

Engage The Right Customer Advocates, Fuel Customer Success

The Upland RO-Gainsight integration links customer success and customer advocacy efforts in key ways to drive value:



Sync important customer success indicators, like health scores, with customer reference records



Affect customer success health scores based on advocacy participation (or lack thereof), customer marketing asset usage, and sales enablement success



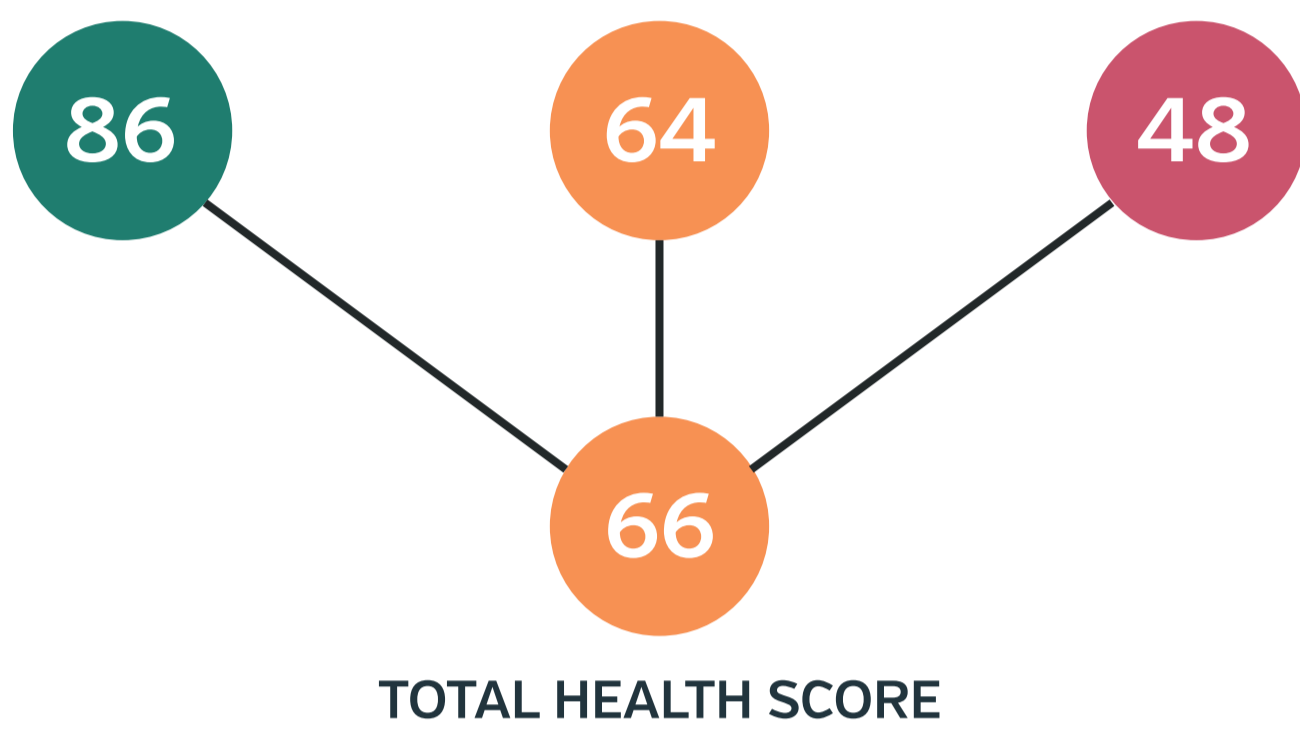
Systematically control which customers are offered as references based on health status

How does it work?

Ensure Only Happy Customers Are Referenceable



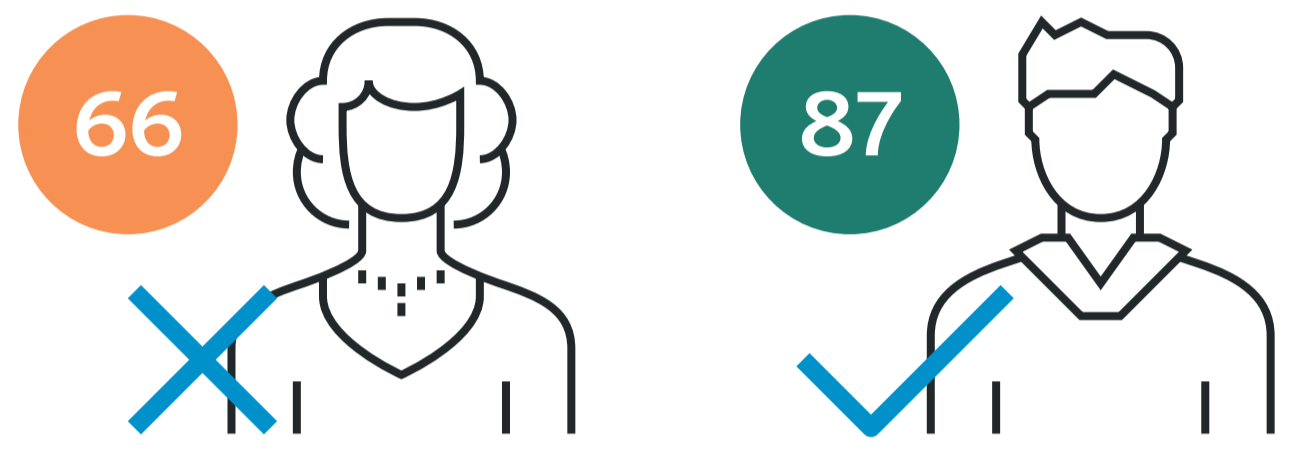
Gainsight assigns customer health score to a variety of indicators across the customer lifecycle to create a Total Health Index.



Each area has a score and a color (Red, Yellow, Green), and all areas feed the Total Health Index (also Red, Yellow, Green).



Upland RO Innovation reads the Total Health Index score for a customer from Gainsight and programmatically determines if the customer should or should not be offered as a reference.



For example: When the Total Health Index is red (and/or yellow, based on company preference), the RO system will not offer the customer up as a reference.

Affect Customer Health Scores Via Upland RO Innovation In 3 Ways

Advocacy & Engagement Health Scores

[Use Case #1] When a customer participates in a reference activity (like a reference call), points are attributed to the Advocacy health score in Gainsight.

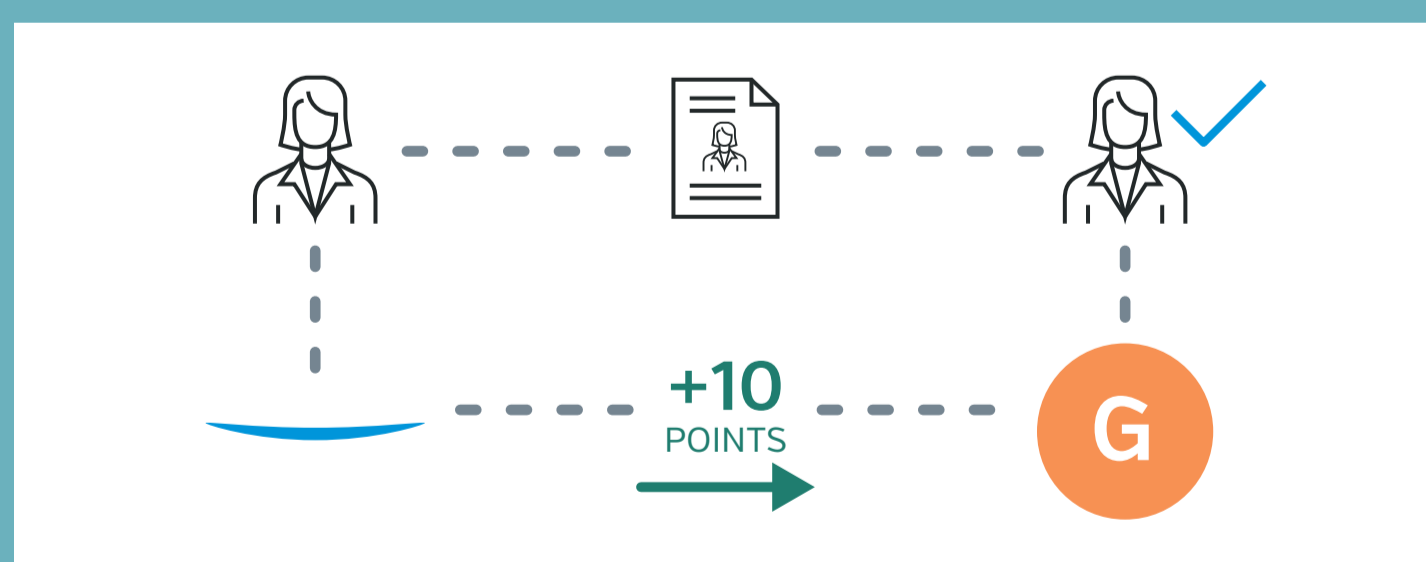


[Use Case #2] No one has participated in reference activities on a customer account for a specified time frame (for example, 90 days). RO Innovation decrements points in Gainsight, which potentially changes health status color (for example, from green to yellow).



Marketing, Lead Generation & Awareness Health Scores

Whenever a customer marketing asset (like a case study) is engaged by a prospect/current customer via the tracking in RO's platform, a specified number of points are directed to Gainsight which increase the customer's marketing-related health score in Gainsight.



Sales Enablement Health Scores

A variety of customer marketing assets (i.e. case study, video interview) and customer reference activities (i.e. site visit, call) were used during the buyer's journey and influenced that deal to close. RO Innovation tracks that and directs points to Gainsight and boosts the sales enablement-related health score.



Why is this important to have NOW?



MARKET TRENDS

- + Increased competition has made customer experience a true differentiator
- + Buyers journey is changing
- + More content "noise" diluting value messages & buyer trust
- + Peer-to-Peer strategies increasing



B2B COMPANY TRENDS

- + Increased focus on customer success and customer advocacy
- + Drive revenue from positive customer advocacy & shared experiences
- + Reduce attrition via customer health across customer lifecycle
- + Revenue attribution to program impact

Interested in learning more? Contact Upland RO Innovation for a demo.