How Burch Oil & Propane Accelerated Credit Decisions and Sales in Salesforce

Powered by Cloud Maven, Inc Credit Checker

Real Time — **Soft Credit Checks**
Core workflows managed within Salesforce

One Interface — **For CSRs**
Customer and credit data in Salesforce

FASTER — **Sales Conversion**
Capture customers during live interactions

CLIENT & PROCESS CONTEXT

Burch Oil & Propane is in the petroleum and fuel distribution business, serving a wide range of commercial and residential customers. Through the years, Burch has been able to maintain a solid reputation for reliability, operational efficiency, and strong relationships with customers.

Over time as the business grew, the complexity of managing customer data, credit approval, and sales process increased. Like many established companies evolving with modern tools, Burch needed to be able to increase the speed, visibility and simplicity in their business processes without negatively impacting the level of service that it was known for.

WHY CHANGE WAS NEEDED

1. **Fragmented Customer Data**
   Information was spread across multiple systems
2. **Manual Credit Checks**
   Back-and-forth processing slowed approvals
3. **Disconnected CSR Experience**
   Teams switched screens during customer calls
4. **Slow Order Completion**
   Approval delays impacted fulfillment speed
5. **Missed Sales Opportunities**
   Delays made customer conversion more difficult

THE BUSINESS CHALLENGE

As operations scaled, Burch faced problems with the methods used to handle customer credit checks and data. The current processes were broken up, which made the interaction with customers and the decision-making process slow.

Key challenges include:

- Customer information was located in multiple systems.
- Credit checks required back and forth communication and manual labor.
- CSRs had to switch between screens when interacting with customers.
- The delay in approvals meant slow order completion and missed opportunities.

Both the employee productivity and customer satisfaction experience were impacted by these problems.

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THE CLOUD MAVEN, INC SOLUTION

Burch Oil & Propane implemented Cloud Maven Inc's Credit Checker to unify their workflows, enabling faster credit decisions and smoother customer interactions from Salesforce.

CORE CAPABILITIES

- **Unified Customer & Credit Data:** Bring customer and credit information into one system.
- **Automated Credit Workflows:** Trigger credit checks through structured Salesforce workflows.
- **Real-Time Soft Credit Checks:** Run soft credit checks while CSRs speak with customers.
- **Salesforce-Based Processing:** Complete credit activities without leaving the CRM.
- **Workflow Customization:** Configure the process around existing business operations.
- **Scalable Credit Operations:** Support growing customer and transaction volumes over time.

IMPLEMENTATION APPROACH

We collaborated with Burch to identify their needs and customized the application to fit perfectly within their business workflows. The application was customized to the manner in which their teams worked, with little to no disruption during adoption.

During the implementation, we provided hands-on support, fast responsiveness, and continuous optimization. This allowed for a successful implementation for both the leadership and frontline teams of Burch.

"The Cloud Maven, Inc solution Credit Checker really helped us capture the customer while they were on the phone. We didn't have to worry about doing applications and sending information backwards and forth. We were able to do a soft credit check and get that customer the product out to them. We are old company, so we were able to get that delivery out to them and capture sales a whole lot quicker."

- Paul Scheller, Burch Oil & Propane

BUSINESS RESULTS

Burch Oil & Propane transformed a fragmented credit process into a centralized Salesforce workflow, helping CSRs complete credit checks faster, serve customers more efficiently, and move orders forward with less friction.

Real-Time Credit
during customer conversations

One Unified Interface
for customer and credit workflows

Faster Sales Capture
during live customer calls

- Customer onboarding and order fulfillment became faster.
- CSRs spent less time switching between systems.
- Operational visibility improved across the credit process.
- Customer interactions became smoother and more responsive.

Learn more: solutions@cloudmaveninc.com | +1 (740) 470-0000 | Book a demo