Right Content & Customer Advocates, Right Opportunity, Right Time

Introduce a new level of efficiency and effectiveness to your sales, marketing and customer reference teams. With the RO Innovation + Microsoft Dynamics integration you can:

- Increase usage and adoption of your CRM and RO Innovation investments
- Automatically pass key customer and contact information from Dynamics to various workflows within RO Innovation
- Report effectiveness, ROI and revenue influenced by marketing content and customer references
- Shorten sales cycles to drive new revenue faster

- Boost productivity of your sales team and get new reps up to speed faster
- Ensure salespeople have effective assets at their fingertips
- Streamline the customer reference request process

How Does it Work?

SINGLE SIGN-ON

This integration enables seamless user access to the RO Innovation platform from a user's Dynamics account and enables access to the following RO features:

+ Find Assets & Send Spotlights
+ Find & Request a Reference
+ Nominate a Reference
+ Review status of reference requests and nominations

FIND ASSETS & SEND SPOTLIGHTS

+ Relevant assets and Spotlights are suggested based on information on the Opportunity record (account, sales stage, deal size, etc.)
    - Spotlights are then sent from RO to contacts associated on the Dynamics Opportunity
+ Users can also initiate their own search for assets from the Opportunity record
+ Asset utilization and contact visits to Spotlights associated with Opportunity record are tracked in the RO platform

FIND & REQUEST A REFERENCE

+ Click Request Reference from Opportunity record
+ Information from Opportunity record is automatically populated into the RO form and creates a workflow for approval in the RO Innovation platform
+ User receives notification from RO system when their request has been fulfilled or denied.

NOMINATE A REFERENCE

+ Click Nominate Reference on Dynamics Contact record
+ Information from Contact record is populated and sent to the RO platform, along with the nominator's contact info
+ Reference Manager reviews in the RO platform
+ When approved, a new customer record is automatically created in the RO platform

ADD A NEW CUSTOMER REFERENCE RECORD

+ On "Add a Reference" screen in RO Innovation, the list of contacts is populated from the Account/Contacts records in Dynamics into a dropdown list.
+ When a contact is selected, the contact information (First & Last Name, Email, Title, Phone, Alternate Phone, Fax) is populated from Dynamics into the Upland RO Innovation record.

What else does this integration achieve?

DRIVE REVENUE

+ Cater to the daily workflows of sales reps in your CRM
+ Increase sales productivity: send the right materials to potential customers at the right time
+ Real-time tracking intelligence helps close more deals, faster

STREAMLINE WORKFLOWS

+ Intuitive integration points streamline reference workflows (like nomination and request submissions)
+ Increases productivity of sales and marketing teams
+ Leverage Dynamics as the system of record for customer data to only manage data in one business system, rather than multiple.

LEVERAGE YOUR BEST SALES ASSETS

+ Proactively push the most relevant sales content and customer references to the rep based on their Opportunity
+ Tie references to closed deals for ROI reports at your fingertips

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