

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:



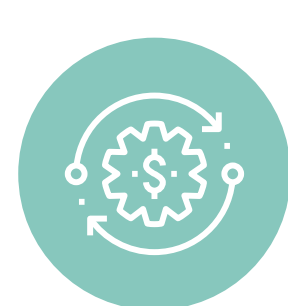
Increase usage and adoption of your CRM and RO Innovation investments



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

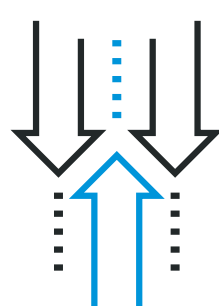
- + On "Add a Reference" screen in RO Innovation, the list of contacts is populated from the Account/Contacts records in Dynamics into a dropdown list.
- + When a contact is selected, the contact information (First & Last Name, Email, Title, Phone, Alternate Phone, Fax) is populated from Dynamics into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

What else does this integration achieve?



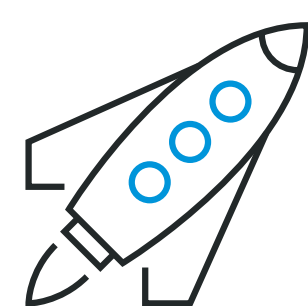
DRIVE REVENUE

- + 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.