



CASE STUDY: KYMETA



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– Alisa Garcia,
Senior Director of Sales Operations,
Kymeta



KYMETA FUELS SUCCESS WITH SALESFORCE SOFTWARE AND RSM SOLUTIONS

Ongoing Salesforce optimization strengthens Kymeta's key processes

Aggressive-growth companies have many critical decisions to make as they expand. They must adapt their processes and technology to respond to market conditions and must make strategic choices that will help them gain a competitive advantage. However, high-growth companies often have limited bandwidth to hire experts in every function of their business outside of their core focus. Successful companies understand that gaining capabilities quickly and effectively in the areas that support their core business can help them execute toward their goals.

Kymeta is a fast-growing technology company that develops mobile antennas that provide satellite and cellular connectivity, as well as services and digital tools to satisfy the growing need for global ubiquitous high-bandwidth connectivity.

The company was founded in 2012 and began bringing products to market in 2017. Kymeta purchased Salesforce as an initiative led by the sales team with the intention of developing an overarching sales road map. While the company implemented the platform internally, stakeholders eventually understood they could gain better user adoption and utilize more functionality by working with an experienced external advisor.

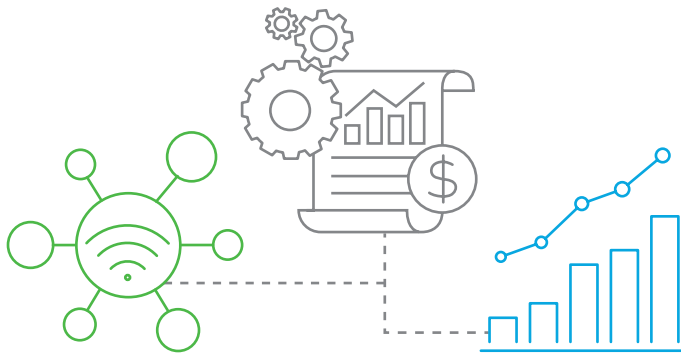
Optimizing the Salesforce environment

Kymeta's relationship with RSM started with projects on a tactical basis—Kymeta contacted RSM when an issue or potential Salesforce project arose. However, the relationship

has grown over time, with RSM becoming a more comprehensive, trusted Salesforce advisor to the company.

Initially, Kymeta brought RSM in to improve the implementation of and bring best practices to Sales Cloud, but several additional Salesforce cloud products have since been leveraged to enhance analytics, improve efficiency and support growth across the business.

"I always describe our relationship with RSM as what you (as a business leader) always want—that true partner," says Alisa Garcia, Kymeta senior director of sales operations. "RSM is not a vendor that I have to really manage hard to ensure they are delivering to spec. The RSM team is constantly going above and beyond."



Product configuration and quote management

Kymeta sells very flexible satellite/cellular terminals with customizations for hundreds of different applications and connectivity plans. As a hardware manufacturer with optional services and connectivity offerings, Kymeta needed a way to track hardware demand forecasts for its factory and supply chain as well as to issue complex quotes. RSM recommended Salesforce CPQ for more powerful sales quoting processes and functionality. Kymeta agreed, leading to the development of a "wizard" format that allows for the capture of all required features in a quoted configuration based on a customer's needs.

Further, Kymeta initially used the out-of-the-box quote functionality, but required additional terms for complex quotes based on products or configurations, inclusion of technical product information with quotes, and multiple templates for internal business units (military and civilian). To meet those needs, RSM leveraged CPQ to create a variety of quote templates, as well as a process for integration of necessary technical information and the automatic addition of documents based on selected products.

"RSM has been our savior," says Garcia. "Since we implemented CPQ, we've probably changed our product catalog, options, rules, etc., a million times. But they understand the Kymeta environment, and they can speak so helpfully to what we should do and best practices, and work out solutions considering all of the other things we've deployed."

Product life cycle and price book management

Kymeta also understood the need for enhanced product life cycle and price book management. As the company grew, information was kept in disparate systems without change control or history tracking. Frequent product and price changes required manual email approval processes. After meeting with the Kymeta team, RSM brought all the information and processing for products and pricing into Salesforce, creating a flexible platform that can accommodate continuous changes by multiple team members.

Contract generation

Due to its channel-model structure, Kymeta works globally with a multitude of resellers. Contract generation was a time-consuming process for Kymeta, with documents created manually and in numerous formats, without a defined format in place. Kymeta researched contract management software and requested RSM's assistance with implementing Conga Contracts and Conga Sign. RSM configured the applications within Salesforce, with consistent templates for various types of contracts, defined processes to maintain and create additional templates, and the efficiency of e-signature functionality for improved transaction times.

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– Christian Miller,
Senior Program Manager, Kymeta

Asset and case management

With growth, Kymeta required a more robust solution to track and manage assets, warranty coverage and customer service requests. Its methods of tracking history and correspondence were generally manual and required enhancements to accommodate increased volume and demand.

From an asset perspective, RSM introduced Kymeta to the asset management features available within CPQ. Using standard functionality, Kymeta tracks which hardware goes to which destination, and with customized functionality provided by RSM, Kymeta can track details of return merchandise authorization replacements and warranty expiration dates.

At Kymeta, customer support was initially tracked in a homegrown application that lacked visibility to other departments and scalability to align with the growing business. After discussions and demos with RSM, Kymeta decided to take advantage of Salesforce Service Cloud. Now, Kymeta can see the history of cases, including related communication and the resolution, with enhanced visibility into organizational performance through the creation of intuitive reports and dashboards.

Order management and ERP integration

As Kymeta continued to grow, creating orders in Salesforce and integrating them with its ERP system became a significant requirement. The company needed to push order details back and forth between the two platforms. RSM analyzed the order functionality available in CPQ and collaborated with Kymeta and other Kymeta vendors to design a solution that met Kymeta's integration needs.

Marketing automation

Kymeta recently required advances in its marketing automation capabilities to align with business expansion and sought detailed analytics and lead routing for campaign creation. Synchronizing data between Salesforce and the legacy email solution was fraught with problems, including duplicate records. After consultation with RSM, Kymeta selected Salesforce Marketing Cloud Account Engagement powered by Pardot, a native solution fully integrated with the other Salesforce cloud products. As part of RSM's implementation plan, demos and tutorials were developed that helped the marketers get more comfortable with the solution and supported long-term success.



Growing the business

In 2020, Kymeta acquired Lepton Global Solutions, a provider of satellite-based communications services and solutions, which maintained its own instance of Salesforce without a number of the features implemented in Kymeta's instance. Additionally, the acquisition sold different products and solutions that required dynamic and custom product descriptions at time of quoting. With relative ease, RSM seamlessly incorporated the new offerings into Salesforce CPQ and the Kymeta teams continued providing quotes without interruption. The merger of data and processes allows Kymeta to provide stronger, broader network coverage and global customer support to all its customers.

Educating internal stakeholders

Education was one of the most important facets of the continued rollout of Salesforce functionality throughout the organization. Until Kymeta engaged with RSM, users learned by exploring the Salesforce platform on their own and did not know that so many of their business processes could be completed within the system. Once engaged, RSM connected with key stakeholders and educated them on the power of Salesforce Customer 360 based on the team's broad understanding of the platform and how it could strengthen internal processes. The Kymeta champions then took the lead to spread the word across the company, resulting in improved user adoption.

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Overcoming challenges

As with most initiatives, bumps in the road occasionally occur. Kymeta and RSM have understandably encountered a few challenges when expanding the use of Salesforce through the years.

RSM provided guidance to Kymeta when company processes went against established best practices. In one instance, Kymeta's cloud team was performing integrations in Salesforce with code that RSM determined was suboptimal and suggested that Kymeta take a closer look at it.

"I appreciated that," says Garcia. "It was a difficult discussion, and we learned on both sides. We made the intentional decision to move forward in some cases and make the changes based on RSM's recommendations in other cases. But I valued RSM's contributions."

Another challenge: Kymeta follows best practices and uses multiple environments (sandboxes) to test and deploy system changes. When team members were asked to perform user acceptance testing, there was occasional confusion about when and where—that is, in which sandbox—the testing should take place. RSM and Kymeta heard the testers' concerns and in response developed a more effective communication plan and testing instructions.

"We are trying to finesse that important quality assurance process and make it more streamlined," says Garcia. "I think we have a much better approach now."

A maturing relationship

After a couple of years of the ad hoc work with RSM to make improvements within the Salesforce platform, Kymeta entered into a more comprehensive services relationship with RSM. Instead of ramping projects up only when potential improvements are identified, Kymeta now has a preestablished schedule of hours per month for working with RSM. The new framework is more conducive to outlining a long-term road map, identifying new opportunities and acting quickly upon them, all with a predictable budget.

While the RSM services agreement has a defined scope, it is also flexible as needs arise.

"RSM has been very accommodating about how we structure our statement of work," says Garcia. "It's great to have the flexibility RSM offers, as well as the partnership."

The road ahead

In addition, RSM conducts quarterly reviews that provide observations and suggestions for potential improvements within the company. These discussions cover a broad spectrum of potential changes, from subscriptions and billing to new products and options, and include evaluation of current deployment methods to determine if any adjustments are necessary to meet future demands.

"The brainstorming sessions and collaboration have been very helpful," says Christian Miller, Kymeta senior program manager. "RSM likes to dive into the details, and I appreciate that because it helps us understand what they are building for us. Other vendors may tend to hand-wave about how they will solve certain problems. Then we may not understand what we are getting, and when we get it, it may be something completely different from what we want. I appreciate that RSM likes to dive deep and walk us through what they are building or changing."

As Kymeta has steadily grown, the company has transformed many of its key business functions, with Salesforce as the foundation of that progress. While the initial Salesforce implementation was driven by the sales team and focused on the Salesforce Sales Cloud, after several years of working with RSM, the company has also taken advantage of advanced functionality within Salesforce CPQ, Conga Contracts for Salesforce, Salesforce Service Cloud, Salesforce Revenue Cloud and Marketing Cloud Account Engagement powered by Pardot. Kymeta now has more efficient systems, leading analytics capabilities and scalable processes to fit the company's needs both now and into the future.

"We would not be successful without our partners on the RSM team," comments Garcia. "The people at RSM know our environment, and they are excellent at maintaining consistency and ensuring any new people understand our products and structure. The mindset is always that we are one team together making Kymeta successful in Salesforce."

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