



How Fullcast Helped Collibra Improve Collaboration and Slash Planning Time by 30%

INDUSTRY:
DATA MANAGEMENT

PLATFORM:
SALESFORCE

USE CASES:

- Territory Segmentation
- Data Hygiene
- Plan & Collaborate

Executive Summary

Through dynamic collaboration, data management, and alignment across all GTM roles, Collibra successfully implemented a completely new segmentation model.



Collibra



300+

person GTM
team aligned
through
platform



30%

decrease in
time spent on
territory
planning



2-3
meetings

saved by each
frontline manager

The Company

Collibra is a data catalog platform and tool that helps organizations better understand and use their data assets. They currently have over 500 customers and are continuing to grow to serve the world's largest corporations. With a go-to-market team of over 300 people, they required a powerful platform to align and manage resources.

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If you want manager input on your territories and you're a business of any size, you pretty much have to have a tool like Fullcast.


CLAY BLANCHARD,
VICE PRESIDENT OF SALES, COLLIBRA

The Problem

Collibra sells to the world's largest public companies, so they have a clearly-defined total addressable market (TAM). However, historically, Collibra had not focused on segmenting their sales territories. But for FY22, they decided to implement a more robust TAM and segmentation model to make best use of their resources.

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“We did not have any segmentation previously. Trying to deploy a new segmentation model can be challenging. It starts with the hard work of scrubbing the data and then coming up with the right framework to organize the coverage model in a way that is relevant to your business,” explained Clay Blanchard, Vice President of Sales Operations. Collibra builds territories using a named-account approach, which allows them to be very precise with how they serve the large enterprises that they sell into.



In addition to the need for more precision in their segmentation, Collibra wanted more involvement from front line sales leaders in the territory building process. Prior to using Fullcast, Field Ops used spreadsheets for territory planning and assignments. They found that relying on spreadsheets not only limited the accuracy of their model but hampered crucial dialogue between the Ops and the frontline sales managers. Gathering feedback required multiple meetings with each manager, who were already pressed for time. Altogether the team spent upwards of 90 hours during planning season reviewing plans which is significant to a sales organization.

As they began to develop the segmentation model, they realized that data quality was also an issue. This complicated their planning, since inaccurate account data leads to poorly-designed and ineffective segmentation and coverage models.

The Solution

Collibra chose Fullcast because they realized the importance of having a single platform that is dedicated to go-to-market planning and execution. The ability to gather bottoms-up feedback directly within the platform is one of the biggest value adds. Further, they valued the ability to use a solution that would align all GTM roles (not only for sales but also for customer success, sales engineer and BDR alignment).



Onboarding

Collibra had a tight timeline to get the platform synched with their system before they needed to begin actively planning. Their operations teams worked closely with their Fullcast business partner, and they were able to get up and running in about six weeks.

The Power of Transparency

With his previous experience scaling enterprise operations, Clay knew the importance of providing visibility and transparency into the carving process. He also wanted the ability to quickly see data on territory performance.

“As an ops practitioner, Fullcast allows you to quickly traverse the entire account hierarchy to review relevant metrics and tag any data quality issues.” Within Fullcast, managers are also able to flag crucial data issues for review.

As they worked on the segmentation, they were simultaneously able to utilize Fullcast’s Data Desk service to perform data work. Further, they found that Fullcast allowed them to view their account data in ways they couldn’t with their CRM. “It’s not that Fullcast was really designed for data quality work, per se, but the view it gives makes it easier to work through data quality more systematically. You find subsidiaries that aren’t in the right hierarchy as an example, and you can tag all these things with notes, which is super handy. And it’s not something that the CRM is really designed to do.”

Efficient Collaboration

Fullcast also closed gaps between the Ops and Sales teams by enabling efficient collaboration. Collibra started their planning process in Fullcast with the sales operations and strategy team, carving territories according to their new segmentation criteria. After this phase was completed, they passed the first version of the plan to the Sales managers.

Clay points to the importance of getting this bottoms-up feedback as part of a territory planning exercise. “If you didn’t include the managers, you would have territories that are just the algorithmic version with no input. And I believe those would be inferior in quality and thoughtfulness to territories that include manager input, especially for us given our focus on large enterprises where the numbers may not tell you everything about an account.”

Their managers were able to easily view the new territories in Fullcast, see the balance on metrics, and add their input based on intelligence from field reps. This saved their team significant time and also made the sales reps and managers more receptive to the new segmentation model.

The Results

Fullcast enables Collibra to take a revenue operations approach for all of their go to market resource alignment. Leveraging Fullcast, their lean ops team successfully delivered a higher quality process and GTM alignment output.



The Fullcast platform was central to Collibra's ability to run a collaborative yet efficient planning process, giving them tangible time savings. Clay notes, "Frontline managers are the ones who are doing the territory work, and they're the single most stretched resources in almost any sales organization. So it's really important to save time for them to make things easy."

Fullcast allowed managers to quickly and visually see how their territories are laid out so that they can easily make any required tweaks. They also were able to save 2-3 meetings per manager due to the ability to give feedback directly in the Fullcast app.

Through the feedback process that Fullcast enables, Collibra created high-quality territories for all of their reps. The managers are also able to keep an eye on their territories and KPIs, so they can make tweaks as needed.

Fullcast has helped Collibra develop a repeatable and scalable approach to territory segmentation and territory management. “The speed of the process and the quality of the output are the two biggest benefits.”

Collibra is currently in the process of operationalizing their annual finance number and updating their segmentation accordingly. They look forward to leveraging other aspects of the Fullcast platform. “I know that Fullcast has capabilities with respect to governance of your account data quality. It’s a capability we’re very interested in because it’s a challenging problem to solve.”

Want to get similar results for your organization?

Fullcast’s territory management software gives you all the tools you need to streamline sales planning processes and boost revenue from the ground up.

To see Fullcast in action, book a risk-free demo at fullcast.io.