



# Optimizing Account Assignment with Fullcast

How Fullcast Made Equitable Territory Segmentation Possible



INDUSTRY:  
B2B IT SALES

PLATFORM:  
SALESFORCE

USE CASES:

- Equitable territory segmentations
- Go-to-market optimization
- Ongoing success partnership



## BREAKDOWN

# Executive Summary

With a goal of equalizing account distribution among sales representatives and streamlining the account assignment process, Latch looked to Fullcast to increase efficiency and sales.



# LATCH

# 400%

Decrease in time spent cleansing & exporting data for visualization

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Fullcast is easy to use and has great visualizations. It was simple to understand the function and how we could leverage Fullcast's capabilities.

HELENA ARYAFAR,  
DIRECTOR OF SALES OPERATIONS, LATCH

## The Company

Latch is a full-building operating system designed to help owners, residents, and third parties like guests, couriers, and service providers seamlessly experience the modern building. By combining software, devices, and services into a single holistic platform, Latch makes multi-family living spaces more efficient, enjoyable, and profitable.



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“We worked under a really tight timeline. In just two weeks, Fullcast was able to create territory mapping—much quicker than competitors.”

NOELLE UGLESIC, VP OF GTM STRATEGY & REVENUE  
OPERATIONS OF LATCH

## The Challenge

Before using Fullcast, account lists and structures were spread out sporadically among the sales representatives. This system was inefficient, unbalanced, and lacked sense geographically.

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“There was a lot of inequality among reps. For example, one rep in Illinois had 90 accounts spanning across the nation, and other reps that had very few accounts, but clustered,” explains Helena Aryafar, Director of Sales Operations, who primarily manages the Fullcast account.

In addition, systematic tracking was not easily visible in the system used by the Latch team before onboarding Fullcast.

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It made the impossible possible.

HELENA ARYAFAR,  
DIRECTOR OF SALES OPERATIONS, LATCH

# The Strategy

Fullcast solved Latch's account management challenges by providing:

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## ● Equitable Territory Segmentation

To provide a more balanced and fair segmentation of territory among sales reps, Latch utilized the territory management software based on geographical location. Equal territory mapping led to an increase in both account functionality and sales team morale. Adding these specific metrics has helped to keep the balance of territories in check and allows for easy reporting.

## ● Go-to-Market Optimization

By putting equitable territory management in place at a rapid rate, Latch has maximized the effectiveness of its Salesforce usage. In addition, clear visualization of systematic tracking has been helpful for analytics. Because of this streamlined effect, Latch plans to lean on Fullcast when performing annual planning for the 2022 fiscal year.

## ● Ongoing Success Partnership

Working one-on-one with a customer success representative was imperative in utilizing Fullcast to its full potential. In-depth working sessions allowed the Latch team to better understand functions and territory mapping benefits for company growth.

"You have one partner, and you're doing it all in one system, helping to save time and money," says Noelle Ugelesic.



# 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](https://fullcast.io)**.