



OptionsSwing :: Case Study

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OptionsSwing

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OptionsSwing is one of the fastest growing Educational Options Trading Communities. With over 2,200+ subscribed members choosing to renew with them monthly, it takes a team of people to deliver the content and services customers see every single day. OptionsSwing created a Discord server to allow for members to interact seamlessly with the Founder and CEO, Jason Lee, JIM, and six different mentors.

Challenge

- Salesforce recommended SM Innovations to OptionsSwing directly, citing SMI's deep industry experience within Financial Services, to finish an incomplete implementation begun by a different Salesforce partner.
- OptionsSwing was trying to become among the first to monetize myTrailhead through a subscription-based Options Trading Education product called "OS Academy", which utilized Salesforce communities, Stripe, and Blackthorn.io's managed package.
- OptionsSwing urgently needed the implementation issue resolved, as they had already incurred significant overhead in fees and implementation costs without the ability to go live, with hundreds of paying clients waiting to use OS Academy.

Solution

- In addition to finally completing the payment gateway and enabling one of the first successful monetizations of myTrailhead, SM Innovations discovered that the previous Salesforce partner had incorrectly selected the Trailblazer.me subdomain when setting up the OptionsSwing Trailhead org, which blocked users' ability to log in successfully.
- At the time, there was no way to switch the subdomain from Trailblazer.me to Salesforce ID, which was necessary to meet the requirements.
- In order to resolve the final issue, SM Innovations collaborated with various Salesforce resources to fix OptionsSwing's problem: the primary Salesforce FINS AE, Salesforce myTrailhead AE, Salesforce Senior Manager of Trailhead Support Technical Operations, and Salesforce Trailhead Director.

Outcome

- With the help of the aforementioned Salesforce team members, SM Innovations was able to push forward a myTrailhead product update which would allow customers to switch from the Trailblazer.me subdomain to Salesforce ID without losing any data in the org.
- OptionsSwing was finally able to go live with its OS Academy product after a near six-month launch delay, and the client was elated to see customers signing up and paying for subscriptions.

About SM Innovations

SM Innovations is a Salesforce consulting partner company based in Los Angeles. We are a tenacious group of ex-IBM digital strategy consultants, world class engineers, and highly talented designers, who set out to do what we love most – build premier quality, robust Salesforce applications. We pride ourselves on providing enterprise-level professionalism and delivery for every client and strive to build long-lasting relationships driving continuous success and innovation.