



# Case Study

## LINC SYSTEMS: CRM DIGITAL TRANSFORMATION

### The Situation

Joe DeMarco has an excellent handle on the information technology capabilities at LINC Systems where he serves as VP of business development and communication. "We know what we want, just not how to execute the technical part of the project . . . and since we've acquired four companies in the past year or so, the need to integrate this additional data into our technology platform has outpaced our ability to keep up. As we build our company into a platform for acquisition and growth, speed and good communication is of utmost importance as we incorporate systems under one umbrella."

"We are big Microsoft 365 users, and we inquired with several companies to help us get this data into Dynamics 365 CRM. We understand the importance of having visibility across our business, as well as making good decisions from the analysis of this information. Since we knew our own capabilities would not get us to where we needed to be, it was paramount we find a fast and reliable vendor we could trust."

To ensure he was getting exactly what he wanted, Joe took the time to build out a full strategic plan, listing all executables to present to vendors to help them scope the project. After screening several vendors pushing their solution

to LINC Systems as the "complete answer", Joe did not come away with a feeling of trust. "I felt they were overselling their capabilities - I needed a trusted and reliable advisor to come alongside and work with me and understand my needs."

"At this point I was overwhelmed. I did not want to deal with an unproven company that didn't seem capable of accomplishing what I needed, and in the end producing an incomplete project while wasting a lot of time and a lot of money."

### The Solution

"We actually made a decision to hire a company to execute on our Dynamics 365 program when a fellow employee came forward. He mentioned he had partnered with Leaf on a project when he was working at another company. Out of respect for him, and honestly, to validate our choice we brought Leaf in to discuss our needs. We were so impressed with the process Leaf used to get to know us and to truly understand what we were looking for in an advisory fashion, we opted out of our first choice. Luckily we hadn't signed anything yet."

The experienced team at Leaf applied their strategic approach, taking the necessary time to understand how the business operates and

what outcomes are desired to determine the best course of action. Earning trust and collaborating towards agreed upon outcomes sets the roadmap towards complete buy-in from the entire organization.

"As we continued through the process with Leaf, they looked at our needs from a holistic standpoint, assessed them from a business perspective, and consulted with us to help us execute these big changes successfully."

The methodology Leaf uses throughout the course of a project engages the client and significantly increases end user adoption of the final product.

"Leaf put into place CRM tools that ties our 'marketing machine strategy' together - and now we're well on our way to transforming our sales operation."

## The Results

Joe is now able to see sales and marketing processes completely transformed with the ability to track ROI. He considers this project a work in progress and desires the CRM to be the "ERP for the front end." The timing of deploying this cloud-based solution was ideal since many employees are working from home due to COVID-19. Communication to the national customer base remains top notch.

As a result of this successful project, Joe and his group are now seen as leaders by company ownership and have surpassed the technology capabilities of their near industry peers. "We are now seen as leading edge in the industry, and I have done numerous interviews with industry publications on our complete sales and marketing process transformation. Leaf played a big role in this project's success, and I look forward to continuing to work with Leaf."



LINC Systems, based in Westfield, Indiana nationally distributes fastening and packaging solutions in addition to industrial supplies to a broad range of end markets including pallet, furniture, housing, construction, and general industrial. The LINC Systems Mission Statement is, 'To Dream Big and Deliver Beyond Our Customers' Expectations!'