OPENPRISE™

okta

Okta boosts team productivity and efficiency with Openprise

Okta builds data management infrastructure using the Openprise platform

Okta, the leading provider of identity for the enterprise, is a vital component of the security infrastructure for more than 13,050 organizations. As a high-growth company, Okta has scaled quickly and found that manual processes that worked for the marketing and sales operations teams in earlier days could no longer scale to accommodate its growth. It was clear to Kat Nobles when she arrived at Okta as their new Marketing Operations Manager that Openprise could help. "I'd worked with Openprise at my previous company," explained Kat. "So, when I got to Okta, rather than trying to integrate several point solutions, I knew the Openprise platform would grow with us, from automating data quality to orchestrating even more complex processes."

Results

✔ Significantly increased speed-to-lead with automated list loading.

✔ Boosted team productivity by automating contact and lead-to-contact deduplication processes.

✔ Identified and merged 300,000 duplicates from a database of over six million records.

✔ Eliminated disruption by implementing sales territory realignment over a weekend instead of the usual two weeks.

✔ Cut manual lead-loading from 48 hours to five to ten minutes.

Cutting away expensive extras: deduplication

The first thing Kat's team tackled was removing duplicate records in their enormous database. Keeping duplicate records in Marketo cost Okta thousands of dollars in database storage fees and more importantly, slowed sales efforts and caused productivity to drop as multiple reps were contacting the same people. But deduplicating such an extensive database was no small feat, observed Jason Edgar, Okta's Senior Marketing Operations Analyst. Jason reported that the database contained several hundred thousand duplicates, but the complex business logic required to manage them made the dedupe process difficult.

"We can't just say 'let's dedupe!' and then merge all the records," Jason said. "Openprise was able to support that complex business logic without our team having to code anything." Using Openprise for contact, lead, and lead-to-contact deduplication, Okta was able to identify and merge 300,000 lead duplicates. Among the many benefits to automating dedupe, the Okta team found that giving sales better visibility into contact activity enabled them to create more tailored follow-ups. Okta also called out getting around database limits for their marketing automation platform as a highlight.

Putting an end to manual processes with list loading automation

It's always tricky to add new records from many different sources to a database. Field values don't always match the values you specified, so keeping the database clean can be a never-ending task. Okta's marketing operations team had been uploading new records into a Box file until someone manually cleaned them. "There are plenty of opportunities for human error," Jason said. "On top of that, those new leads get stale while they're waiting to be cleaned up and loaded."

Okta used Openprise to automate the cumbersome task of cleansing, normalizing, and uploading new lead files. Now, the system automatically ensures that the records are clean and require only minimal manual effort.

The time savings from automation are dramatic. Kat reported that what used to be a 24- to 48-hour turnaround has been reduced to five to ten minutes, so sales reps can access leads more quickly, which improves their connect rate and the number of new opportunities from a campaign.

Systems cutover: redrawing the sales territory lines

Okta has also used Openprise to automate processes related to the company's annual sales territory reorganizations. At the beginning of the company's fiscal year in February, Okta assigns salespeople new accounts, leads, and contacts to pursue. Behind the scenes, Kat's team works to make the reorg as seamless as possible. Before Openprise, the process of moving six million records to the right owners took weeks. "Now, we can run multiple scenarios and complete the process of reassigning territories over a weekend," said Kat. "Having all of that alignment complete and ready to go on the first day of the fiscal year means that there's no drop in productivity for the sales reps. They're ready to go on day one."

Next up: addressing compliance by streamlining field logic

Automating just these three processes with Openprise— deduplication, list loading, and territory reassignments—has netted significant time savings and increase in team productivity.

Now that the Okta team has an automation infrastructure in place, they're using the Openprise platform to automate several more complex projects that involve incorporating data across multiple objects down to the person level.

The company's recent project to simplify and manage their privacy compliance framework is a perfect example of this. "We're filtering data from 30 fields into a simplified set of five fields, so now it's easy for marketing and sales teams to see who they can email or call," Jason said. "Openprise is powering all of the logic that lets people know what they can or cannot do with records."

The company's web traffic tracking initiative is another example. The team is currently working on a project to track UTM data for a clearer picture of channel attribution and website traffic source insights. Documenting this complex process spans multiple systems and objects to properly pass the data from the campaign membership. "It would have been virtually impossible to accomplish UTM tracking with our previous tools," reported Jason. "But the execution plan is much more manageable in Openprise."

The Okta team is continuing to plan more projects with Openprise. "Openprise is so robust that it will not only help you solve the problems that led you to implement it, it will help you solve problems you don't even know you're facing yet," shared Jason.

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