



Valley Pacific Petroleum Improves Customer Intelligence with Ledgeview's Industry-Tailored CRM for Oil and Gas Product

**Image Courtesy of Valley Pacific Petroleum.*



Years ago, Valley Pacific Petroleum Services chose Salesforce.com as their business and technology solution due to the fact that it was largely supported by Project Transform, a Chevron-led industry initiative to enable digital transformation among jobbers.

“We went through the Project Transform initiative as requested by Chevron,” said Geoff Howard, Fuels Marketing Manager at Valley Pacific Petroleum. “And Salesforce seemed to be a solution they (Chevron) were split 50/50 on with Microsoft Dynamics. We leaned towards Salesforce with the more robust offering to start as there’s a lot of flash there.”

As Valley Pacific implemented and adopted Salesforce, they were struggling to gain high and continuous user adoption. Howard reports the main struggle was the lack of buy-in from key stakeholders.

“Key decision-makers at our company didn’t have buy-in on Salesforce,” Howard says. “If you don’t have buy-in from the top-down, user adoption is very difficult to implement.”

In addition, the robustness of Salesforce proved to be a double-edged sword for Valley Pacific due to its complexities. “Our decision to change solutions escalated,” Howard says.

From discussion with other jobbers and continued marketing efforts, they continued to hear about Ledgeview’s plug-and-play solution tailored to the Oil and Gas industry. After thorough evaluation of other top vendors, they made the decision to move to Ledgeview’s CRM for Oil and Gas product powered by Microsoft Dynamics 365 to solve their ongoing challenges.



“Ledgeview’s CRM for Oil and Gas platform met our specific needs and was used by respected counterparts in the industry,” Howard says.

The product’s notable industry reputation helped Howard and team feel assured they were making the right decision for their team in moving solutions.

Howard says Ledgeview’s CRM for Oil and Gas product piqued his interest with its ability to provide customer intelligence, opportunity and pipeline management, and sales growth.

“We needed a viable solution,” Howard says. “Ledgeview’s product was a good fit for us because it’s tailored to our industry and respected within it. We needed and wanted a CRM that was usable for managers, owners, and users.”

Howard says Ledgeview’s demos and user group webinars, which provide insight and information into how the product functions and benefits lubricant marketers across the nation, solidified comfort in the decision.

“Salesforce services thousands of companies around the world, but not many in our industry,” Howard says. “This caused a communication barrier, whereas Ledgeview’s tool was plug-and-play.”

Ledgeview Partners provided Valley Pacific with a clear view into their sales pipeline, the ability to identify needs, and ongoing support. Even better, there was clear and decisive buy-in from the key decision-makers at Valley Pacific when the decision was made to go with CRM for Oil and Gas.

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“Ledgeview helped us determine our problems and showed us how they would be addressed during project phases,” Howard says. “They did a great job with project management.”

Howard notes there is an additional focus on results among his users and sales managers with Ledgeview’s CRM for Oil and Gas product due to clear visibility into the sales pipeline. They can more effectively win and close opportunities.

“With Ledgeview, our customer intelligence has been improved,” Howard says. “Note-taking capabilities are helping to transform our operations and culture. Our sales manager was initially comfortable with the technology, which ensured buy-in from the top-down and made all the difference.”

As Valley Pacific moves into new phases of their CRM journey, Howard says they will take advantage of the newly-released CRM for Oil and Gas Mobile App. This will allow them to update notes on the move and continue to enhance their customer intelligence.

When asked what advice he would give to his industry peers who are considering working in a CRM system for the first time, Howard stressed the importance of having buy-in from key decision-makers.

“If you’re going to do CRM, you need your owners and top managers to be on board ...so be sure to make them a part of the decision process,” Howard says. “If you get buy-in from the top level, everything will be much smoother, and you’ll be able to achieve the results you’re looking for.”

He affirms Ledgeview exceeds these CRM standards for success.

“Ledgeview’s CRM for Oil and Gas product is tailored to our industry. It has solutions and reports that you either use and know you need or don’t know you need, yet, but when you discover them, you’ll just say: ‘Wow, I needed that’,” Howard says. “Ledgeview is insightful, task-oriented, experienced, and helpful. They make sure you get your work done. They are experienced and have been developing this platform for many years with our industry counterparts to help you succeed.”

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ABOUT THE COMPANY

In their own words ...

With our 70 years of association with Chevron, Valley Pacific (VPPS) employs about 250 individuals including supply/distribution personnel, sales representatives, accounting/administrative specialists and convenience store staff. Its headquarters is in Stockton, with other offices in Bakersfield, Fresno, King City, Lodi, Porterville, Salinas, Santa Maria, and Visalia.

VPPS has hundreds of thousands of gallons of bulk lubricant storage: nearly all Chevron-branded. We operate service stations with convenience stores and supply over 150 Chevron, Texaco, “76”, Patriot, Valero and Spirit – branded dealers. We’re also a member of the CFN cardlock network, operating 42 cardlock fueling sites.

We’ve identified five distinct groups of stakeholders who depend on Valley Pacific. Satisfying them drives our governing values:

- **Shareholders:** “Earn a fair profit.”
- **Employees:** “Work hard, work smart, be safe & have fun.”
- **Customers:** “Safe, clean, dependable, friendly; No Surprises/No Disappointments.”
- **Vendors:** “Expect the best.”
- **Community:** “Obey the law & be a good neighbor.”