




# Gaubert Oil

Reaping the Benefits of a Unified System

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**mazars**



## Case Study Snapshot

**Gaubert Oil's transition to Microsoft Dynamics 365 Marketing for email marketing and analytics boosted productivity for sales professionals, helping them prioritize leads and make better decisions.**

### The Situation

Gaubert Oil is a leading distributor of lubricants and fuels in the Gulf South. Despite its success, the company faced challenges with office technology, particularly in its sales group, which lacked access to sales data and a well-defined sales process.

### The Solution

With a need for seamless integration and ease of use, Gaubert Oil decided to transition to Microsoft Dynamics 365 Marketing. Technology consultants from Forvis Mazars assisted with the move by customizing the system to align with the company's sales strategy and implemented a lead scoring program.

### The Benefits

The new system has streamlined Gaubert Oil's sales process, improved efficiency, and provided clear insights into lead quality. The ease of use and integration of Microsoft Dynamics 365 Marketing has allowed the sales team to focus on one platform, enhancing their productivity and forecasting confidence. The lead scoring process has helped prioritize leads and allowed for more effective planning of business development activities.

“Everybody's sales process is different, but for what we do, especially in the oil and gas industry, or fuels and lubricants distribution business, Dynamics 365 Marketing does exactly what we want it to do.”

– Ron Gerlach, Gaubert Oil Director of Marketing





# The Full Story

Headquartered in Thibodaux, Louisiana, Gaubert Oil was founded by Nolan J. Gaubert in 1926 as a one-man operation. Since then, the company has grown its sales and distribution services to include fleet operations in commercial, industrial, and farming markets throughout several Louisiana parishes. Gaubert Oil also established a large, modern oil and gasoline plant and service headquarters. Gaubert's grandson, Grady, took over as president of operations in 2005, becoming the third generation of the family to run the company.

Gaubert Oil has a long-standing client relationship with the customer relationship management (CRM) team at Forvis Mazars, which previously helped the company with its CRM for Oil & Gas solution, powered by Microsoft Dynamics 365 Sales. The transition to Microsoft Dynamics 365 Marketing was sparked by a burdensome marketing automation setup that included logging into two systems, manual data transfer, and redundant processes. Gaubert Oil evaluated the Dynamics marketing application and concluded that a native systems integration made more sense.

## Implementation & Integration

Forvis Mazars customized the CRM and marketing automation applications to align with Gaubert Oil's sales strategy, which involved setting up stages and steps within the CRM system to provide a seamless experience for the sales team. Thanks to the unified system, sales and marketing professionals no longer had to switch between platforms, allowing them to work more effectively.

A custom lead scoring and grading program was set up within the marketing application, assigning scores based on customer fit and digital interactions. Higher scores indicate more engaged leads, allowing sales staff to focus on the most promising prospects. The system provides transparency by showing the actions that contributed to the score.

The implementation of Dynamics 365 Marketing went smoothly with a series of interactive training sessions that allowed staff to practice using the new system step by step. The customized system offers clear guidance that helps sales and marketing staff stay organized and focused on their tasks.

Another benefit to integrating the marketing application is that Gaubert Oil's email marketing campaigns are now personalized by industry, addressing specific needs for different markets such as marine and agriculture. Sales and marketing professionals receive clear data on marketing campaign performance, helping them see what's working and what needs improvement.

## The Results

Microsoft Dynamics 365 Marketing significantly improved Gaubert Oil's lead management and sales processes, empowering the sales and marketing teams to plan each day more effectively and more confidently forecast sales.



Business Technology Services at Forvis Mazars can help support your organization with enterprise resource planning (ERP), customer relationship management (CRM), advanced technology, and managed service solutions. Our end-to-end services include technology assessments, design, implementation, upgrades, training, monitoring, and support to help clients achieve their digital transformation goals.

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