



Equitable Territory Planning with Fullcast

How Fullcast Helped Iterable Increase Efficiency and Drive Growth

INDUSTRY:
GROWTH MARKETING

PLATFORM:
SALESFORCE

USE CASES:

- **Equitable territory allocation**
- **Expedited go-to-market planning**
- **Automated data cleansing**

BREAKDOWN

Executive Summary

With the goal of segmenting territories equitably among sales reps, Fullcast helped Iterable create a process to optimize sales planning and increase productivity.

Fullcast played a major role in boosting efficiency for Iterable, resulting in:



20%

More pipeline created

60 Days

To territory plan rollout

1

Month saved

3x

Increase in productivity

The Company

Iterable is a cross-channel marketing platform that powers unified customer experiences and empowers you to create, optimize and measure every interaction across the entire customer journey.



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If you're growing and scaling a field-facing organization and you're running revenue operations, you'll benefit from having a team like Fullcast that really understands the intricacies of the go to market motion to support your operations team and process.

DAVID ZWERIN, SR. SALES OPERATIONS DIRECTOR,
ITERABLE

The Challenge

Iterable's sales reps were allowed a certain number of accounts based on geographical data (which were assigned within Google spreadsheets), but there was no way to ensure equitable territory assignment.

This led to an environment in which sales managers within the same geographical area would fight for the best accounts.

Since most of the work was being conducted manually through spreadsheets, there was no way to ensure that the data that informed territory assignments was clean or accurate. This made it even more difficult to create a workflow in which leads could be assigned fairly with minimal human intervention needed.

In addition, Iterable was working toward a goal of doubling the size of their organization within the next year. They needed to find a way to streamline territory assignment and clean up data in a way that would allow them to meet their growth goals.

The Strategy

Fullcast solved Iterable's challenges by providing:

- **Visual Territory Planning**

"I was looking for something to visually show me how we can create an equitable distribution of territories randomly, but also strategically," says David Zwerin, Iterable's senior director of sales operations.

Fullcast's visual territory segmentation tool enabled the Iterable team to assign territories in an equitable and transparent way, resulting in an environment where all sales reps would have equal opportunities for success.

- **Automated Territory Assignment**

Without a way to automate the assignment of territories to sales reps, Iterable's sales operations team would have to spend resources manually assigning accounts and performing the resulting necessary spreadsheet updates.

Fullcast allowed Iterable to free up resources by automating the assignment of territories based on a predetermined set of rules set by the sales operations team. This allowed the team to focus their attention on driving growth instead of performing tedious tasks.

“The time invested in account changes and updates was a significant portion of the ops job,” says Zwerin. “With Fullcast support and nightly sync, we got essential time back and a huge savings from an operational burden.”

- **Data Cleansing**

“While we could operationally create a platform for creating territories, it still required a lot of human touch to see whether or not these accounts were actually the right accounts,” says Zwerin. “Sometimes the system doesn’t catch bad data, and something might not be accurate.”

Without accuracy checks in place, a simple spreadsheet error could have rippling ramifications throughout Iterable’s entire sales operations infrastructure. Fullcast provided guardrails to ensure that all data collected would be accurate and any duplicates would be removed.

- **Faster Go-to-Market**

Thanks to Fullcast, Iterable was able to drastically cut the time it took to develop and launch a territory plan down to a 60 day rollout.

According to Zwerin, “Our leadership team said, ‘This is the most amazing rollout of territories the organization has ever had.’”

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**.