



Funnel Metrics leverages Druva to enable more customers to optimize sales performance

97%

Reduction in the time to copy relationship data between Salesforce production and sandbox environments

About Funnel Metrics

Funnel Metrics, a Salesforce independent software partner (ISV), believes that all aspects of the sales function should execute against measurable analytics, follow step-by-step processes, and use established best practices. Funnel Metrics' unique scoring framework enables a more accurate assessment of team performance versus the common default of quota-based ranking.

The challenge

Funnel Metrics' FunnelocitySM application is built on the Salesforce Sales Cloud. Funnelocity helps sales organizations in companies across industries do a better job of managing their sales teams. The methodology employed in the app enables sales managers to better coach and analyze data in Salesforce to understand how reps are performing and give them direction on how to improve their performance.

To install the app, Funnel Metrics copies data and seeds it to a sandbox so that its AI models can evaluate the data, predict the future performance of salespeople based on their current revenue performance, and assign a zero to 10 rating on how each salesperson is likely to perform in the next year.

Funnel Metrics was populating data into sandboxes via the Salesforce Data Loader tool, which is a manual, tedious process involving spreadsheets. According to Chief Technology Officer



Challenges

- Populating data into sandboxes via the Salesforce Data Loader tool, which was a manual, tedious process involving spreadsheets
- Copying data using the Salesforce Data Loader tool broke the connections between production and the sandbox

Solution

- Funnel Metrics copies 200 MB of data into a dev sandbox using Druva's Sandbox Seeding Solution, while maintaining data relationships
- Faster testing with greater confidence via self-service data delivery, which reduces the time and costs to prepare sandboxes
- Eliminated the need for managing spreadsheets and data loaders

Results

- 97% reduction in the time to copy relationship data between Salesforce production and sandbox environments
- Up to 6x increase in the number of customers Funnel Metrics can install per month with Druva
- Acceleration of Salesforce projects and increased efficiency with predictable sandbox seeding

(CTO) Terry Walsh, “One of the biggest drawbacks of the manual Data Loader process is that when you copy data from a production environment to a sandbox, you effectively lose all the connections between the two.”

“Every record in Salesforce has an 18 digit ID, but all of those IDs disappear and are replaced by new IDs in the sandbox. Without having those record relationships established, we had to manually figure it out, which was a brutal process,” Walsh added.

The solution

“We’re working with sales leaders and Salesforce users who manage their sales organizations on our data. So, we had to find a tool that would permit us to be very efficient,” he said. “There are other tools that do data copying in different ways, like MuleSoft and Jitterbit, but they are just glorified copying tools, not really seeding tools,” said Walsh.

Funnel Metrics copies as much data into a dev sandbox as it’s permitted to do, which is 200 megabytes (MB) of data. “We have to make sure what we have is as complete as possible, and Druva’s Sandbox Seeding Solution allows us to manage that process, whether it’s just copying the data over or resolving errors and conflicts between the data, finding relationships in the data that we didn’t understand or know about.”

He added, “Druva’s solution has been a lifesaver for us, and we can confidently say it is one of our true success factors.”

Druva helps organizations accelerate Salesforce projects and drive efficiency with predictable sandbox seeding. This enables faster testing with greater confidence via self-service data delivery, reducing time and costs to prepare sandboxes. This means there is no need for managing spreadsheets or manual data loading.

Druva provides real-time, on-demand test data that reduces project costs, requires less resources, and shortens project schedules. What used to be a manual process that could take hours or days can now be automated and completed in minutes.

The results

Leveraging the Druva solution, Walsh and team can accomplish in two hours what used to take up to two weeks – a 97 percent decrease in time. “In the period of time when

we were copying data manually, it took two weeks to do that. With Druva, we can do that in two hours. Especially with large complex Salesforce implementations, Druva saves us a ton of time and helps us to build out the data we need in order to accurately configure and install our product using our customers’ data,” said Walsh.

With Druva, Funnel Metrics can increase the query or selection inside the tool, and it automatically grabs the relationships a lot faster. “Our customers achieve a higher return on investment (ROI) as they start grabbing more data. With Druva, we copy more data faster and get more value out of our technology,” said Walsh.

He added, “We’re bringing efficiency to our customers’ developer teams to give them the accurate data set they need inside their sandboxes for better testing.”

According to Walsh, the economic benefit and the metric is the number of customers they can install. “Druva enables us to increase the number of potential customers we can install from one up to half a dozen per month.”

Leveraging Druva, Funnel Metrics’ developers are far more efficient, as they have eliminated manual tasks and the need for spreadsheets and data loaders. Druva helps Funnel Metrics’ Funnelcity identify the data relationships that exist. “Druva gives us the ability to understand what data contributes to revenue and reps’ activities, which improves our customer relationships,” said Walsh.



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