

CASE STUDY

# Territories in Hours, Not Days: Expel's Sales Planning Breakthrough



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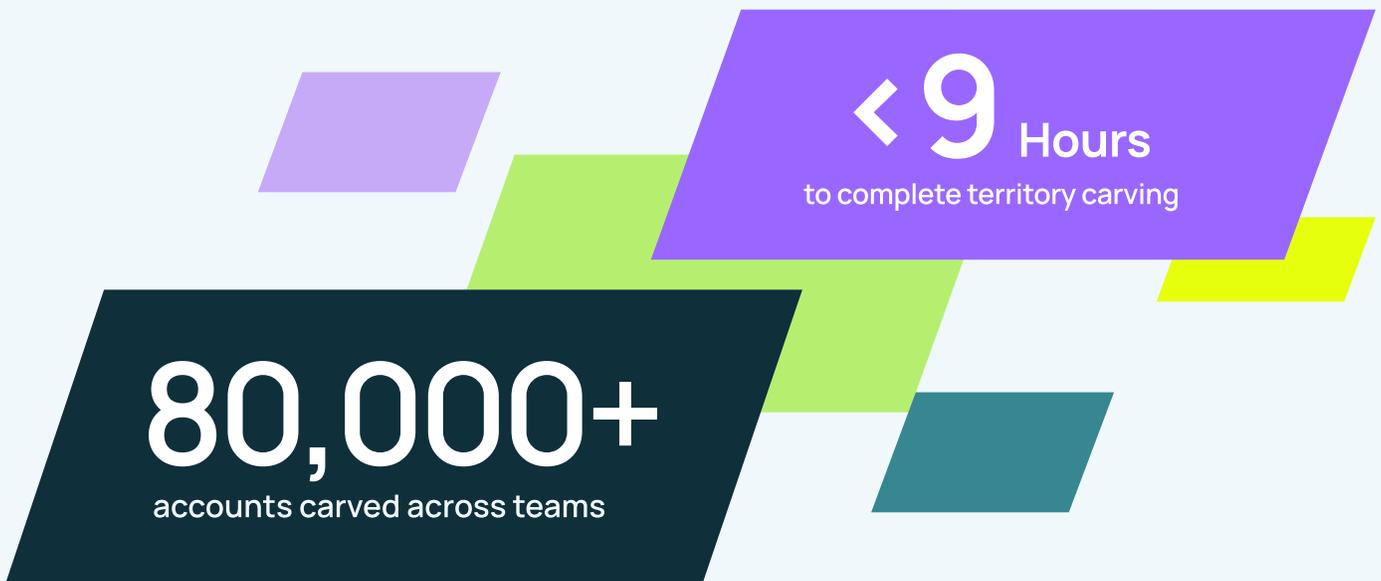


Vlad K.  
Principal GTM Strategy Manager, Expel



📁 Cybersecurity | 📍 Herndon, Virginia | 👤 500-1,000

Expel, a leading cybersecurity company, had long used CaptivateIQ Incentives to manage commissions, but their territory planning process remained stuck in spreadsheets. With 80,000+ accounts and complex routing logic, territory design was slow, manual, and error-prone. When CaptivateIQ launched its Planning product, Expel saw an opportunity to bring territory planning under the same roof as Incentives. The result? A faster, more collaborative, and data-driven planning process that scaled without breaking.



## The Hero

### Meet Expel's GTM Strategy & Ops Leader



**Vlad Khazanovich, Principal GTM Strategy Manager**

Leads territory design and owns annual planning for AE coverage. Strategic ops professional with both spreadsheet prowess and an eagerness to replace them.

# The Challenge

## A Fragile, Manual Territory Planning Process

Experiencing massive growth as a cybersecurity provider, Expel was seeing increased pressure on its go-to-market operations. Managing territory carving through Google Sheets had become increasingly unwieldy. Its GTM Strategy & Ops team managed complex routing logic, spanning parent-child account hierarchies, private equity ownership nuances, and zip-code-level coverage across 80,000+ accounts.

“We had well over 55 columns in a single Google Sheet. At that scale, everything becomes fragile—formulas break, logic becomes hard to track, and performance slows to a crawl.”



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Expel needed a scalable, collaborative solution to manage territory design without sacrificing the custom logic they'd built into their models.

# The Turning Point

## From Incentives Success to Planning Expansion

Expel has been a CaptivateIQ Incentives customer since 2021, relying on the platform to automate and manage complex commissions across their GTM team. But despite that success, territory planning remained manual—dependent on fragile spreadsheets and high-effort collaboration.

When CaptivateIQ introduced its Planning product in fall 2024, the Expel team was immediately intrigued. With a proven track record already in place from Incentives, it saw an opportunity to bring another critical GTM operations process under the same roof, and eliminate a major pain point in the process.

# The Solution

## Smarter, Collaborative Planning with CaptivateIQ

With CaptivateIQ Planning, Expel replicated its territory logic inside the flexible platform, moving from fragile spreadsheets to scalable models built for growth. The CaptivateIQ team partnered closely with Expel to rebuild routing formulas, integrate Salesforce data, and surface meaningful segmentation metrics for decision-making.

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The team leveraged dashboards for live workshops, giving GTM leaders visibility into the implications of territory changes in real time.

# The Results

## Faster Execution, Better Decisions, Greater Alignment

With CaptivateIQ Planning, Expel turned a slow, manual process into a fast, collaborative, and data-driven one, saving time, improving alignment, and increasing confidence in every decision.

### Faster Territory Planning

- **6 hours** to finalize enterprise territories; **2.5 hours** for commercial
- All decisions made live using CaptivateIQ dashboards

“Leadership from both the enterprise and commercial teams called it the fastest and most efficient territory carving session of their careers.”



Vlad K.  
Principal GTM Strategy Manager



## More Collaborative Process

- GTM leaders had access to dashboards ahead of time
- Planning sessions were working sessions, not readouts
- Scenarios could be modeled and visualized instantly

## Improved Decision Quality

- Centralized view of account ARR, segments, customer status, and rep assignments
- Enabled clear comparisons between planning options
- Removed ambiguity from decision-making

## What's Next

### Scaling Planning, Expanding Use Cases

Expel plans to expand its use of CaptivateIQ Planning to support intra-year territory changes, exception workflows, and scenario modeling for new hires. As it matures its sales planning process, the team is also exploring ways to incorporate capacity models and quota logic directly into Planning.

“This isn’t just a territory tool. It’s a planning solution that gives us the flexibility to scale our GTM engine with confidence.”



Vlad K.  
Principal GTM Strategy Manager



# Ready to modernize your sales planning process?

CaptivateIQ can help you set up plans quickly, save huge chunks of time, and better align your sales team with their objectives.

[Request a demo today](#)