Next-Level Territory Planning with Fullcast

How Fullcast Helped OwnBackup Optimize Sales Operations

INDUSTRY:

DATA MANAGEMENT

PLATFORM:

SALESFORCE

USE CASES:

- **Territory Segmentation**
- **Lead Routing**
- **Account Hierarchies**

Executive Summary

With the goal of improving overall productivity and efficiency, OwnBackup turned to Fullcast to figure out how to generate more output that would convert into revenue.

Own{backup}

62%
Projected sales team growth

30%
Decrease in time spent on go-to-market

$100,000+
Dollars saved by not hiring an outside strategist

2.5x
Improvement in overall productivity

The Company

OwnBackup enables customers to protect their data through automated, secure backups, advanced comparison tools, precision recovery, easy sandbox seeding, and comprehensive archiving features.

> " (Fullcast is) the only tool out there that seems to be tailor-made, building functionality and features that will help an ops team specifically. And having been built by people who have run operations teams at scale, they know the common problems that we face.
>
> SCOTT MALISH, VP OF SALES AND MARKETING OPERATIONS, OWNBACKUP

The Challenge

OwnBackup needed to figure out how to tactically carve up territories in a way that would give its sales reps defined, predetermined territories to prospect and find new accounts within.

Their current method of assigning territories was highly manual, and not future-proof. However, the task was proving to be logistically challenging.

"We needed to solve a problem regarding how we manage our territory, as territories are a critical part of our go to market strategy," explains Scott Malish, VP of Sales and Marketing Operations at OwnBackup.

In addition, OwnBackup was seeking ways to improve productivity and efficiency as the company looked to scale operations as a larger picture goal.

The Strategy

Fullcast helped OwnBackup meet their territory segmentation goals and increase productivity by providing:

Equitable Territory Assignments

Using Fullcast, the OwnBackup team was able to create a framework in which territories could be defined and subsequently assigned to the correct sales reps based on predetermined criteria.

This gave them a way to consistently execute on and operationalize territory segmentation within a single platform, which allowed them to move beyond their previous method of manually managing and assigning territories.

Automated Lead Routing

In addition to solving territory segmentation issues, Fullcast has allowed OwnBackup to free up even more time by automating lead assignment.

"When leads come in, Fullcast helps us route to the right person based on territory definitions and various other dimensions of leads," said Malish. "We just rolled out lead-to-account matching, which will solve a lot of issues that we had without that functionality."

Definable Account Hierarchies

Fullcast enabled OwnBackup to work toward the creation of an account hierarchy system in which new ideal customer profile (ICP) accounts are added to the system and automatically assigned to the correct hierarchy based on a predetermined set of rules and criteria.

This will provide an easier way to add customer accounts without having to perform the tedious task of assigning them manually to the appropriate account hierarchy.

Fast Software Rollout

Fullcast was able to implement the tools that OwnBackup needed, within a time frame that had previously been unreachable.

"We had a very compressed timeframe," said Malish. "I was concerned that we wouldn't be able to get it all done, but the Fullcast team put in a lot of effort and we were able to get it done in a much shorter time frame."

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**.