



CASE STUDY

HAMPEL OIL

Hampel Oil Implements CRM for Oil & Gas to Help Improve Customer Relationships

Explore how Hampel Oil uses a highly customized “out of the box” customer relationship management (CRM) system to access customer information anytime, anywhere and manage competitive share of wallet opportunities.

THE SITUATION



Digital transformation began permeating the oil and gas industry. Hampel Oil was one of the first distributors to implement a CRM system to help consolidate customer data.

THE SOLUTION



Hampel Oil leadership sought out a CRM system that could fit their unique business needs. They selected **FORVIS** Business Technology Solutions professionals to help implement a CRM for Oil & Gas product, powered by Microsoft Dynamics 365 Sales.

THE BENEFIT



Since implementing CRM for Oil & Gas, powered by Microsoft Dynamics 365 Sales, Hampel Oil territory managers have unlocked efficiencies helping them gain quick access to customer information even when in the field and a competitive edge with share of wallet insights.



“After watching Reybrock present, we really started thinking seriously about working with his team because they already had an oil and gas CRM product. We knew if we chose to work with them, they’d be able to effectively help us because of their industry knowledge and customized CRM product.”

– **Staci Terstriep**, Marketing Operations Manager



THE FULL STORY



Starting in 2015, many major oil and gas companies began leading the charge for digital transformation. This included internal initiatives along with external initiatives to bring partners, including distribution partners, up to speed with business technology advancements.

Since 1976, **Hampel Oil Distributors, Inc.**, a leading petroleum marketer based in Kansas, has been a family-owned and operated business with a commitment to providing superior customer service. Yet, as the business grew, processes for collecting and storing customer information didn't keep pace. The digital transformation initiative provided Hampel Oil with the opportunity to consolidate a scattered collection of spreadsheets and personal address books. The leadership team decided to implement a customer relationship management (CRM) system.

As Hampel Oil leadership began researching CRM systems, Staci Terstriep, Hampel Oil Marketing Operations Manager, and some of her team members attended a presentation on CRM for Oil & Gas, powered by Microsoft Dynamics, led by Steve Reybrock, Managing Consultant with FORVIS Business Technology Solutions.

Hampel Oil has always been focused on providing exceptional service for its customers, at times following some customers into new states to provide continuity of service. What the presentation illuminated for Terstriep and her team was that CRM not only could help them consolidate customer information, but also that it could help them meet customer needs faster. They began to realize they were missing opportunities with existing customers. They discovered they couldn't quickly view customer information to understand what they had been ordering or, more importantly, what they hadn't been ordering but probably needed.

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team because they already had an oil and gas CRM product. We knew if we chose to work with them, they'd be able to effectively help us because of their industry knowledge and customized CRM product. In addition, the dashboards in their CRM product were a big plus for us. Reybrock's industry experience helped us feel comfortable about selecting his team as our CRM partner," Terstriep said.

Hampel Oil chose FORVIS Business Technology Solutions professionals to help consolidate their customer data to gain a clearer picture of their customers' needs with CRM for Oil & Gas. The system, powered by Microsoft Dynamics 365 Sales, helps lubricant marketers get up and running with CRM technology in about 10 weeks.

FORVIS Business Technology Solutions professionals worked with Terstriep and her team, as well as with Hampel Oil's internal IT department, to configure, install, and deploy an internally hosted version of CRM for Oil & Gas. The immediate focus was to migrate all their data into the new system, creating a central hub for contact information, sales activity, and financial data.

Once that was completed, the challenge was to get buy-in and encourage user adoption among the company's many territory managers. The territory managers are a diverse group of individuals representing a wide array of ages and technical understanding. This didn't discourage Terstriep. Built on Microsoft Dynamics 365 Sales, Terstriep felt that the system was streamlined and intuitive.

"The CRM for Oil & Gas system was easy to use for us. FORVIS helped to make it very user-friendly. A lot of our territory managers

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are younger and comfortable with technology, but some are older and not as comfortable. Those managers were concerned that they wouldn't be able to figure the system out, or that it would slow them down. But that wasn't the case. The buy-in has been really great!” Terstriep said.

Hampel Oil has been using the CRM system for nearly a decade now. Terstriep still is excited about the system's positive impact on customer relationships and efficiency.

“We want all our territory managers to be able to access all of their customers' information anytime, anywhere. This includes all open opportunities, purchase details, and communication activity. Before implementing this CRM solution, the only way to access that data was to ask someone for a report, which took a lot longer to compile than the mere seconds it takes to click into the information in CRM. The time-savings and efficiencies add up pretty quickly, not to mention how much it improves our service to our

customers by being able to access detailed information on-site in the field instantly,” Terstriep said.

Hampel Oil also uses their CRM system for sales forecasting and reporting. They've realized how valuable dashboards and reports are as tools for internal coaching. They've started providing regular coaching to their territory managers based on CRM metrics. “CRM dashboards make it very easy to review progress and provide specific coaching for individuals,” Terstriep added.

In conclusion, CRM for Oil & Gas has helped Hampel Oil grow lasting relationships with each of its customers and gain a competitive edge. Hampel Oil embraced digital transformation and developed modern processes that fused together customer service and technology.

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