upland RO Innovation +

Right Content & Customer Advocates, Right Opportunity, Right Time

Individually, Salesforce.com[®] and RO Innovation are impressive platforms. Together, they introduce a whole new level of efficiency and effectiveness to sales, marketing and customer reference teams.



Shorten sales cycles to drive new revenue faster



Boost productivity of your sales team and get new reps up to speed faster



salesforce

Increase usage and adoption of your CRM and RO Innovation investments



Ensure salespeople have effective assets at their fingertips





Streamline the customer reference request process



Report effectiveness, ROI and revenue influenced by marketing content and customer references



Maintain cleaner customer data and records from one seamless system

How Does it Work?



Send the right asset at the right time with pre-filtered, recommended customer references & marketing assets within the Opportunity record in Salesforce.com. Track engagement for more intelligent follow up that moves the deal along faster.

Show Feed			
1 Opportunity Detail		ompetitors [0] Stage Hist	Activity History [0] Notes & Attachments [0] Corry [1]
Opportunity Owner	Lim Forrester (Change)	Ready Assets	References (10) Collateral (19) Internal (4)
Private		2 Quick Plays	Know (2) Say (3)
Opportunity Name	Seattle Seafood Company	Amount	\$325,000.00
Account Name	Seattle Seafood Company	Expected Revenue	\$325,000.00
Туре	New Customer	Close Date	3/14/2017
Lead Source	Web	Next Step	Classed West
Product Group Primary Campaign Source	Data Conversion Services	Stage Probability (%)	Closed Won 100%
Order Number		Main Competitor(s)	10070
Current Generator(s)	De	elivery/Installation Status	
Tracking Number	-		
Created By	Jim Forrester, 3/14/2017 10:35 AM	Last Modified By	Jim Forrester, 3/14/2017 10:35 AM
Description	Antesia promisi ya antesia 2010	n daa bar waan na ada daa aha aha daa daa daa daa daa da	

- Based on information in the Opportunity, quickly find customer references and assets that are the most relevant match. Users can also deploy recommended, ready-made Spotlights (microsites) and assets based on stage in the sales cycle.
- 2. Quick Plays coach reps on next steps and other tribal knowledge they can leverage that will help move their deal along faster.
- Share & increase tribal knowledge on what was successful during sales cycles.
 Prime the customer reference funnel with new customers to nourish the program.

CONTACT RECORD

	Name Account Name	Corey Fisher Coca-Cola			Home Phone Mobile			
	Title	VP Channel Partners			Other Phone			
	Department	Sales			Fax			
	Birthdate				Email			
	Reports To	[View Org Chart]			Assistant			
	Lead Source				Asst. Phone			
	Mailing Address	121 Baker Street NW Atlanta, GA 30313 – 180	7		Other Address			
	Languages				Level			
	Created By	Jim Forrester, 7/30/2012	9:57 AM		Last Modified By	Jim Forrester, 7	/30/2012 9:57 AM	
	Description	[Edit Delete Clone R	Request Update				
Referenc	e Nominations	1	Nominate as Reference				Reference Nominations Help	?
Action	Date		Status		Rejection Reason	É.		
Edit Del	12/14/2016		New					
Edit Del	1/5/2015		Approved					
Edit Del	4/11/2015		New					
Edit Del	1/8/2016		New					
Spotlight	Activities	2	Send a Spotlight				Spotlight Activities Help	?
Action	Spotlight Name		Created	d Date	Visited	Visit Date	Assets viewed	
Edit Del	Acme Customer Ref	erences	3/10/20	15				
con Del			5/10/20	//3				_

1. Sales users can nominate contacts to be customer references directly from the Contacts tab to support the company's

Contacts tab to support the company's reference program. This results in higher efficiency levels and better quality data in the reference database because it is flowing directly from the contact record to the nomination form.

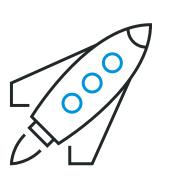
2. Sales users can send and track engagement with Spotlights (custom microsites). When the deal closes, Marketing is then able to report revenue influenced by content and customer references used to close the deal.

What else does this integration achieve?

DRIVE REVENUE

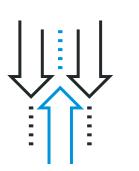
- + Cater to the daily workflows of sales reps in your CRM
- Increase sales productivity: send the right materials to potential customers at the right time
- Real-time tracking
 intelligence helps close
 more deals, faster

salesforce



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



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

Certified AppExchange Partner

Upland RO Innovation has maintained a tight, secure integration with

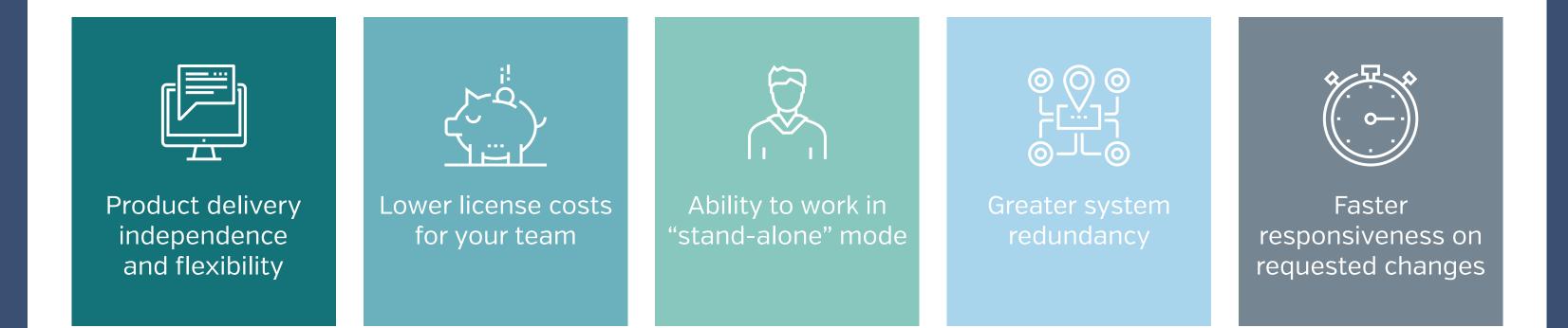
Salesforce.com since the launch of the AppExchange in 2006. This certification

means Salesforce.com confirms Upland RO Innovation meets industry best



practices for security and integration.

RO Innovation applications directly access Force.com objects to fully leverage all the benefits of being a "native" Salesforce.com application without the headaches for your team. By maintaining our own platform outside of Salesforce.com, your team benefits from:



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

appexchange

partner

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