

CUSTOMER STORIES

Why **dbt Labs** and **Carta** Chose to Go Pigment



Industry
Equity & capitalization table
management software

Employee size
2,000

Headquarters
San Francisco, US

Use cases

- Revenue planning
- Headcount planning

Implementation time
12 weeks

Integrations

 Netsuite  Workday

01 WHY CHOOSE PIGMENT?

Unmatch flexibility for fast-paced changes

In the past, Carta explored several business planning solutions, but never found the level of flexibility required for the company's pace of business. With Pigment, the team said goodbye to painful re-implementation while revising business unit structures and org charts. Pigment was the modern business planning software that resisted breaking under ever-changing conditions.

A powerful data model for superior data wrangling

Sarah and her team at dbt Labs are well versed in the world of business planning software. In short, they've seen it all. But they hadn't yet come across a planning platform that supported a more flexible, flatter data structure that breaks the traditional mold of rigid hierarchies. Pigment's unique data model, including the power of flexible dimension properties that drive natural aggregations and filtering, really spoke to their needs. With Pigment, they exchanged rigid data cubes and troublesome sparsity challenges for powerful data structures and ease of data processing.

02 TALES OF IMPLEMENTATION

Plan each day to beat the race

At Carta, Kevin and team dedicated focus time each day to really zoom in on Pigment implementation needs. This translated to two-hour calls nearly every morning with the Pigment team, so they were never alone in their mission to succeed.

The key to successfully implementing a business planning solution? Get early buy-in from cross-functional team members and split implementation into workable chunks and use cases.

As a result, the team now boasts rolling out Pigment to the entire executive team at Carta with stellar results.

What's even better, the team at Carta had Pigment running and catering to its 2,000 employees, in no time.



It's been awesome to start seeing adoption. Our CFO was answering questions for himself constantly on [Pigment], which has been amazing for me.



Kevin Zell · Carta
Senior Manager of Strategic Finance

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Sarah Riley
Sr. Director,
Head of Finance & Strategy



Kevin Zell
Senior Manager
of Strategic Finance



02 TALES OF IMPLEMENTATION

Prioritization is the key to faster implementation

Sarah and the dbt Labs team committed firmly in Q1 to set up and run Pigment by the start of Q2. Such quick motion could only be achieved through laser-share clarity on key priorities.

The Strategic Finance team started by implementing workforce and expense planning, getting to a good running state by four weeks. Their end goal was a decentralized planning process that could easily be accessed and used by executives and department heads alike.

The team successfully walked through their forecasts on Pigment to C Suite executives at a board meeting, with outstanding leadership adoption of the tool. They also extensively trained the team on Pigment. The end result was increased visibility and control on the pulse of the business for more confident decision making.



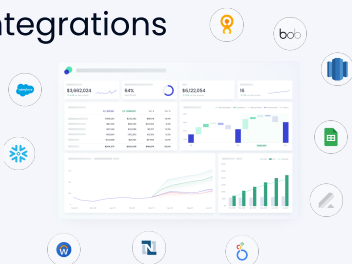
We took a pretty extensive approach rolling it out to the executive team. We actually have our CEO plus two layers in the tool.



Sarah Riley · dbt Labs
Sr. Director, Head of Finance & Strategy

INTEGRATIONS

More power with Pigment integrations



The teams at dbt Labs and Carta have both resolved to scrap manual data integrations for Pigment's extensive selection of native data connectors. They aim to increase usage of integrations including Workday.

Pigment replaces the outdated and time-consuming standard of manual data imports and csv files with native integrations including ERP, CRM, HRIS, ATS, billing and payment systems, and other data sources.

03 PIGMENT USE CASES

How Carta uses Pigment

Carta has primarily implemented Revenue Planning and Headcount Planning use cases on Pigment. More specifically, the Revenue team performs their ARR forecasts and plan headcount with imported employee roster data from Workday. The Pigment interface is so engaging and powerful that Kevin uses the tool throughout the day for ongoing analyses. Yet it still results in less time wasted on data prep when compared to spreadsheet-centric solutions. Overall, executives contribute time to reviewing dashboards while analysts build out forecasts and boards in Pigment.

Pigment enables more efficient headcount planning

Headcount planning was a nightmare of spreadsheets and poor visibility before Pigment. With Pigment, Carta now has a much better way to manage headcount, one of the primary cost sources for most SaaS business. Hiring managers have a centralized location to see open requisitions, and the company saves costs on redundant or unnecessary open job requisitions. It is much easier to understand the impact of org chart restructures on the financials of the company. All in all, Pigment boosts clarity in the headcount planning process.

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04 PROUDEST ACHIEVEMENT ON PIGMENT

No longer gatekeepers of data

Everyone at the organization, from the CEO to hiring managers, benefit from easy access to data insights. With Pigment, Carta's FP&A team were no longer the gatekeepers of data. With 30,000 customers to serve, datasets at Carta are enormous and difficult to distribute in the form of actionable insights.

With Pigment, everyone including executives and analysts could segment data in precisely the way they wanted for their specific business needs. All of this would be close to impossible with spreadsheets.

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"We didn't have the systems or tools for [the executive team] to have visibility into executive level budgets on a regular basis. And it's hard to hold anyone accountable unless you give them the tools to understand their business. And now, I actually feel like they have it."



Sarah Riley · dbt Labs
Sr. Director, Head of Finance & Strategy

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"We've been the gatekeepers of so much data, and it makes our jobs way less fun because people are constantly asking us questions that they could answer themselves if they just had access to it."



Kevin Zell · Carta
Senior Manager of Strategic Finance

Superior visibility to leadership

The dbt Labs executive team's wishlist included improved visibility into executive budgets, something that Pigment was able to provide. They realized that greater accountability happens with the right tools to understand the business.

What's more, the company is now able to implement proactive decision making by catching early warning signs that can then be quickly rectified.



An achievable vision for the future with Pigment

Even a distant vision for the future becomes easier to reach with Pigment. Sarah shared how dbt Labs started with the Finance function, but quickly evolved into covering more of the sales funnel and setting role-specific targets across all elements of the Go-to-market.

For Carta, it was the ability to analyze more data than ever before, at the right time. The team moved from reactive reporting to frequent, real-time analyses. This enabled them to capture the needs of the business in a more robust and actionable way.

Both dbt Labs and Carta could now ask questions they never asked before, all within the Pigment business planning platform.