

# Six months to success: How choosing the right Salesforce Partner enabled a seamless merger for Staffbase and Bananatag

[April 6, 2022 - Written By Kathryn Castle](#)

Staffbase was founded in 2014 with the goal of bringing a mobile-first approach to employee communication. The Staffbase platform allows companies to launch their own branded app for corporate communication, sharing information and mobile processes and is trusted by over 1000 enterprises worldwide.

Candybox and Staffbase began working together in 2019 and have continued their partnership as Staffbase has grown and built out their internal Revenue Operations function. In recent years, the company has been expanding into the US market. Part of this strategy includes meaningful acquisitions that augment and complement Staffbase's existing product suite.

Bananatag was the second company to be acquired by Staffbase in recent years. As Bananatag was larger and more complex than prior acquisitions and the migration timeline aggressive, Staffbase decided to partner with Candybox on the integration project.

We spoke to Claudio Cocivera, Senior Manager of Business Systems & Processes at Staffbase, about the project and how the partnership with Candybox helped deliver strong results on an aggressive timeline.

## **What is your role at Staffbase and what are you and your team responsible for?**

I am Staffbase's Senior Manager of Business Systems & Processes. I make sure that all tools are following Staffbase internal protocols and ensure that we structure our business processes in a scalable way and that all business stakeholders are bought into our systems roadmap.

## **Why did you decide to engage a Salesforce partner for this project?**

There were several factors that made this a difficult project to tackle independently. Firstly, the project scope was very broad. We needed to analyze all of Bananatag's systems and processes and understand what adaptations we would need to make to Staffbase's systems in order for both of the companies to merge seamlessly. Due to multiple factors, there wasn't anyone who could give us a single bird's eye view of the company's tech stack and data model.

Additionally, we only had about 6 months to complete the project, which was a very aggressive timeframe. On top of that, the Business Systems team already had many important projects in flight for various stakeholders at the company, which we'd either need to postpone at cost to the business, or which would put the migration timeline in jeopardy.

I'd been asked to draft the migration plan, and it was clear from the start that the project was far bigger than anything we'd managed previously. Therefore, we made the decision to outsource all discovery and technical implementation to Candybox, as well as many of the project management duties.

### **How did you structure the project roles?**

I took on the role of technical architect and advisor, providing context and guidance, as well as reviewing the solutions being built from a technical perspective. Candybox took the role of external project manager and technical architect.

In addition to the core project team, there were about 5 other teams involved on both sides: CS, Sales, Marketing, Finance, RevOps. There were about 2-3 stakeholders per team per company. The sheer number of people involved made things quite complicated. Combined with some turnover that happened near the start of the project, it was often hard to fully understand a given team's processes and why things had been structured a certain way.

### **Why did you choose to partner with Candybox on this project?**

I have a long history with Candybox – we had actually already worked together at a previous company. When I moved to Staffbase, I found that Candybox had already been consulting there for quite some time. We've essentially been collaborating since my very first day at Staffbase! The existing relationship we had, and Candybox's existing knowledge of Staffbase and our processes, made it easy to choose them for this project.

### **How did you structure the project and how well did the actual project execution map to your original expectations?**

We split the project into five stages – discovery, design, build, release, and enablement. In the discovery and design phases we were looking to understand both companies' processes and understand why they worked that way, then define the new unified processes going forward.

During the build phase, we built out and tested the technical implementation. Finally, during the release and enablement phases we imported data, transitioned build work into our production environment and made sure users were trained and ready for rollout.

As anyone who's done project management knows, you can never fully plan for every eventuality. It's good to have plans and milestones, but you won't be able to stick to the plan 100%. As such, we encountered two main challenges. The first was that we had such a short time to complete

the project. We had only six months for something that realistically should take a year. The second challenge was that we ended up spending longer investigating tooling and process in Bananatag's Salesforce org due to turnover and lack of a bird's eye view.

Saying that, I knew from the beginning that the project was a huge amount of work and some kinks were to be expected. Despite all that, we ended up following the initial project plan very closely.

### **How would you rate the success of the project?**

We accomplished everything that we planned to and the project was a great success. In light of how I've seen some migration projects go – even small ones – I really think we did a great job. Everyone is extremely satisfied with Candybox's work. I don't think it would have been possible to deliver at a higher standard than what we were able to achieve.

### **How would you measure the value that Candybox provided?**

Along the migration project, the Business Systems team had multiple other projects in flight. Without the Candybox, it would have been impossible for us to make any progress on these other initiatives. I could trust Candybox to run meetings and initiatives independently and get to the same result as if I'd been in the meeting myself, which saved so much time and reduced my mental load significantly. The migration happened within the timeline expected with no major bugs, and Candybox really took the time to understand both businesses and built processes that make sense, even with minimal input from the Staffbase and Bananatag teams. The ownership that Candybox took is something we've always valued in our partnership and which was a factor in the project's success.

### **Where would you attribute the project's success?**

First of all, we came up with a solid plan together. This helped us to stay on track and communicate the complexity of the work to our stakeholders.

Secondly, Staffbase's and Candybox's way of approaching problems is similar. With other consultants I've worked with, it's generally a question of either they can do what you've asked them to do or they can't. When you go to Candybox with an ask, it's more of a conversation, and you know that what you decide upon together will be the best solution for your team. I like that Candybox is not afraid to push back for the good of their customers and they're always happy to jump on a call and deep dive any topic to come up with solutions that make sense.

The final thing that helped the project succeed was the balance we struck between structure and flexibility. We managed to hit a great balance where the team breakdown and project plan provided structure, but both teams were able to work in a flexible way to roll with the punches that inevitably came up.

### **What did you expect to be the most challenging part of the project? What ended up being most challenging?**

The data migration. It was the most complex aspect of the project.

I wouldn't have been able to do this by myself and Candybox was the greatest support I could imagine. Based on a test migration in sandbox, their team put together a step by step guide that was incredibly helpful. This enabled team members who had zero information about the project and the data to jump in and successfully map data files.

### **What's next for Staffbase and what role do you see Candybox playing?**

We want to continue improving our processes and making improvements that were postponed in 2021 to lack of resources. We anticipate strong growth in 2022 and will need to make sure our tech stack is optimal and scalable.

We plan to engage Candybox to evaluate the processes and make sure that they are as scalable as possible. Who knows – there might also be additional acquisitions!

### **What would you say to companies who are evaluating if they need a consultant and what they should look for?**

100% do it – I'm of the opinion that it's always a good idea to have a consulting partner. They can help with tasks your team doesn't know how to do and they'll have also seen the same situation for many different companies and will know what the best practices are for a given situation. I firmly believe that any company using Salesforce should have a consulting partner.

If you're evaluating Candybox, I would say they have an amazing team. Everyone is super smart and super competent. They feel like a true 360 degree consulting partner. There has never been a problem the team was not able to solve. They give you not only expertise, but also flexibility, and you can be confident that the solutions you arrive at will be the best option for your company.