Kiddom Reimagines their Business in 3 Months

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Kiddom is an e-learning software provider that takes schools and districts into the future of personalized teaching and learning. Lisa Zumbrun, Director of Finance, took on what would be traditionally RevOps responsibilities in late 2022, inheriting a Salesforce instance with years of tech debt that no longer reflected how the business functioned.

Lisa was looking for a smaller specialized agency to help address these issues. It was critical for her that her chosen partner have an onshore presence and that they offered not only technical but also advisory service. She originally discovered Candybox on the AppExchange and was impressed by the initial conversations.

"But we also wanted to work with you because my whole team, myself included, were very new to Salesforce. I had only used it for reports and dashboards. I needed a partner who would be able to give me recommendations. If I gave my business needs, they'd give me recommendations instead of leaning on me very heavily for the configuration I wanted... to understand the implications different types of solutions have and know them going into it."

Prior to engaging Candybox, Lisa had recommended migrating off of Salesforce to company leadership because the company was using their CRM like a giant notepad. At the start of the project, she mentioned "We could probably run off a Google Sheet and it'd be more accurate than Salesforce." As the project began, it became clear that the company had several options - migrate off Salesforce to another platform, fix Salesforce and make it the company's official record of truth, or let Salesforce continue in its current role but have another system of truth. The decision was made to continue investing in Salesforce and reimagine the platform to become Kiddom's system of record.

In order for this to happen, extensive discovery work was carried out. The Candybox team worked with multiple departments at Kiddom to understand how the company and its teams actually operated before analyzing Salesforce to understand to what level those critical business processes were reflected. It became clear quickly this wasn't a piecemeal project, but a total

rework requiring extensive tech debt cleanup and reimplementation of almost every process with Salesforce. To give an indication of the level and complexity of the tech debt at the start of the project, the Candybox team discovered a custom Apex build meant to replace standard Quote syncing functionality and a duplicate of the Opportunity as a custom object with almost 500 fields. Additionally, the field meant to report on revenue was a free text field. There was zero confidence in reporting. As Lisa says, "*You can't be financially audited if you can't rely on your CRM.*"

Coming out of the discovery phase, a project plan was developed that involved a total reimplementation of many key aspects of Salesforce, including a rebuild on the Lead, Account, Contact, Opportunity and Quote objects in addition to introducing Contract Lifecycle Management and an Onboarding custom object. The Kiddom team knew their business and had many great instincts when it came to process management, but needed help architecting how things should work in Salesforce. Per Lisa: *"A lot of what we did was actually to create process. Formalizing processes that did not exist but should have existed. Or did exist but not documented anywhere. The Onboarding object was very important, the contract object was very important as it allows us to see what we're selling in terms of different grade levels. We can now focus and say to reps 'This product is selling very well in these grade bands in this region, so let's go there'"*

Working closely alongside Candybox, Kiddom was able to accomplish the bulk of this rebuild over the course of about three months. The impact of this effort was immediate - specifically being able to accurately report on product metrics and financials with confidence.

"Honestly, being able to report on ARR and TCV with confidence has been huge, and having a contract object now has been wonderful. For example, we were never previously able to answer the question: how many licenses do we have of Grade 6 math? We never had products. And if we had a hundred licenses, what is the split of those licenses between different curriculum partners? We'd never been able to answer that question before."

It's a common viewpoint that tools like Salesforce and consulting partners like Candybox are a significant cost, but Lisa reported that the project could actually end up reducing Kiddom's ongoing costs long term. The company has much greater visibility into who is working what, who is closing what, and really gives insight into whether their people are being utilized effectively. Not only that, but the process optimization means that each individual working within Salesforce can be much more productive in a given timespan.

Speaking of her experience working with Candybox, Lisa highlighted the team's responsiveness as a key factor in why the engagement was so successful: "*I feel that if we had gone with a very large org, they may not have been very responsive because our actual instance is very small. The team has never felt like we've been treated like we're a very small customer. I can tap into the Candybox team any time of day."* Another differentiating factor that became obvious as the

project progressed was Candybox's experience working across and integrating with multiple other systems that function alongside Salesforce. Being able to consider not just Salesforce in isolation, but also how Salesforce interactions with other systems brought a lot of additional value. In Kiddom's instance, one of those key systems was HubSpot, and being able to work on syncing the two platforms closely has been very beneficial.

What's next for Kiddom now that Salesforce works for the team rather than against them? Lisa told us: *"The challenge we have now is that you can iterate on Salesforce forever. Now that Salesforce is usable, people want more. Can you add this, can you change that? You can build on Salesforce forever. Now that it's usable, everyone is going onto their wish list of things. Having to hold that back is actually a challenge, but it's a nice problem to have!"*