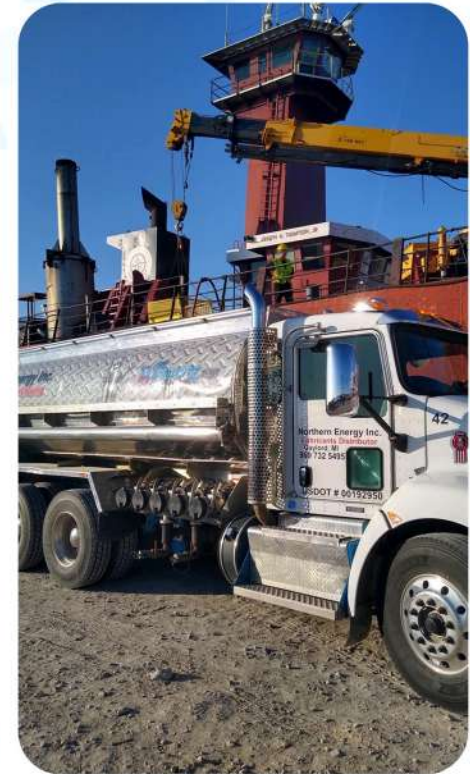
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## ABOUT THE COMPANY

### *In their own words...*

Having served all of Northern Michigan for more than 40 years, we have learned that you, our customers, are the reason for our success! We proudly provide you with unmatched service along with a full line of Industrial and Commercial Lubricants from the industry’s leading supplier Chevron. Northern Energy, Inc. is a “Certified” 1st Source Elite Chevron Lubrication Marketer. This rigorous certification process was introduced to ensure that all of our customers’ needs are being met through a higher standard of Lubrication Marketers that must meet minimum inventory levels and certified training programs.

Learn more about Northern Energy at [northern-energy.com](http://northern-energy.com).