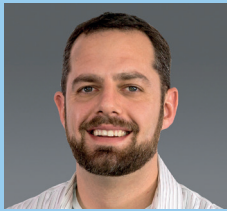
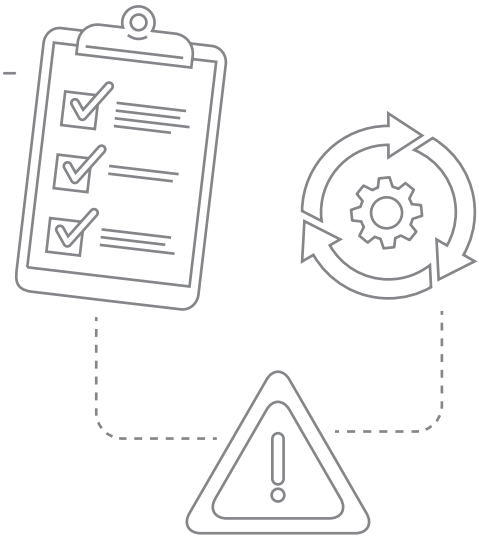


## CASE STUDY: A COLLABORATIVE APPROACH TO FRONTLINE'S BUSINESS TRANSFORMATION



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Martin Sachs,  
director of Frontline's  
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### OVERVIEW

Following their acquisition by a leading private equity firm in 2017, education technology company Frontline—which develops administration software tailored to K-12 leaders—had to prepare their systems for the business to triple in size. To accommodate this growth, the company embarked on a large-scale digital transformation, which required significant business changes and technology optimization projects. That work included moving the company's renewals process from NetSuite to CPQ, integrating Salesforce's configure, price and quote software; implementing Avalara tax software; optimizing the use of Workday Adaptive Planning; and implementing a business intelligence strategy and data warehouse.

Being on the cusp of so much acceleration was an exciting time for Frontline. But the company—a leader in North America's K-12 ed-tech space, providing more than 10,000 clients with back-office solutions that help school leaders with recruitment, hiring, tracking absences and time, and professional development—also had to find a trusted advisor that could help the business navigate this rapid change.

Frontline originally selected RSM to assist with the NetSuite scope of the project. During the initial NetSuite assessment phase, Frontline felt RSM's team deeply understood the business and gave the firm the opportunity to lead the entire end-to-end business and digital transformation, which involved operationalizing the business model through various enterprise platforms.

This business transformation project in late 2019 and 2020 involved:

- Five major workstreams and over 50 professionals across Frontline and RSM cohesively working together
- The implementation of four major software platforms and several add-on platforms within a 10-month period

- Developing cross-functional teams at Frontline, including sales, sales operations, finance, IT, professional services and customer success
- Convening a cross-functional leadership team to make key decisions for the enterprise

Since the work concluded, Frontline has conducted several seamless acquisitions without the help of a third party, says Martin Sachs, director of Frontline's project management office and enterprise applications. The company is now processing far more revenue through their new systems, which would not have been possible prior to the transformation without increasing head count significantly.

## A cohesive team

Frontline's products allow school districts to more efficiently track teacher absences and substitute-teacher information, and enable professional development, recruiting and hiring, enterprise resource planning and more. The massive disruption the pandemic wrought on school districts everywhere only underscored the importance of districts having effective management systems like these in place.

The company's business transformation project involved several unique nuances, given the fact that Frontline's customers are K-12 school districts—often these entities are accustomed to submitting purchase orders rather than signing contracts, for instance, and payment enforcement is also atypical in the education space.

RSM's deep understanding of the technology industry—with its wide range of sectors and business models—allowed its team to get up to speed quickly, understand how these differences affected the project and develop solutions tailored to the business. That work included:

- Putting infrastructure in place to allow for scalability
- Determining the appropriate way to bundle and operationalize products
- Designing an effective renewal process
- Developing a method for better forecasting renewals, allowing Frontline to manage annual recurring revenue growth with more precision
- Rebuilding the architecture operating around Salesforce and NetSuite to optimize the user experience and properly leverage investments
- Understanding key performance indicators and business performance measures and developing a business intelligence infrastructure to enable improved self-service reporting and drive faster access to business insights
- Redesigning certain business processes, such as Frontline's approach to presenting quotes and orders

to customers, to provide greater transparency to customers and avoid billing concerns

- Providing a project management office function to create visibility to the executive leadership team and board on the deployment of capital to this project

What resonated most with Sachs throughout this project was the collaborative spirit of RSM's team, which ultimately allowed Frontline to "control its own destiny," he says.

"I've done several of these projects, where you have the weekly meeting with a vendor and they come back and say whether something is impossible or possible, and you kind of just accept what they're saying," Sachs says. "But you aren't involved in it, and so you're running a little bit blind. And many vendors object to co-development."

But that wasn't the case with this project, he adds. Frontline received direct communication, visibility and involvement not just regarding how RSM's team was performing various aspects of the implementation work, but also why team members chose the approaches they did.

"All vendors sell change management from a training perspective, but RSM was just very accommodating, and we didn't even have to ask," says Sachs. As a result, the project felt like it was being run by a cohesive team rather than a business with an outside advisor.

"I would have 100% trusted RSM alone in a room," says Sachs.

## Solutions and results

Frontline wasn't just navigating a business transformation project during this time; four weeks before their new systems deployed, the company acquired a holding company with five entities underneath it. Because the work RSM had done to that point involved a deep understanding of Frontline's business and client base, RSM teams were able to help with that transaction as well.

The Friday before the company's new systems were set to go live, Frontline gave employees across several business functions the day off so their team and RSM's team could work together on the final 36-hour push to the finish line. That required navigating last-minute questions and curveballs, all of which got worked out so the systems could deploy smoothly at 8 a.m. the following Monday.

After that successful deployment, the company extended their work or initiated new projects with RSM in several areas, including services related to the PMO function and data warehouse support. Since the business transformation work finished, Sachs says, Frontline has nearly doubled in size and completed seven more acquisitions without the help of outside vendors—without any hiccups.

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