

fullcast.io Case Study: Okta

How Sales Leaders Can Scale Growth and Empower Sales Teams By Assigning Account Hierarchies and Creating Data Policy.



CLIENT: Okta

Industry: Computer Software, Identity Management

Location: San Francisco, CA

Company Size: 1,600 employees

Company Bio

Okta, Inc. is a publicly-traded identity management company based in San Francisco. It provides cloud software that helps companies manage their employees' passwords by providing a "single sign-on" experience. It was founded in 2009.

"Creating a vision around our top accounts that have a complex hierarchy structure is now a more robust GTM motion. Fullcast.io gave us the confidence to create balanced territories using the most up to date data possible." - Amy Lin

The Challenge

When fullcast.io first partnered with Okta, their sales team was expanding rapidly. However, they lacked the operational headcount and resources to build effective Salesforce processes, standards and policies to support scale. This created ambiguity around forecasting as a SaaS business. Given the acceleration of growth, sales reps were unable to enter and track data effectively, which led to inaccuracies and missing information across accounts. Okta needed to implement a solution to support Okta's business growth with a strategy that would bring clarity to forecasting for sales leaders, mitigate data errors, and empower sales reps to meet and/or exceed their quotas.

“Now that we have a review process for accounts, we can ensure the quotes we assign are reasonable since we are much more careful around the policies we put in place for entering net-new data and cleaning up current account data in the system.” - Amy Lin

The Outcome

By creating account hierarchies, sales managers were able to improve their account planning, recognize the longer runway for accounts, and understand how much space was left in the enterprise landscape. They were able to evaluate policy around current data and net-new data to drive decisions that guaranteed the quotes assigned were reasonable, which in the long run ensured reps felt empowered and set up to win.

The Solution

At fullcast.io, we recognize that each business is unique - so we partner with our customers to align on priorities. Okta was in the midst of building territories, so we first created and assigned account hierarchies. Clean data and accurately assigned account families resulted in Okta having more confidence in their GTM plan. To ensure high-quality data standards moving forward, fullcast.io established a data governance policy around clean data and set rules around account creation. fullcast.io's data flagging system allows Okta to review account data inadequacies in real-time. Okta utilizes fullcast.io's CRM Data Desk service, which dramatically cut down on hours of manual work.



About Fullcast.io

fullcast.io delivers a software platform that allows organizations to close and align the sales go to market planning cycle with the daily motion of sales execution. Organizations and leadership teams using fullcast.io benefit from:

- Integrated and collaborative, top down and bottom up sales go to market planning.
- Tracking plan versus actual in real-time to course correct for “plan drift”.
- Speed and agility to keep the day-to-day sales execution motion aligned with the dynamic nature of an evolving and changing go to market.
- Planning and execution aligned without IT overhead, excel version control and data loads.