upland RO Innovation + salesforce

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.

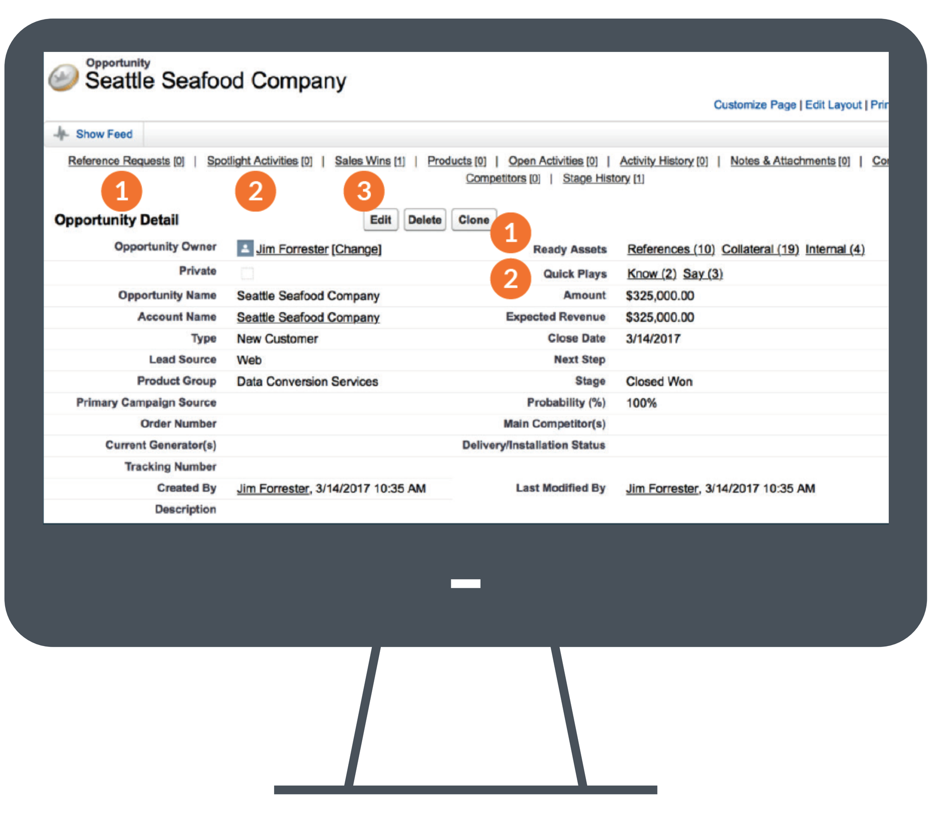
- Shorten sales cycles to drive new revenue faster
- Boost productivity of your sales team and get new reps up to speed faster
- Increase usage and adoption of your CRM and RO Innovation investments
- Ensure salespeople have effective assets at their fingertips

- 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?

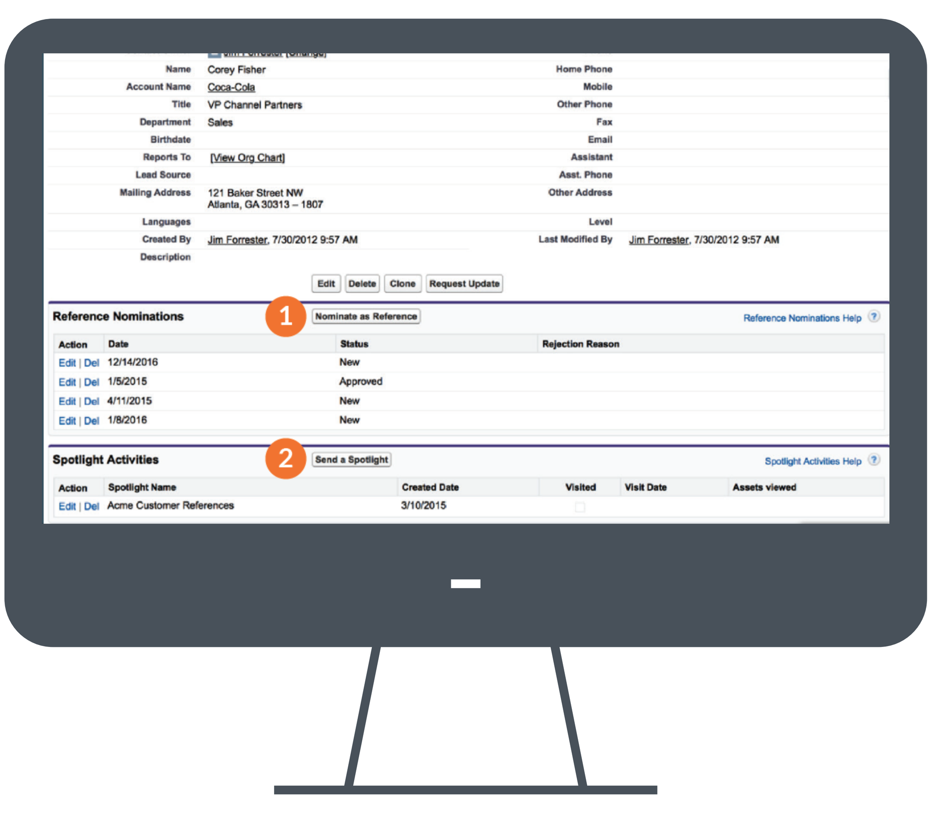
OPPORTUNITY RECORD

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.



1. 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.
3. 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



1. Sales users can nominate contacts to be customer references directly from the 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

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 system, rather than multiple.

Certified AppExchange Partner

salesforce 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.

ALL THE BENEFITS OF "NATIVE" WITHOUT THE HEADACHES

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:

- Product delivery independence and flexibility
- Lower license costs for your team
- Ability to work in "stand-alone" mode
- Greater system redundancy
- Faster responsiveness on requested changes

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