J.H. LARSON COMPANY

From Tribal Knowledge to Total Visibility

How J.H. Larson Rebooted CRM Strategy with White Cup

When a leadership transition and a strategic mindset aligned, J.H. Larson left legacy tools behind, and rebuilt CRM adoption from the ground up.

At a Glance

Customer: J.H. Larson

Industry: Electrical, plumbing, HVAC distribution

ERP: Epicor Eclipse

Headquarters: Plymouth, MN

CRM Users: 28+ outside reps, 8 branches, 4 showrooms, TSMs, and full cross-functional rollout

Challenge: Legacy CRM with poor adoption and fragmented visibility

Solution: Migration from TDF to White Cup CRM, fully rolled out across teams

Results: Unified CRM adoption strategy, cross-team rollout, and better customer intelligence

A Legacy Business, Modernizing for Growth

J.H. Larson is a 100+ year-old distributor with a deeply tenured outside sales team and eight branch locations across the Midwest. For years, the company relied on TDF CRM, but adoption was limited, and most reps kept information in their heads or on paper.

> *"Everything was in their heads. We had reps go out on medical leave with no notes or visibility into their books of business."*
>
> *– Curtis Wickersham, Sales & Pricing Manager*

With a new sales leader and a changing business landscape, the team knew it was time for a change.

The Catalyst for Change

In early 2024, Sales & Pricing Manager Curtis Wickersham stepped into a broader leadership role following a transition in sales leadership. Simultaneously, he began coursework in Texas A&M's MID program, exploring AI, sales strategy, and CRM adoption.

> *"I kept seeing all these features in my research – and realized, we don't have that. We're not using what's available to us."*

Rather than expand access to their legacy TDF instance, Curtis evaluated a switch to White Cup CRM. The timing was perfect: their fiscal year reset, user limits were removed, and Curtis had the executive support he needed.

Building Buy-In by Design

Curtis wasn't just switching tools. He was rebooting the entire CRM culture at J.H. Larson.

"We didn't want another siloed tool. White Cup connects our full sales function – lead to account to campaign – all in one place."

Key Moves:
- Two Territory Sales Managers will lead by example as CRM-first team managers
- Super users identified in each branch to champion usage and field questions
- CRM access rolled out across sales, marketing, inside teams, and admin staff
- Data warehouse integration underway to track KPIs, adoption, and activity metrics

Early Wins, Strategic Momentum & What's Next

Curtis and team are already seeing the benefits of moving beyond TDF. With White Cup CRM, they've launched marketing campaigns and lead gen efforts from a single platform, uncovered account gaps without manual reporting, and empowered reps to track visits more consistently – all from a mobile-first experience that's built for how sellers actually work.

Even more important? CRM is no longer viewed as a sales-only tool – it's becoming a cross-functional system that supports inside sales, branch leaders, and marketers alike.
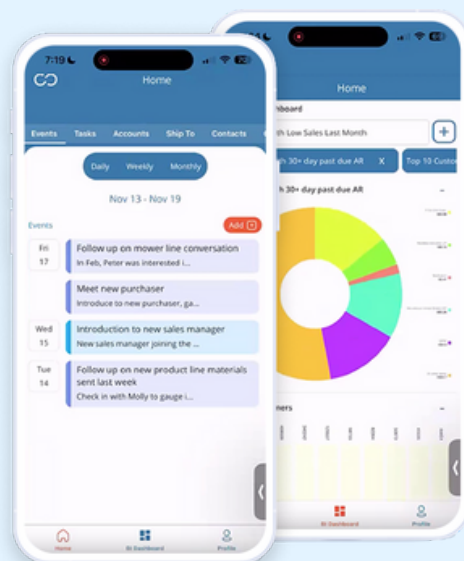
"The old app felt like an afterthought. This one will actually drive adoption."

– Curtis Wickersham,
Sales & Pricing Manager

Looking ahead, Curtis is building a customer stratification model and AI-supported sales motions, with White Cup CRM serving as the central hub for planning, strategy, and performance.

His advice to other TDF users?

Start the conversation. Ask around. Talk to others who've made the switch – whether that's in AD buying groups, peer cohorts, or industry networks – and see what's possible.

"We're not sprinting to adoption. We're doing it intentionally – and this platform is going to grow with us."

Why J.H. Larson Chose White Cup

- **Epicor Eclipse Integration**
- **Distribution-specific workflows**
- **Unlimited user access**
- **Functional mobile app**
- **Unified sales + marketing**

Ready to see what's possible beyond TDF?

Let us show you how White Cup CRM can help you modernize your sales strategy, unify your team, and move faster.

Learn more at whitecupsolutions.com