



Client

Okta, Inc. is a publicly-traded identity management company based in San Francisco, CA. It provides cloud software that helps companies manage their employees' passwords by providing a "single sign-on" experience. Okta was founded in 2009 and has 1,600 employees.



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 business growth with a strategy that would bring clarity to forecasting for sales leaders, mitigate data errors, and empower sales reps to meet and exceed their quotas.

Solution

fullcast.io recognizes that each business is unique, so we dedicate a **business partner** to our customer to align on priorities. Okta was in the midst of building territories, so we first implemented our **Motion Module** to create and assign account hierarchies in their Salesforce instance. This software cleaned Okta's data and accurately assigned account families, resulting in more confidence in the go-to-market plan. To ensure high-quality data standards moving forward, fullcast.io established a data governance policy in the **Motion Module** 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.

Outcome

By creating account hierarchies, sales managers were able to improve their account planning, recognize longer runway for accounts, and understand how much space was left in the enterprise landscape. The sales operations team was 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 to win deals. "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. 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, Sales Operations Manager