

A grayscale background image of a classroom with several children. A large, stylized orange and grey graphic element, resembling a question mark or a large 'D', is overlaid on the right side of the image.

Dreambox Collaborates with EightCloud to Improve Sales Team Workflow

Business Challenges

DreamBox wanted to provide their rapidly growing sales team with the tools they needed to track new opportunities and sales within the highly competitive education technology market. They also needed to manage their existing subscription and service contracts.

With sales processes that were constantly evolving, DreamBox needed a CRM that could accommodate their ever-changing requirements.

They hired a series of contractors to develop a custom Salesforce solution. Unfortunately, the contractors had limited bandwidth and did not fully understand DreamBox's unique business needs. The lack of continuity in personnel coupled with limited opportunities for knowledge transfer whenever new contractors came on board, resulted in a Salesforce solution that was not sufficiently documented, and which did not have the functionality needed by the sales team.

“ We initially partnered with eightCloud to obtain a health analysis of our Salesforce instance to plan for future optimization. But when our SF Admin moved on to a new opportunity, eightCloud stepped in to maintain our daily operations, see through strategic initiatives that were already in motion, and deliver against the initially scoped work. Their flexibility and work ethic truly stand out. They've met our aggressive timelines and have remained incredibly responsive about meeting our changing needs. I would highly recommend partnering with eightCloud!

— **Christie Madsen**

Director of Business Operations, DreamBox Learning



DreamBox Learning is a privately-owned education startup that teaches K-8 mathematics standards in an adaptive game format. DreamBox serves nearly 3 million students and 130,000 teachers across the United States and Canada.



What We Did

- ▶ Conducted a thorough assessment and evaluation of DreamBox's existing Salesforce environment.
- ▶ Interviewed key stakeholders and conducted a needs assessment to identify critical functionalities and resource requirements.
- ▶ Created a product development roadmap that addressed the need to redo some of the work that had been done by prior contractors, helped establish priorities for new projects, and identified needed technical resources.
- ▶ Expanded the dedicated team assigned to DreamBox to include a Salesforce developer who could create new functionalities for their CRM.
- ▶ Improved the usability and stability of the new Salesforce implementation.
- ▶ Provided critical project management expertise and staffing resources to support planning and developing the architecture needed to update their Salesforce environment.
- ▶ Ensured the transfer of critical knowledge about how the existing Salesforce environment was being used and maintained.

Results

EightCloud was able to take a deep dive into DreamBox's business and technical needs using a flexible client-centered approach. This approach also allowed eightCloud to quickly pivot and scale resourcing as needed to complete specific projects. As a result, DreamBox has been able to:

Integrate Salesforce more tightly into their internal sales process. DreamBox assigned all their accounts to an account lifecycle and defined the actions required to move an account through various stages. Sales reps are automatically prompted to perform specific account management activities tailored to where an account resides in the lifecycle. This allows DreamBox to maximize their customer relationships and visualize their progress towards specific sales goals.

More easily capture a wider range of critical data points. Sales reps now have the ability to link all the secondary schools associated with a specific opportunity. They can also identify individual contacts in relevant departments such as IT and Purchasing. This provides for more in-depth reporting and accountability across multiple opportunity lifecycles.

Boost the performance and efficiency of their database. Dreambox's Salesforce environment was stabilized allowing for the doubling of the number of records that could be imported at the same time.

Key projects completed by EightCloud:

- ▶ Stabilized and cleaned up the code environment. This created a solid foundation for future development work.
- ▶ Developed standard Opportunity naming conventions.
- ▶ Developed an easy process for cloning (or duplicating) sales opportunities. This functionality streamlined the renewal process for customer contracts and ensured data consistency.
- ▶ Created an engine that provides flexible options for updating records that have internal links, such as child/parent records.
- ▶ Created an agile application within Salesforce that facilitated business planning and boosted productivity.

Talk to our Salesforce experts today.



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