

## Modern Woodmen Upgrades to Microsoft Dynamics 365 On-Premises to Improve Member Relationships and Stay Ahead of the Technological Curve with Ledgeview Partners

### THE SITUATION

At the time Modern Woodmen decided to upgrade to Microsoft Dynamics 365 8.2 On-premises from Microsoft Dynamics CRM 2011 On-premises, they wanted to move out of their self-described “maintenance mode” and prevent themselves from falling behind with any future upgrades.

The team was struggling to upgrade their Office 365 applications as a result of their current CRM environment suffering from breaking. With an upgrade, they wanted to be able to utilize new functionality and resources to keep themselves moving forward with their business objectives. Modern Woodmen was also looking to migrate away from Scribe into Kingswaysoft to give them more flexibility with integrations during this upgrade period.

Finally, they planned to roll out new laptops to their 1,400 users, which solidified a foundation for a complete business transformation.

Modern Woodmen leaned on Ledgeview for help with their transition after establishing a business partnership of trust and collaboration with the firm’s experts.

When Modern Woodmen got to Ledgeview, they were looking for a partner to help them with all of their desired changes today and in the future. They needed a partner that could have open communication, ability to problem solve and really dive into a solution.

Ledgeview was a great fit for their business and culture values, making them a truly dynamic partner.

*\*Image Courtesy of Modern Woodmen.*

### THE SOLUTION

“Our goal was to have a partner who could continue to provide support past the original project goal, and we found excellent support in Ledgeview,” says Lisa Hamerlinck, Marketing Technologies Manager at Modern Woodmen.

One of the most unique features of the project was the phased rollout, in which Ledgeview provided temporary integrations to keep Modern Woodmen’s old and new CRM systems aligned while migrating users over a set period of time to make sure it was functioning as needed.

Due to a large number of users, this required a lot of testing. Modern Woodmen was collaborative during this time period, requesting recordings on specific topics from Ledgeview to be able to use for future CRM user training. Achieving high and continuous user adoption was not far in the rearview mirror for the teams.

The initial project upgrade goals were to help Modern Woodmen move their forms over to a new system, and ensure everything was up and working. Through meeting these goals, the team was provided confidence from Ledgeview, knowing their servers were secure and performing as they should, and users were at ease.

Ledgeview’s positive attitude towards providing holistic Microsoft Dynamics 365 solutions was a “big sell” for the team at Modern Woodmen.

**“Ledgeview’s price point is fair,” Hamerlinck says. “They’re the Cadillac of CRM partners at a better price point. They offer premium resources without the premium price.”**

To the team at Modern Woodmen, they have not only valued Ledgeview as a partner to assist with their upgrade but are inspired to continue to better their system as the technology evolves.

THE BENEFITS

“We have better options as far as features and functionality that we can now give to our field force,” Hamerlinck says.

User adoption is at the top of Hamerlinck’s mind in her management role. She unfurls this high value onto her team members with the help of Ledgeview’s ongoing support.

“Ledgeview helps ensure features like Advanced Find are there to help our users excel with their day-to-day marketing efforts,” Hamerlinck says. “They ensure the system is streamlined and responsive as much as possible.”

Hamerlinck explains that upgrading to Microsoft Dynamics 365 8.2 On-premises will set them up to enhance their business relationships with their members.

“The capabilities offered in the upgrade will help us drive more face-to-face visits with our members. The data mining and advanced finds capabilities help us get in front of the right people at the right time when they need it to help drive value down to the member,” Hamerlinck says.

Reflecting on her favorite functionality of the system upgrade, she cites the expansive roll-up and mapping features, many of which came out-of-the-box with Microsoft Dynamics 365 8.2 On-premises, unlike with their former system.

“The usability, the way the forms have been reformatted to be synced better, and the new layout are some of the features I love about the system that make it so user-friendly,” Hamerlinck says.

When asked what advice she’d give to others considering upgrading to Microsoft Dynamics 365 8.2 On-premises, she simply answered, “do it.”

**“If you have the time and the resources, call Ledgeview, and they’ll help you,” Hamerlinck says. “It’s so easy to get behind, but if you have a partner like Ledgeview who is waiting in the wings to help you, you’re in a good place.”**

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ABOUT THE COMPANY

Modern Woodmen of America was founded in 1883 as a fraternal benefit society. The organization supports members, families and communities with a unique blend of financial services, fraternal benefits and local-impact opportunities. In 2018, Modern Woodmen and its members provided \$19.9 million and 470,000 volunteer hours to support fraternal activities and programs.

Learn more at [www.modernwoodmen.org](http://www.modernwoodmen.org).

