



## Klover :: Case Study

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# Klover

## Klover

Klover is a financial technology company whose goal is to democratize access to modern financial services by leveraging users' permissioned data. Their business model involves offering interest free micro loans to consumers and generating revenue from advertisers on their platform. Thousands of customers have already saved hundreds of dollars and ended up in a better place financially. Founded by a team of ad-tech veterans on a mission to help the consumer, Klover is poised for success.

## Challenge

- Salesforce recommended SM Innovations to Klover directly, citing SMI's deep industry experience within Financial Services.
- Klover had just secured a \$60 million Series A funding round and had immediate plans to set up their Salesforce organization as fast as possible, in order to scale out their sales team to meet their aggressive revenue goals.

## Solution

- SM Innovations worked closely and efficiently with the primary stakeholder to organize and migrate a full-scale opportunity pipeline, accounts with agency and brand hierarchy parent requirements, and contacts with proper account association pulled from MediaRadar.
- SM Innovations also created a custom opportunity workflow with Products, Flight Dates, Amounts, and an Opportunity Scheduler to accurately track and report on Klover's unique deal structures.

## Outcome

- Considering the strict investor timeline to meet the revenue needs, SM Innovations executed a Quickstart package to bring the Salesforce org online in a timely manner, and customize Salesforce to accommodate Klover's unique business approach
- As a result, the sales team were able to leverage their Salesforce org within a matter of weeks of engaging SM Innovations with plans for expanding their Salesforce footprint in the near future.

***"Seamless execution. Great partners in Salesforce success!"***  
*- Brandon Ricciardi, Klover CRO*

## 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.