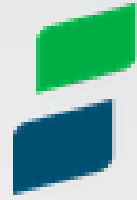


FORVISTM

Salesforce Success Stories with Legacy Ledgeview Partners (acquired in 2022)



SAFE FOODS



SAFE FOODS™
KNOWLEDGE | SERVICE | SOLUTIONS

CELEBRATING **20** YEARS

Industry: Biotechnology
Service: Salesforce

Safe Foods was struggling to find a CRM solution that would accommodate the fields they desired to have as part of their unique sales process. Out of a CRM solution, they were looking for the “missing puzzle piece” that would enhance and evolve with their field service operations and unique sales processes. After developing two internal teams that carefully analyzed the leading solutions on the marketplace today, and coordinating with Ledgeview, they knew Salesforce was the best fit.



“Salesforce was vital in helping us meet our goals, and Ledgeview did a great job in helping to make our vision a reality.”

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- Lawson Hembree, Strategic Marketing Manager at Safe Foods

PARTS TOWN

Industry: Distribution
Service: Salesforce

Parts Town had a clear objective during the technology evaluation process: to find a better way to manage client emails, responding to them more proactively and tracking all touchpoints. While the decision to implement Salesforce was easy, finding a partner came in a few phases, but when they discovered Ledgeview, they knew they found a partner they could rely on to provide quality solutions and support.



“I was overly impressed that Ledgeview didn’t just hear I had a problem, but responded to my problems right away, and provided better solutions that addressed our long-term needs.”

- Patti Pagano, Salesforce Administrator at Parts Town

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KRAUSE FINANCIAL SERVICES

Industry: Financial Services

Service: Salesforce

A leading provider of specialized insurance products for elder law attorneys, Krause Financial Services partnered with Ledgeview to create a single, streamlined Salesforce system that would give them a 360-degree view of their business. With Ledgeview and Salesforce, they developed deeper, more valuable relationships with new and existing customers.



**“We found Ledgeview Partners and reached out to them.
We loved their consultative approach and focus on customization.”**

- Tom Krause, Krause Financial Services VP of Operations

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VITALWARE

Industry: Healthcare
Service: Salesforce

As a leading provider of cloud-based technologies that help healthcare providers maintain accuracy and continuity in their documentation, coding, and billing data, VitalWare was looking for a CRM solution in Ledgeview that would help them increase organizational efficiency, access to customer data, and collaboration across departments.



“It went flawlessly. In fact, even with an aggressive timeline, Ledgeview Partners was able to guide VitalWare through installation and configuration faster than planned, completing the transition a month and a half ahead of schedule.”

- VitalWare

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PREVENTIONGENETICS

Industry: Healthcare

Service: Salesforce

Lack of compatibility with CRM integrations forced PreventionGenetics to reevaluate their current CRM solution. Users were becoming frustrated, and, as a result, the company was losing adoption. After connecting with Ledgeview and implementing Salesforce, PreventionGenetics has noticed significant increases in day-to-day efficiencies and overall user adoption.



“Utilization has significantly increased since we implemented Salesforce. And having that increased utilization is going to help us with our future sales and marketing efforts and make them more efficient. We’re really picking up the pace with Salesforce.”

- Rachel Reed, Marketing Manager at PreventionGenetics

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DENTAL CRAFTERS

Industry: Healthcare

Service: Salesforce

Before approaching Ledgeview Partners, Dental Crafters had a clear vision for a CRM Solution for Dental Crafters' network of companies. Being new to the CRM game, they wanted to talk with a rep about their options and what solution would best fit their needs. Mostly, they wanted to overcome their ERP integration hurdles, and Ledgeview helped them do that and more.



“Having Ledgeview as partners through our CRM and Marketing Automation implementation was reassuring. It helped with our confidence. We knew Ledgeview was a phone call away.”

- Andrew Wilkins, General Manager at Dental Crafters

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ST. NORBERT COLLEGE



Industry: Higher Education
Service: Salesforce

St. Norbert College partnered with Ledgeview to build a top-notch online enrollment application process for their new MBA program, connected to Salesforce. Ledgeview implemented automation to help make the process as efficient and effective as possible for managing prospects, inquiries, and applicants to the program.



“Every contact that I had with Ledgeview was very positive. Everyone across the board was very friendly and responsive. You couldn’t ask for better customer service.”

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- St. Norbert College

DOT FOODS

Industry: Manufacturing
Service: Salesforce

DOT Foods found a CRM Solution in Ledgeview, which helped them consolidate customer data, streamline sales processes, and spur adoption of best practices across their vast sales force.



“We’ve recommended Ledgeview Partners several times, and will continue to do so.”

- DOT Foods

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TELMARK SALES SOLUTIONS



Industry: Niche Sales & Marketing
Service: Salesforce

With a goal in mind to successfully meet the personalities and processes of each customer, through working with Ledgeview, Telmark exceeded expectations.



“We had interactive meetings, which were great. They kept up with everything we were trying to do, which was awesome. When we revamped the ordering system, for example, they redid stuff within a day, which was really impressive. Ledgeview felt very much like a partner. They were willing to invest in what we were doing.”

- Kay Halbrog, Telmark Sales Solutions VP of Sales and Marketing

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ACPA – COLLEGE STUDENT EDUCATORS INTERNATIONAL

Industry: Nonprofit
Service: Salesforce

ACPA joined with Ledgeview Partners to build a new Association Management System (AMS) using Salesforce as the system's foundation. The partnership allowed ACPA to fly, utilizing Salesforce's best-in-class integrations to develop a customized system to fulfill their overall mission.



“We knew if we went to Ledgeview they’d be able to help us more efficiently because of their industry knowledge and their customized CRM product. The dashboards were a big thing to us, and their industry experience put us at ease and made us feel comfortable.”

- ACPA - College Student Educators International

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GREATER FOX CITIES AREA HABITAT FOR HUMANITY

Industry: Nonprofit
Service: Salesforce

With an impressive amount of programming, volunteers, clients, and their progress, land, and banking to keep track of, Greater Fox Cities Area Habitat for Humanity needed a solution that would support everything they do. They found the solution they needed in Salesforce and Ledgerview Partners.



“Ledgerview did an excellent job of making sure I understood Salesforce’s current functionality, the benefits of Lightning, the differences between Classic and Lightning, and anything Salesforce-related that would help us be successful throughout the implementation. That was huge.”

- Amy Ristow, Chief Operating Officer, Greater Fox Cities Area Habitat for Humanity

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LUMIN SCHOOLS



Industry: Nonprofit
Service: Salesforce

LUMIN Schools was experiencing repeat issues with data entry processing when they knew that they had outgrown their CRM solution. Through strong nonprofit peer referrals, LUMIN Schools leaned on Ledgeview's expertise to invest in Salesforce as their new trusted solution.



“Salesforce has a very, very high overall value. I know that I don’t have to worry about the integrity of our data, whereas with our other solution, that was constantly on my mind on a daily basis.”

- Steve Dykema, VP of Mission Advancement at LUMIN Schools

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NATIONAL HEALTH FOUNDATION

Industry: Nonprofit

Service: Microsoft Dynamics 365

National Health Foundation was looking for a solution that would help meet the needs of their changes in programming that have evolved over the years. In Microsoft Dynamics 365, they found a solution that helped them sustain compliance and best serve their programming; and, in Ledgeview, they found a responsive partner that helped them exceed deadlines while offering essential ongoing support past the initial phase of development.



"Working with Ledgeview made everything easier. I knew I could rely on them, and had a partner in solving whatever challenges came our way."

- Crystal Hertz, Manager of Research and Evaluation at National Health Foundation

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LIFT USA

Industry: Nonprofit
Service: Salesforce

LIFT USA, a nonprofit dedicated to helping youth from extremely impoverished families in India, looks to Ledgeview to help them leverage Salesforce to consolidate years of donor data and contact information to build deeper, stronger relationships with their supporters. Ledgeview helped move their rich history to a modern, usable CRM Solution.



“Everyone [at Ledgeview] was very responsive, and they were friendly and easy to work with. We got everything we wanted, and the process went smoothly. I’d recommend them.”

- Katie Heaps, Director of Development and Stewardship at LIFT USA

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COMMUNITY ACTION COALITION

Industry: Nonprofit
Service: Salesforce

The Community Action Coalition started with a CRM system that provided “painful reporting,” and with all the programs they had developed over time, they sought a CRM solution in Ledgeview that would help them consolidate, clean, track, and move data into the Cloud, among other pressing people-oriented objectives.



“The design process was really, really good. Ledgeview took the time to understand what we do and how we do it. That helped the [Salesforce] design process A LOT.”

- David Knickmeier, Community Action Coalition for South Central Wisconsin, Inc. IT Operations Specialist

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SAFE AND SOUND



Industry: Nonprofit
Service: Salesforce

As a Milwaukee, WI-based nonprofit, Safe and Sound was looking for a Salesforce CRM System that could help them retain institutional knowledge, consolidate data, and build stronger relationships with their local communities. In Ledgeview, they found a partner and lasting Salesforce CRM Solution.



“There’s an authenticity to the work that Ledgeview does. They’re honest and transparent, and their passion is completely reflected in the work they do. You can trust them.”

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- Bree Spencer, Director of Evaluation and Technical Assistance at Safe and Sound