



**MONDAYCALL**

# VitalSource Automates Customer Onboarding Process

A division of Ingram Content Group increases scalability while enforcing best practices for bringing on new customers



## BACKGROUND

VitalSource is a leading provider of digital learning content and the only provider of digital course materials able to combine curriculum, content and delivery into a single solution. VitalSource, (a division of Ingram Content Group), provides services to four business segments: online direct retail for students; indirect distribution of course materials to students through bookstores; online faculty textbook evaluation services; and institutional solutions for faculty and students that are integrated within campus technology ecosystems.

VitalSource improves the educational experience by offering all users, including those with print-related disabilities, with anytime, anywhere access to the course content they need. With more than 90% of the same core titles offered by major print publishers, the company's digital textbooks can be purchased for up to 60% less than the cost of new print textbooks.

## CHALLENGES

In the aftermath of a major acquisition, VitalSource needed to upgrade its infrastructure to support its significantly increased scale and scope. The post-sales implementation team in particular needed a way to handle the new customer onboarding load in a scalable manner so that their best practice process was repeatable and efficient. Because VitalSource works with many educational institutions with tight timelines, including fall and spring back-to-school inflection points, it was essential to accommodate peak periods that could potentially introduce bottlenecks in the process.



**VitalSource**

## Vital Statistics

- Market Leader in Digital Learning Materials
- World's Largest Library of eTextbooks and Digital Course Materials
- Location: San Mateo, CA USA
- <http://www.VitalSource.com>

## Business Challenges

- Customer Onboarding was done through email and Excel spreadsheets and needed to be updated and automated
- Company growth and seasonal peak periods required strong and flexible scalability
- Data was silo'd and systems were not integrated which created visibility and reporting challenges.

## Solution

- Salesforce Sales Cloud optimization
- Agile process enabled quick pivoting to daily changing needs
- Re-architecture of data structure to track Customers, Publishers, Book Lists, Contracts and more
- Automation of 75-point Readiness Assessment checklist to ensure best practices are enforced

## Benefits

- Better reporting to provide new insights into process, partner and customer relationships
- Increased efficiency in customer management process
- Automating comprehensive customer onboarding that improves customer success

Getting a customer on-boarded requires coordination among business and technical teams and can take months to accomplish. “Our customers are large educational institutions that expect everything to work when the school term begins,” said Chris Griswold, Senior Client Implementation Manager of VitalSource Technologies, Inc. “The process of rolling out digital content solutions in these institutions, coupled with technical integrations with Learning Management Systems’ (LMS), can be extremely complex and have many moving parts.”



VitalSource has a process that works smoothly, but the company did not have an infrastructure that supported and enforced its best practices. In addition, the rollout process was hampered by limited visibility due to outdated and cumbersome processes such as manual data aggregation and manipulation.

VitalSource was overly dependent upon email, spreadsheets and Word documents in order to onboard new customers. Recognizing that these tools were unscalable and unsustainable, VitalSource decided to engage with MondayCall Solutions to update their infrastructure to the Salesforce platform, with the goal of automating and scaling their customer onboarding process.

## SOLUTION

VitalSource partnered with MondayCall to map out a system that would automate the workflow and bring the onboarding process into the cloud. MondayCall first engaged with VitalSource to understand their business and to jointly map out continuous improvements to their environment. Using the Agile methodology with weekly sprints, VitalSource and MondayCall were aligned on a daily basis and focused on areas that impacted the business most. Improvements were addressed quickly and efficiently while keeping in line with business needs.

Utilizing the Salesforce Sales Cloud, MondayCall reconfigured the data models to custom map to the business, including the data tracking of customer book lists, projects, contracts, resellers and publishers. From there, MondayCall worked with VitalSource to automate the process, creating workflow rules to automatically alert people participating in the process flows at the right time. VitalSource uses a sophisticated Readiness Assessment checklist that tracks approximately 75 discrete items in order to make sure that every best practice is followed and that the correct path is taken down the decision tree. Approval processes were built to ensure that minimum requirements were met and to properly “green light” projects. From there, resources could be assigned with confidence from management.

Reporting was set up to create new views of the data. Multiple publishers provide source material for multiple booklists per customer. By improving the data-structure and reporting capabilities, VitalSource could quickly and easily track up-to-the-minute contributions by Publishers. Griswold noted, “A lot of our data tracking was tied up in free form text fields and in different data structures that weren’t tied together. This made activity and performance reporting a very manual process that we could only get infrequently.”

## BENEFITS

By automating the infrastructure, VitalSource was able to significantly improve its efficiency and attention to detail on Customer Onboarding. The Readiness Assessment had built-in workflows, approvals and alerts that made following best practices easy. By putting this online, every participant in the process (and even those who were not directly involved) had instant visibility into the status of each individual project.

*“Improving the infrastructure while moving quickly to meet market demands is always tricky. We worked with MondayCall to ‘change the tires while racing’ so that the transition was smooth.”*

*- Chris Griswold  
Senior Client Implementation Manager*

In addition, this process greatly reduced the number of documents that were in circulation for each customer. According to Griswold, “Our new automated processes have enabled us to remove five documents that we used to circulate as attachments for a given customer. Moving away from email attachments decreased ‘crossed wires’ and increased visibility for all participants, including professional services, account management and upper management.”

Griswold also noted, “Improving the infrastructure while moving quickly to meet market demands is always tricky. We worked with MondayCall to ‘change the tires while racing’ so that the transition was smooth.”

By architecting a proper structured data based system, VitalSource was able to drive more frequent insights into its own business. By tracking the customer in Salesforce and tying it to the project, VitalSource was able to better understand where each customer was in the implementation process and how each entity in the process was doing. For instance, Publisher contributions could now be reported in aggregate and sorted by different groupings such as by customer.

Griswold said, “Our complex process of onboarding and supporting our customers is now standardized. It has helped us be more efficient and faster while also providing much needed data and insights to our senior team. MondayCall has been a key partner to our success. Their understanding of how to apply Salesforce to our sophisticated business helped us take advantage of their experience in best practices – something that we had neither the time nor expertise in. With MondayCall as our trusted partner, we look forward to continuing to align our Salesforce investment with our current and future business needs.”

Andrew Yang, Managing Director at MondayCall noted, “The VitalSource team has a great blend of vision and execution skills. They have a big picture view that translates into targeted sprints to get the job done quickly and efficiently. They have a smart strategy to leverage the Salesforce platform to maximize business results.”

## Getting Started

MondayCall has a best practice methodology for conducting projects. We work closely with customers and focus on business first, technology second. We understand your business requirements and put together an execution plan that includes discovery, design implementation, migration testing, and rollout. We believe in an iterative approach that enables you to see results fast. A phased approach also helps you see wins more quickly, and builds project momentum.

For more information, please contact MondayCall at [sales@mondaycall.com](mailto:sales@mondaycall.com). We’ll be happy to discuss your needs and our experience.



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