As the critical hub between your sales, marketing, and customer advocacy teams, Upland RO Innovation helps organizations simplify reference management and include trusted customer voices in every stage of the buyer's journey. With targeted customer references and marketing content, your revenue teams can break through the noise to influence buyers and increase win rates.

Reference Management

Revenue teams can access RO Innovation directly or through Salesforce and other leading CRMs. From RO Innovation, teams can request, manage, and share reference customer contacts and reference content, such as case studies and quotes. Tracking eliminates reference burnout by preventing teams from misusing and overusing references, while automated workflows expedite new reference requests and nominations.

Content Management

At RO Innovation's core is a central library of reference customer contacts and sales content. Teams can store content directly in RO Innovation or link to wherever the content is already stored. Rather than sending email attachments, teams can share collections of content through custom microsites. When prospects view content, RO Innovation alerts sales, so they can follow-up at the optimal time.

Reference Management

Content Management

Sales Enablement

Sales Enablement

Available as an add-on, the Sales Enablement module helps sales know what to do, say, and share at every stage of the buyer's journey. Based on the opportunity and sales stage, RO Innovation will automatically suggest the best content, reference customers, and guidance, directly within CRM opportunities. Additionally, sales win/loss tracking captures insights to drive success and identify potential future reference customers.

Key RO Innovation Features

+ **Central Library**
Establish a single source of truth for approved customer reference contacts and marketing content.
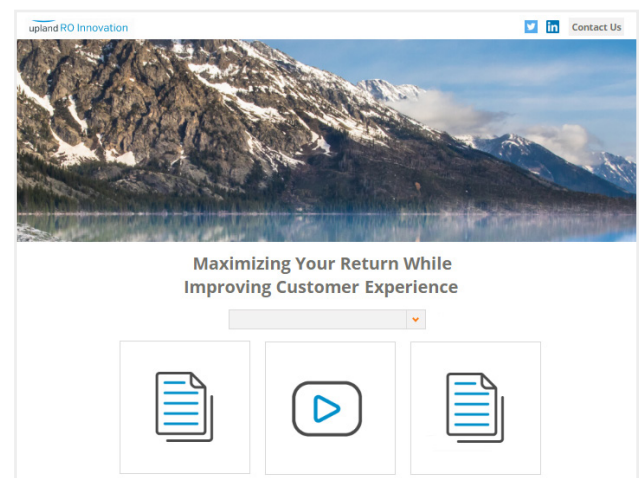
+ **Automatic Workflows**
Simplify and expedite reference requests as well as nominations for new voice of the customer program participants.

+ **Reference Tracking**
Prevent reference misuse and overuse with built-in tracking and controls to honor participants' wishes.

+ **Custom Microsites**
Share content in context via customizable microsites that track views and alert sales when it is time to follow-up.

RO Innovation Resources

All RO Innovation customers receive access to the product Help Center and Customer Community for self-guided learning. Customers can also engage our expert professional services team for paid consulting and explore topics in-depth via online courses from RO Innovation University.

Find out more about RO Innovation, or request a demo, at: uplandsoftware.com/roinnovation.

About Upland Software

Upland Software (Nasdaq: UPLD) is a leader in cloud-based enterprise work management software. Upland provides four enterprise cloud solution suites that enable more than one million users at over 9,000 accounts to win and engage customers, automate business operations, manage projects and IT costs, and share knowledge throughout the enterprise. All of Upland's solutions are backed by a 100 percent customer success commitment and the UplandOne platform, which puts customers at the center of everything we do.