Edmentum is an innovative company specializing in creating individualized, online learning opportunities. Its operations currently cover interconnectivity with over 8,000 school districts and nearly 14 million students.

Most of Edmentum's staff uses Salesforce, including 400 full users and about 250 chatter-only users. Everything from sales, marketing, services, and support is run through Salesforce. This works out to a database of, "a couple million contacts and 350,000 accounts" according to CRM Success Manager Leyna Hoffer.

Needless to say, interfacing with such a large user base while experiencing steady growth over recent years has proved to be a difficult challenge for Edmentum's IT team.

What are the top three Salesforce-related challenges faced by Edmentum?

The top challenge isn't unique — which doesn't mean it's not vital. "It's been true no matter where I worked. Keeping the data clean and current," explains Hoffer. "If you have more than 100 people in your database, then the next day something is going to be wrong with your data because everything changes so often."

After that primary concern, keeping tabs on which fields are actually useful and should be kept active and ultimately ensuring that end users have a positive experience are the next priorities. "Another thing is keeping the page layouts and the number of fields we have manageable because, in addition to the fact that our org is very large and complex, it's also been around for 10-plus years," Hoffer notes. "So, we have had a lot of cooks in the kitchen over the years and there are a lot of fields and things that were created in good faith but never got used or didn't have descriptions with them. We had a lot of people that weren't necessarily system administrators for Salesforce that had sys-admin rights."

Before Snapshot, how did Edmentum deal with these issues?

Before diving into Snapshot's diverse and powerful toolbox, Hoffer and her team depended on a combination of less powerful third-party tools and a great deal of manual, time-consuming updating.

"A lot of it was eyeballing, especially keeping the page layouts and the amount of fields manageable," she relates. "Sure, we could run some Salesforce reports, but then we would have to export those and manually go through each one to figure out what made sense to keep."

There's no shame in using the word "tedious" to describe much of this work. And "vital" too. "I'm a big nerd when it comes to cleaning up things, cleaning up the database and making it as sparkly clean as it can be," Hoffer admits. "So, while the tasks themselves are tedious and a bit mind-numbing, sometimes the end result is something we celebrate."

Given that Hoffer oversees ongoing, monthly, and annual audit programs — that seek to determine which objects need optimization, enhancement, or deletion — that meant a lot of eyeballing. In fact, an early project that occurred prior to getting to know Snapshot entailed needing to de-dupe/merge over a million duplicate contacts. Yikes.

And after Snapshot?

Hoffer's blunt take is, "Until Snapshot, we weren't really able to pull it all together into one place."

The Snapshot features palette creates the ability to see the entire field of play (yes, all those fields scattered far and wide). According to Hoffer, the data dictionary feature "blew my mind because we spend hours and hours and hours putting together our data dictionary for each object. And with basically a click of a button, we are able to print out a fairly comprehensive data dictionary within minutes — instead of days and days of trying to put it together manually."

Other features that streamlined the process at Edmentum include using forgotten assets to clean up email templates, comparing record types versus picklists, being able to look at record-level security in one comprehensive report, and the profiles and permissions set to track down why certain individuals have access to certain areas (and then decide whether they should).

What has Snapshot saved?

Time. And aggravation. Meaning money.

"It's hard to quantify the cost but in data dictionary creation alone I know that it has saved us numerous hours. Days worth of work is being saved by having that data dictionary," says Hoffer. "Over the course of each object, it's probably weeks or even months over the course of a year. I mean, an object could take — I'd say 15 to 20 hours the way we were doing it before. Now it's like 5 or 6 hours."

This frees up significant resources for Hoffer's department, creating the kind of maneuverability and efficiencies that admins covet.

"The operation audit tasks are ones that, to the business, don't look like important tasks. But to us, as admins, we know that it's ultra important to keep the database clean and manageable,"

she explains. "To the business, they don't see it — so the operational tasks are always the ones that get pushed. The priority for something that is end-user faced. We can now fit our operation-audit tasks in more than we could in the past because they take less time. So, in between the other projects that we are getting bombarded with, we can fit in 5 or 6 hours to do an audit on an object when before we couldn't because it would have taken 15 to 20 hours."

What's the takeaway?

"There is always this kind of divide between admins and developers. The tools that are provided to us, well, we often think, 'this tool is an admin tool or this tool is a developer tool,'" explains Hoffer. "There are very few that encompass both, that admins and developers can feel they can use equally." And ultimately, this leads to a better customer experience, which is any business's true bottom line.

"Being able to do the cleanup that we are able to do with Snapshot — an end user wouldn't know it's Snapshot that is helping us out or that it's Snapshot that is making it easier for them," concludes Hoffer. "But we know that keeping it clean, keeping the page layouts looking the way they should, taking fields off that aren't really being utilized or are just causing technical debt — we know as admins that this is going to increase the use of Salesforce because it's just a better product put out to the end user."