



LEAF SOFTWARE SOLUTIONS

SUCCESS STORY

INDIANA MUNICIPAL POWER AGENCY SPEAKS WITH ONE VOICE AFTER IMPLEMENTING CRM



Indiana Municipal Power Agency is a not-for-profit agency that wholesales electric power serving the needs of 61 cities and towns in Indiana and Ohio. IMPA was founded in 1983 and is based in Carmel, Indiana.

THE SITUATION

Raj Rao, Chief Executive Officer and President of the Indiana Municipal Power Agency (IMPA) understood communication throughout his organization was suffering from a versioning problem. On any given day, IMPA departmental staff would interact with personnel from their member communities, but the information obtained during those interactions would not be available to others back at IMPA headquarters. The information might make its way to some, but not to the entire organization.

Raj noted, "Sometimes a staff member would call me directly, and I'd hear one story from the engineer, and something different from the vice president. When our member services department went out to visit members, they heard a different version. By the time the problem or concern came back to me, I'd have six different versions of the same story. I'd have to call the commissioner back and clarify."

The timeliness of communication was also a concern, as several days or weeks could pass before information was shared with everyone who needed to know. A different staff person visiting the same member community a day or two later would not have updated information, leading to confusion.

IMPA needed a centralized location to record interactions from member communities that could be easily accessed by all IMPA staff, whether in the office or traveling to member communities. IMPA also needed to store vital contact information and statistics regarding each member. The solution had to be user friendly, easily accessible, and mobile.

As IMPA started the journey towards a solution, they found there was no specific technology on the market to meet their needs. The customer relationship management (CRM) programs they explored were designed for sales personnel and for-profit companies.

As a member-focused, not-for-profit organization, their priority was to maximize and manage relationships within member communities. This meant access to accurate information and resources was vital. Everyone, from every department, needed to be speaking with the same voice.

Looking toward a future without a solution in place, IMPA could see more communication breakdowns. Keeping IMPA staff aligned on what was happening in member communities would only become more and more difficult.

Raj commented, "When we were 24 members, I knew all of them personally. Every city councilman, their families – everyone – but when we became 61 members, you can imagine it's not as easy to know everyone on a personal level."

Without a centralized location to store information, the existing channels of communication – email, phone, or in person – is at risk of being excluded or missed by IMPA staff who would benefit, which would be detrimental to their projects and ultimately affect relationships with members.

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THE SOLUTION

Research was performed before contacting various companies to request proposals. IMPA is a Microsoft-based organization and wanted to ensure a seamless integration with current products, while also capitalizing on the existing familiarity with the Microsoft product environment. Quotes were received from two organizations, and IMPA ultimately chose to partner with Leaf.

Raj added, "We looked into Salesforce – being they are the biggest company in town – and found it is made more for salespeople. It's a great product, they do a super job, but it has nothing to do with what we're doing. We needed to mold software into something that would be helpful to IMPA. And that's where Leaf came into the picture. The right fit for us was someone who would understand our language, our way of doing business, translate it, then implement the solution for us. When we met the Leaf people for the first time, we recognized we had a lot in common."

The proposal from Leaf was customized to IMPA's needs, with assurances that a long-term relationship would be formed to ensure the project was completed and supported. Leaf began with their SureStart process and took the time to meet with various representatives from every department to gauge what features were needed. These meetings were consistent – with the intention to ask questions, build trust, and gather feedback. This up-front work pays off with higher user adoption due to real ownership and buy-in as the process progressed.

Raj explained: "Leaf came in and talked to our staff to help gain their confidence. Everyone had a different problem – Leaf was able to listen to their questions, comments, and concerns, and they'd come back and rectify them. Leaf showed them the way to solve the problem, and the staff agreed to give it a try."

The project was implemented in phases, and Leaf allowed ample time to ensure expectations were met. Several training opportunities were presented to IMPA staff, and support was provided as the project moved through additional stages. This ensured the CRM system surpassed expectations at each stage.

Leaf used their expertise within the Microsoft Power Platform to customize, install, and integrate Microsoft Dynamics 365 CRM into the company's environment.

As part of the process, Leaf worked to understand the organization and the ultimate goals IMPA communicated. As trust was established, Leaf and IMPA worked together as partners, not as a typical client-vendor relationship.

THE RESULTS

All staff now have ready access to up-to-date information about all member communities – commissioners, community representatives, recent interactions, ongoing projects, contact information, and IMPA resources. Most importantly, everyone has access to the information in real-time, which keeps everyone up to date.

Using the Microsoft Dynamics CRM has increased communication and as a result, strengthened relationships. Staff members understand what is happening in member communities prior to visiting, so there are fewer surprises. Questions and concerns that normally would surface only during monthly board meetings are now visible within CRM, addressed, and then resolved.

IMPA continues to surface new ideas to better utilize CRM to impact operations. The goal of everyone speaking with one voice – from the field workers to the accountants, to the CEO – has been realized.

Raj stated, "Leaf became a partner to IMPA. We used Leaf just like another department within the company. They were here to provide help. So anytime we need something, the staff is comfortable that Leaf can be called upon for further consultation."

IMPA has always been seen as a leader, innovator, and knowledge expert in the electric industry. With the addition of the Microsoft Dynamics 365 CRM solution custom built by Leaf, IMPA will continue to be regarded in high esteem by members, their customers, and others in the industry. Internally, it has simplified the notification process and increased communication, leading to greater collaboration among departments.

Raj concluded, "Now, through regular communication in CRM, issues are resolved before they become problems – to the point where I didn't know a problem ever existed – and that's a good thing! I review the activity dashboard daily, and when I talk to a board member, they're very impressed with the level of detail I have."