



EXECUTIVE SUMMARY

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



300+

PERSON GTM TEAM
ALIGNED THROUGH
PLATFORM



30%

DECREASE IN TIME
SPENT ON TERRITORY
PLANNING



2-3 MEETINGS
SAVED BY EACH
FRONT-LINE MANAGER

CASE STUDY

Collibra Improves Collaboration and Slashes Planning Time by 30%

Using Fullcast, Collibra implemented a new territory segmentation model while improving collaboration and slashing territory planning time by 30%.

THE COMPANY

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

THE PROBLEM

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

"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 it to be very precise with how it serves the large enterprises that it sells to.

In addition to the need for more precision in its 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 also hampered crucial dialogue between the ops and the front-line sales managers. Gathering feedback required multiple meetings with each manager, each of whom was already pressed for time. Altogether, the team spent upward of 90 hours during the planning season reviewing plans, which is significant for a sales organization.

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

THE SOLUTION

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



Onboarding



The Power of Transparency



Efficient Collaboration



1 ONBOARDING

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

2 THE POWER OF TRANSPARENCY

With his previous experience scaling enterprise operations, Blanchard 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,” he says. 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,” Blanchard says. “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.”

3 EFFICIENT COLLABORATION

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

Blanchard points to the importance of getting this bottom-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,” he says. “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.”

Collibra’s 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 the team significant time and 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 its go-to-market resource alignment. Leveraging Fullcast, Collibra’s 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 it tangible time savings. Blanchard notes, “[Front-line] 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 two to three 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 its 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,” Blanchard says.

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



I would argue that without a tool like Fullcast, you cannot efficiently manage a collaborative territory planning process for an organization of any scale. . . . With Fullcast, we’re trading internal meeting time for customer-facing time.

Clay Blanchard
Former VP of Sales Operations

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.

On average, Fullcast clients receive the following:

90%

Decrease in implementation time

25%

Increase in sales team satisfaction

30%

Increase in quota attainment

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

(949) 813-0182

2223 S. Highland Drive
Salt Lake City, UT 84106