ELEVATE
customer summit

SAN JOSE, CALIFORNIA NOVEMBER 14 - 15

RISE HIGHER

by Upland RO Innovation

Secrets of Top Performers
Learn from the best customer marketing superstars

Success with the RO Innovation Platform
Advice from the experts in the field

Product Spotlight
Discover RO features and fan favorites

Global Recognition
Celebrating the industry leaders

2018

upland
RO Innovation

2018

Applauding Those Who Rose Higher

From humble beginnings to building a successful company, the team at RO Innovation knows that recognition is one of the most important components to building a successful company and engaging customers in meaningful ways. Accolades for those who work hard, push themselves to achieve even more, and contribute meaningful value to others and their companies are deeply held RO Innovation values. This magazine is a small way of paying tribute to those who deserve a piece of the spotlight.

Motivating and inspiring others, creating an ever-expanding set of best practices, and consistently innovating what's possible in this industry is what makes RO Innovation's customers the best community in the world. You are the heart of the customer marketing movement and peer-to-peer selling revolution. And now that RO Innovation is part of the Upland Software family, we have more resources to help you pave the way. How exciting!

So please...open this beautiful magazine and read about all those who achieved big things this year... as well as gain advice, tips, and product information. We're sure you'll find this resource incredibly handy. Cheers, to another fantastic Elevate experience!

ELEVATE customer summit

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Rising to New Heights | Elevate 2018

This is it. The big one.

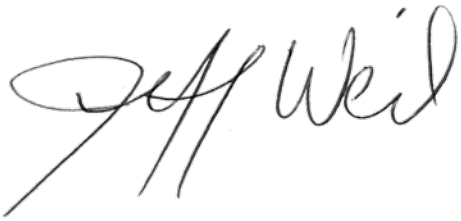
If you work in any customer marketing or customer-facing role, you've probably heard the buzz, and know that the RO Elevate Customer Summit is the place to be. Welcome to San Jose! I feel so fortunate to be a part of the action and can't wait to see what the next few days have in store.

In this issue, we have a good bit of content, some of which will be played out live during the next few days of our event. We'll share updates on the RO Innovation platform, highlight product features, shine a light on key updates, regale you with customer success stories and new best practice ideas, and finally, we'll recognize some of the industry's top leaders with in-depth profiles. We have a lot to cover.

RO Innovation has had some watershed moments this year, perhaps most notably in joining the Upland Software family. With any change can come a twinge of uncertainty, but for me, change brings exciting new opportunities to the forefront; solutions that had never even been considered, opportunities for ideas to join forces and conquer new challenges, and the whiff of innovation just around the corner. There's electricity in the air!

I believe we are at our very best (and are happiest) when we are fully engaged in good work on the journey toward achieving our goals. I look forward to working with each of you as we rise to meet new challenges, celebrate new opportunities, and surmount the loftiest of goals in 2019 - and beyond.

Cheers,



Jeff Weil
General Manager

upland RO Innovation

Committed to Your Success

You want to take your program to the next level and do it like a professional superstar. You want to be recognized as the leader of an award-winning program. Most importantly, you want to show other people that it's possible to be successful in this career field and showcase the power and impact customer advocacy has on your business.

Our Promise to You

To enable 100% customer success, Upland RO Innovation offers a package of programs, services, and commitments we call the Upland Customer Success Program. When you take advantage of the opportunities this program offers, you'll see your program's success skyrocket to new levels.

"At Nuance, our customer-first priority is at the heart of everything we do. With that in mind, we've built our reference program to provide a world-class experience for our customers and Sales partners. RO Innovation has helped us grow our program and track our customer interactions, information, and activities, ensuring we are able to respond to reference requests in a timely fashion and avoid over-taxing our most valuable assets: our reference customers."

Brenda Hodge
CMO
NUANCE

"The closer alignment and collaboration across Symantec's various teams has increased reference requests 57%. Supporting such a wide array of product offerings would be nearly impossible without the range of features RO Innovation delivers."

Richard Clooke
Senior Marketing Manager
Symantec

BASICS:

What Does the Program Offer?

Onboarding & Training

We recognize that customer success is not a one-time event. From the time a purchase decision is made, all the way to steady-state system use and periodic upgrades, Upland is there to guide you through the journey to success with our Professional Services, Training and Support teams.

Customer Success Manager

Upland Customer Success Representatives ensure you have a trusted advisor who becomes your champion at Upland. From driving strategic elements of your implementation, to understanding your business goals and creating measurable, meaningful steps to ensure you achieve your objectives and adapt to changing circumstances, your CSM helps drive continuous improvement to ensure you achieve the success you expect.

Premier Success Plans

To help you drive towards your unique success goals, we offer a range of Premier Success Plans that eliminate the need for costly custom services and support and build the foundation for success.

Virtual User Conferences (VUCs)

These quarterly webcasts are customized by product line and provide updated product roadmaps, services and support updates, a product training feature, and the opportunity for you to provide feedback.

Executive Outreach

All customers have direct access to Upland RO Innovation executives through regular VUCs, where you can ask questions and get a deeper understanding of the strategic direction of our product line. Premier Success Plans customers have an additional level of access to our executive team through semi-annual executive update meetings.

Product Feedback Loop

Customer feedback is at the heart of the Upland customer experience. Direct customer input hones our product roadmaps to ensure you get the most out of your Upland RO Innovation application today and in the future. Customers with Premier Success Plans are given additional priority weighting for new features and minor issue resolution. Additional product feedback avenues include: Customer Success Managers and Representatives, VUCs, Customer Advisory Boards, and Upland's Online Communities.

2018 RO Sherpa Awards Winners

Leading Customer Reference Programs to New Heights

The RO Sherpa Awards recognize the leaders in the customer marketing space; the guides, the heroes that do incredible things in their companies but do not always get the recognition they deserve. These awards are a way to elevate the thought leadership, advocacy, great ideas and remarkable customer reference program best practices in the marketplace.

Best In Class Customer Advocacy Program	Marketo™ An Adobe Company
Outstanding Executive Leadership	Rimini Street Engineered for Support
Exceptional Customer Advocacy Alignment	Marketo™ An Adobe Company
Most Valued Program	IBM
Most Improved Program	Informatica
Best Advocate Engagement	IBM
Rising Star	Symantec
Innovative Feature Use	FORTINET
Top Game Changer	ForeScout

"Winning the 'Best In Class Customer Advocacy Program' Sherpa Award is an exciting achievement! It means so much to be recognized for our team's hard work and vision to create a comprehensive Customer Advocacy Program. To be honored as a top program and proven value creator at Marketo is confirmation we're doing things right and is a motivator to continue evolving our program to take it to even greater heights."

Kevin Lau
Senior Manager, Customer Marketing
Marketo™ An Adobe Company

2018 RO Sherpa Awards
Honorable Mentions

The competition for this year's RO Sherpa Awards was intense! This year, RO Innovation added two new award categories, and received more than two times more applications than in 2017. With so many great stories, we decided to add an additional distinction for Honorable Mentions. There were so many stories customers shared that were just too amazing not to recognize.

Best In Class Customer Advocacy Program	Microsoft
Outstanding Executive Leadership	NUANCE
Exceptional Customer Advocacy Alignment	ZEBRA
Most Valued Program	Cognizant
Most Improved Program	servicemax From GE Digital
Rising Star	talkdesk
Best Customer Program Tech Stack	outsystems
Innovative Feature Use	IBM
Top Game Changer	jda.

"We are pleased that Will has been recognized with Upland RO Innovation's Outstanding Executive Leadership award. Will demonstrates the ability to actively support client reference programs, promotes positive client advocacy initiatives and always encourages advancement among his team. He exemplifies Rimini Street's passion for, and focus on, delivering excellent service to clients – as the VP of Client Success, he works every day to put the client first."

David Rowe
Chief Marketing Officer and Senior Vice President
Rimini Street
Engineered for Support

Congratulations to all!

Meet these Reference Management

Rock Stars!

These four leaders are helping shape the direction of this industry. We clap our hands in recognition of the superlative jobs they do and honor them by giving them this space to tell a bit of their story.

Let's get an inside look to see what they do to succeed. We can learn a lot from these reference management stars.

Read on!

Dawn Miears

Global Customer Reference Manager

Rimini Street

Engineered for Support

Creating Winning Advocacy Programs for More Than a Decade

Dawn Miears, Global Customer Reference Manager for Rimini Street Inc., a global leader in third-party software support services, has that unique blend of complex project management skills, customer relationship, management and a background that clearly explains the accolades and recognition that both she and Rimini Street's reference program received, not only from their sales and marketing team members, but from their customer advocates.

Passion and Enthusiasm for the Voice of the Customer

Dawn's reference management career began close to fourteen years ago with her role as the Senior Director of Operations and Customer Reference Manager for Visual Media Design Network (VMDnet) a preferred vendor for HP. Dawn found that interacting directly with the clients was the most rewarding part of her role. In fact, some of the relationships she developed have been maintained to this day.

Dawn maintains her enthusiasm about her work primarily because Rimini Street has experienced 47 consecutive quarters of revenue growth over the past twelve years. Rimini Street's worldwide offices and customer base afford her the opportunity to be on the front line with the account managers, executives, and sales staff as they interact with a wide variety of clients and contacts. Dawn really can feel, see, and measure her accomplishments and contribution to Rimini Street's bottom line. The positive feedback that she receives from her internal stakeholders and from her participating reference customers keeps her excited. She is continually looking for ways to introduce efficiencies to the workflow and infrastructure so that her sales teams benefit when using a programmatic approach to reference requests, and the utilization of the program never fades.

Why Peer-to-Peer Selling Is Important Today

"Rimini Street, a third-party enterprise software support services company, is in a very customer-focused industry. The voice of our customers and their customer journey are the most important elements of our business model," said Dawn. "We have a robust pool of customer advocates who believe in the value of our solution. With the help of RO, we are able to customize our reference program with participation options, processes, and materials that really hammer home the point that our reference program is a valuable activity in which they want to join."

Dawn believes there is a clear relationship between reference program activity and strong advocate relationships. She says when customers feel they are personally invested in Rimini Street's success, they are willing to take MORE than the agreed upon number of calls; talk to prospects at nine pm at night; basically go the extra mile for Rimini Street because they feel so valued by the company and the program.

Dawn also believes that personal exposure and the opportunity to highlight their own company contributes to customers' willingness to participate. "Creating program activities that showcase customer advocates' success is an important message to secure participation," she says.

Dawn's Top Tips for Reference Managers:

1. Develop a relationship with your C-Level team and secure an executive sponsor.
2. Partner with your sales reps, account managers, and any other part of your company that is on the "front-line" with your customers so you not only understand the sellers' pain points, but you establish a trust relationship with your potential reference pool from the very beginning.
3. Use RO Innovation's reporting features to establish a baseline in your program; establish goals and priorities for your workload, and to demonstrate the success of your sales support, reference fulfillment, recruitment, and contribution to bottom line revenue.
4. Be creative with the reference activities you offer to align with your customers' personas and preferences.
5. Stay connected with your reference manager peers and continue to educate yourself about the industry to stay on top of innovation.

linkedin.com/in/dawnmiears

Chris Bergman
Director, Client Reference Program

Cognizant

Fostering a True Passion for Customer Reference Programs

Chris Bergman is one of those people who no matter what type of day she's having, can make the person she's talking to feel like a superstar. Her love for others and passion for what she does is a breath of fresh air.

A Passion for Starting Reference Programs

Chris Bergman is the Director of Cognizant Client Connections, which is the client advocacy program at Cognizant. She's a family woman, having raised five wonderful children. That nurturing side of her personality translates seamlessly into what she does in her professional life as well, having birthed several reference programs over the years. "I've been in this industry for twelve years. I've done small programs, I've done big ones, but starting programs is absolutely my passion. I just love it!"

Chris has worked for several large corporations over the years including Avaya, but was specifically brought into TriZetto (now Cognizant) to start the reference program. "They had humongous deals, yet the company was still managing reference requests via email and trying to track them on spreadsheets. My job was to take the program from a 'fly by the seat of your pants' setup to something that was organized and actually worked," said Chris. "A few years into the program, and TriZetto was acquired by Cognizant. The Cognizant team took a look at my program supporting 400 clients and 4000 associates, saw the value, and asked me to lead the initiative to expand it to become a global program supporting a Fortune 200 company with thousands of clients and over 250,000 associates. We're in the process right now and it is very exciting!"

Steps for Starting a Reference Program from Scratch

Given that it's her admitted passion, we just HAD TO pick Chris's brain for her biggest advice when starting a program. "Take baby steps so you're not overwhelmed," she said. "It takes 18 months to two years to really get a program off the ground and running well." The first thing Chris does when launching a program is define and evaluate what the current state of the program is and how easy it is for internal stakeholders to leverage. Once that's done, Chris starts building the program tailored to the organization's objectives and gets it up and running. Once it's "live," Chris continually showcases the program's value to executive sponsors. "Recently we had an executive stand up in a meeting and say, 'This program is the best thing that's happened to our company,'" she said. When that type of information about the success of your program gets shared across departments, clearly good things happen. Chris and her programs are living proof of that.

Chris's know-how and experience are definitely key ingredients in her success, but she admits she couldn't do what she does, as well as she does, without the help of technology. "I've talked with many people throughout the years who try to run a reference program without an effective reference management system. It can work if your program is small enough, but even then, it's not as effective as it could be," she says. Chris has used several reference management platforms in the past. When choosing one, she considers a partner who does three things really well:

1. Invests in their system: "The important thing is to pick a leader that's going to continue to invest in the system, so you can continue to focus on your job and not worry about how to make the application better."

2. Keeps you ahead of the game: "I think it's also key that whoever you're working with is progressive in terms of looking at what's happening in the world of client engagement and advocacy, so they can bring those elements and new trends into their platform."

3. Has a good product: "The provider must make it super simple to take all that data that we're compiling about clients and bring it into a single repository, so that as I'm searching for that ideal reference client for a super strategic deal, I've got all the information I need at the click of a button."

Chris Bergman is a diamond in the rough. To her, customer focus is everything and is truly her passion. She lives her passion for clients out in every task, strategy and idea she brings to the table. She is truly a professional you want in your network, a friend you are blessed to have in your life, and an employee that drives incredible value through the programs she runs at her organizations.

Therese Van Ryne

Director of Global Public Relations & Customer Reference Program

ZEBRA

Breaking News: There's a PR Star Rising in the Global Reference Community

It's not very often you hear of someone going from Capitol Hill news anchor/reporter to running global PR at a Fortune 1000 IT company. That's what makes the career journey of Therese Van Ryne, Head of Global Public Relations and the Customer Reference Program at Zebra Technologies, so interesting.

Therese Van Ryne had always dreamed of being a news anchor. "Early in my career, I moved out to Washington, D.C. to pursue my broadcast career. I absolutely loved it! When I got married and we started our family, I decided to pivot from broadcast journalism to public relations," she said. "We moved back to the Midwest, and I have had the pleasure to work with a number of top companies. I really enjoy what I do!"

Just weeks into Therese's role at Zebra, she realized that Zebra didn't have a reference program. "It was frustrating not having a database of customers to draw on. It's so important to PR, marketing, you name it," she said. That's when she approached her manager to say, "I love leading the global PR team, and I would like to expand my role to start a reference program." Her manager agreed there was a need, but like most companies, Zebra had limited headcount. "I ended up bringing on a contractor to help us figure out where to start and evaluate different tools like RO Innovation. We were able to get up to speed quite quickly to recruit references, and today have a successful program managed by a full-time Zebra team member."

Being Your Program's Own PR Pro

Therese enjoys recruiting new customer references and bringing customer testimonials to life, and she says it's also been fun uncovering internal employee ambassadors for the program. She has put her PR skills to work in promoting the reference program at her company, including creating a promo video. "One of our sales team members did a short video testimonial for us. He was behind the wheel (as so many sales people are today) and he says, 'Okay, are you ready for this? Are you sitting down? Ask for the reference!'" With the RO-Salesforce integration, not only can Therese's team fulfill more requests, but they regularly get feedback on how easy it is to submit requests and get information quickly from her team.

Therese's PR background also enables her to take an innovative approach to add value to the program. For example, she discovered there's a form in Salesforce that the account team has to complete whenever they ask for a price concession. She immediately saw an opportunity and added a field to the form asking, Did you ask for a customer reference?' If a customer's asking for a discount, it's the perfect time to approach them to be a reference to share their thoughts on the true value of Zebra's offering. It has now become part of the Zebra process to include a reference discussion in these negotiations.

When it comes to reference recruitment, Therese has also found success building off Zebra's bi-annual NPS survey. Any person, whether a customer or a partner, who rates Zebra highly is asked about his or her interest in discussing our customer reference program. Through this unique approach, Zebra has added new references to serve as ambassadors for the company and its innovative solutions.

Therese has made a career making an impact. She helps drive the course of the industry and continually brings new innovative ideas to the table. "I think reference management and customer advocacy are such a nice fit for PR people because similar to PR measurement, we are all on a journey to deliver the best results for our companies. Through securing references and tying it to business impact, it's definitely a step in the right direction."

linkedin.com/in/theresevanryne

Trish Borrmann
Director of Customer Marketing Programs

FORTINET

Starting Customer Reference Programs with the Right Strategies

It's a common story. One that's unfortunately repeated all too often. One or two people in various departments "do" a little bit of reference match-making here and there, but it's done as one of many responsibilities and never their full-time jobs. The faster the company grows, the greater the need for references becomes. Eventually there's a tipping point and the company decides, "Gee, I guess we DO need a dedicated person to manage all this!" So they hire a rock star like Trish Borrmann, Director of Customer Marketing Programs at Fortinet. And then REAL magic happens.

Fortinet was growing very quickly and continues to do so, therefore using Excel spreadsheets to track customer reference activity details was no way to scale. "I have built out a lot of aspects of the program over the past three years, from the implementation of RO Innovation as our centralized reference database to dramatically expanding our published references and industry speaking program," says Trish.

Fortinet has hundreds of products and over 360,000 customers. "It would be impossible to track all those customer details effectively without a platform built specifically for it, like RO Innovation," says Trish. "We needed to be able to track a large number of details – who wants to do which activity, who's suited for it, when do they want to do it, how often. It's a lot! A purpose-built system works better and really made more sense than building something in-house."

Enabling the Global Sales Team: Crawl, Walk, Run

When it comes to getting adoption of your program from the sales team, a solid strategy is to build a few key internal advocates – particularly from executive stakeholders.

"When we rolled out the RO Innovation solution, we initially only gave access to our U.S. sales team. Even though we're a global company with salespeople around the world, we decided to start with a pilot in the U.S. so we could prove it out, work out the kinks, and show everyone how successful it could be," explained Trish. "It got off the ground quickly because our SVP of North American sales was a great advocate. He allowed me to present on some of his quarterly all-hands calls. Those calls have a limited number of people allowed on the agenda, so it was very effective and really showcased his endorsement that he wanted his team participating in this program from the very beginning." Trish also supported initial sales user adoption through demos, regional team calls and frequent trainings of the RO Innovation system.

After a few quarters of a "pilot program" in the U.S. Trish's team expanded it to the global sales force. "One thing that really caught our Global Head of Sales' eye was the Sales Win function," says Trish. Historically, when it came to sales outcomes, salespeople had been emailing their wins around. "There hadn't been a good system to track them. Unless you had that information in your email, you didn't have the tribal knowledge or insights into the ways your peers were winning deals or making progress with new products." Trish says the Global Head of Sales loved how the RO Innovation system could store all of these documents and make them more consistent, accessible, and shareable.

"He's fully adopted it and made it a requirement. If salespeople want their Sales Win to be shared to the entire sales force, it has to be submitted through the RO tool." With his endorsement and change in process, Trish says they've seen a massive increase in submissions compared to the email versions of the prior method.

As if this example wasn't enough, Trish is truly an expert at identifying opportunities to add value to the customer marketing program's stakeholders and users and aligning their needs with benefits she can provide. It is her approach of helping others be successful that in turn makes the programs she oversees so effective.

Trish's User Adoption Tip:

"Start small. Teach your sales force one or two functions of RO Innovation at a time. Don't expect they'll use it all if you throw everything at them at once. It'll be too overwhelming."

Advice from Our Upland RO Innovation Staff

What Can You Do to Elevate Your Reference Program?

The year is drawing to a close. Time for new resolutions and goals for your program. Dreaming big is great…but how do you make those plans a reality? Lisa Hoesel, Upland RO's Own Reference Enablement SME, shares some ideas to make 2019 a spectacular year for you and your program.

Make a plan for new stakeholder needs. Conduct periodic 'pulse' checks with your sales leadership, enablement/ops teams, and Customer Success groups to ask them what information their buyers and customers are asking them to provide in sales cycles and in regular customer support checks. Conduct a gap analysis of the content of your program to make sure that you have the collateral that maps to those needs.

Harness more insights. Consider providing access (licenses) to key customer relationship managers so that they can add notes relating to the health status and satisfaction of your reference participants and/or nominate new voices to your program. Who interacts most with your customers after they have purchased your solution? What new reference contacts could they nominate as participants? What insight could they provide about unique use cases; testimonial 'nuggets', etc. that you may be able to add as activities and content?

Dive deeper on what matters. Are you providing just the requested reports to your management? What other metrics can you derive from your reporting modules that would help you demonstrate the impact of your program on revenue, increased customer renewal and loyalty, buyer engagement, and additional topics that your organization needs to address, (gaps in your content vis-à-vis sales rep needs and buyer questions, etc.)? Take some time to explore your reporting options and share what you find.

Stay top of mind with users. Consider turning on a 'feed' that reminds users that you are constantly bringing fresh content and reference customers into your program. Use internal spotlights to share new case studies, customer profiles, sales wins and sales support collateral so that you can measure your users' engagement with new content. Compare engagement on these pieces with what your buyers are consuming to provide very insightful metrics to leadership about what is important to support sales success versus buyer interest.

Give customers the stage. If you are not already joined at the hip with your events team, CAB managers, and webinar teams, buy them coffee as quickly as you can! In addition to your customer success and support teams, these individuals are often close to customers who want to share their voices and insights with others! In exchange for a seat on an advisory board or access to your executives, many senior level customers are more than willing to share their success with your products as speakers at events. They just may not be aware that you have available opportunities.

Learning never ends. I have had that phrase in a frame on my desk forever. Product messaging changes. Sales methodology changes. BUYERS change. As your program grows, the activities in which you offer for customer reference participation may expand. RO Innovation solutions are configurable because we want to help you adapt to the changes in YOUR world and the innovations in the reference management discipline!

Lisa Hoesel
Solutions Consultant and Reference Manager
upland

What's Your Favorite Thing About the Upland RO Innovation Platform?

We were curious about which features of the Upland RO Innovation platform our staff loved and how they used them – so we asked a few!

Here's what we found.

The Spotlight Feature for Sellers

"Having insight to what my prospects are interested in after I conduct a demo by receiving notification of their Spotlight visits and engagement with specific content about our solutions, helps me prioritize my pipeline and really understand what steps I need to take next in my sales cycle and communication with buyers."

Jill Cohen
Account Executive
upland

CRM Integration

"Having the right content and the right reference customer 'spoon-fed' to the salesperson directly on the Opportunity record is a game changer. Helping our customers configure the RO Sales Enablement module so that their sellers are no longer having to search multiple locations for data and references is one of the most satisfying parts of my implementation and configuration role."

Jason Goetz
Project Manager
upland

Track Content Feature

"Showing my customers how easy it is to track different parts of their work by using the Track Content Feature is very satisfying to me. Whether you are working on developing a case study or recruiting a new customer to your reference program, individualized steps and assignment can be configured for each type of asset and activity, so that you can report out on your progress; analyze the time it takes to complete all of the different type of work that you have to do to manage a reference program; and report out on your success through dashboards or our reports module."

Tegan Skorupski
Customer Success Manager
upland

Finding a Unique Story

"While I am still learning the platform, I am thrilled at how easy it is to find customers who are open to sharing stories and quotes and taking part in analyst and press activities. I can also identify those who have already given their voices to interesting and unique Qvidian and RO use cases. For a busy marketing team, having all the best stories in one trusted location, is a significant time saver."

Kevin MacKenzie
Product Marketing Manager
upland

We Asked Customer Reference Leaders

What tips would you offer your fellow peers?

And here are some of their responses...

"Track and report everything. That's how our team can tie millions in revenue to the influence of references each year. It's rewarding knowing exactly how much your work is impacting the business."

Rae Harrison
Manager
Global Customer Reference Programs

paloalto NETWORKS

"Do not enable people to take your time that you could be spending building customer relationships instead. Reference managers need to rid themselves of the one-off requests. Trust me, no salesperson ever lost sleep from entering their request in the [RO Innovation] system."

Zoe Meyer
Operations Manager
Global Customer Advocacy Program

COMMVAULT

"Will you be a reference? is not effective enough to get people excited about your program. Instead, approach it like a nomination: 'Congratulations, someone has nominated you as a reference, will you please accept this honor?' You will be more successful at recruiting customers to your program if you make it about them and it sounds like an opportunity."

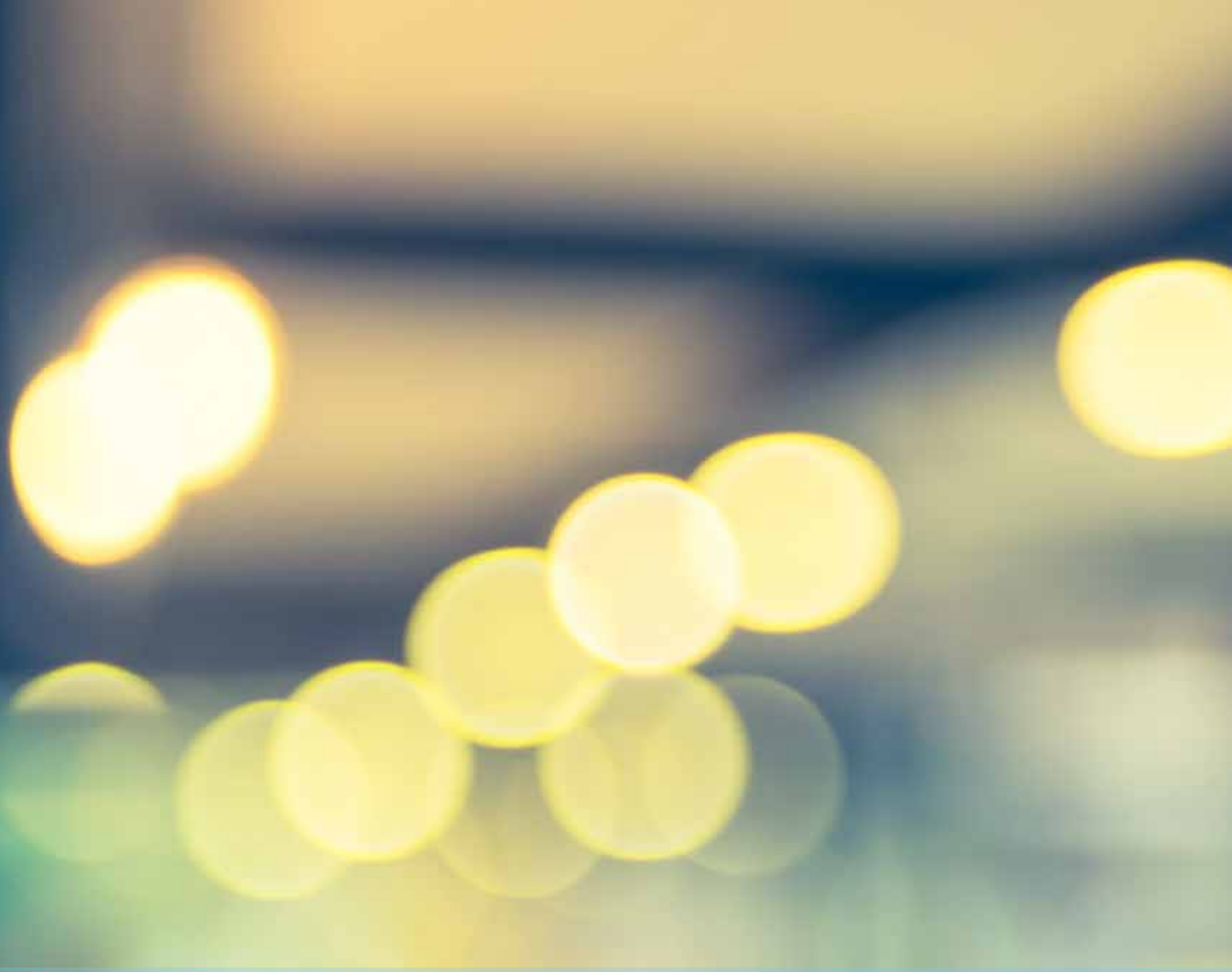
Barbara Thomas
Customer Advocacy Team Lead

yesler

"A successful reference manager can build a deep relationship with anyone – even the trash man! You can't do this job without that skill. You must be able to get that internal win via a relationship before anything else can happen."

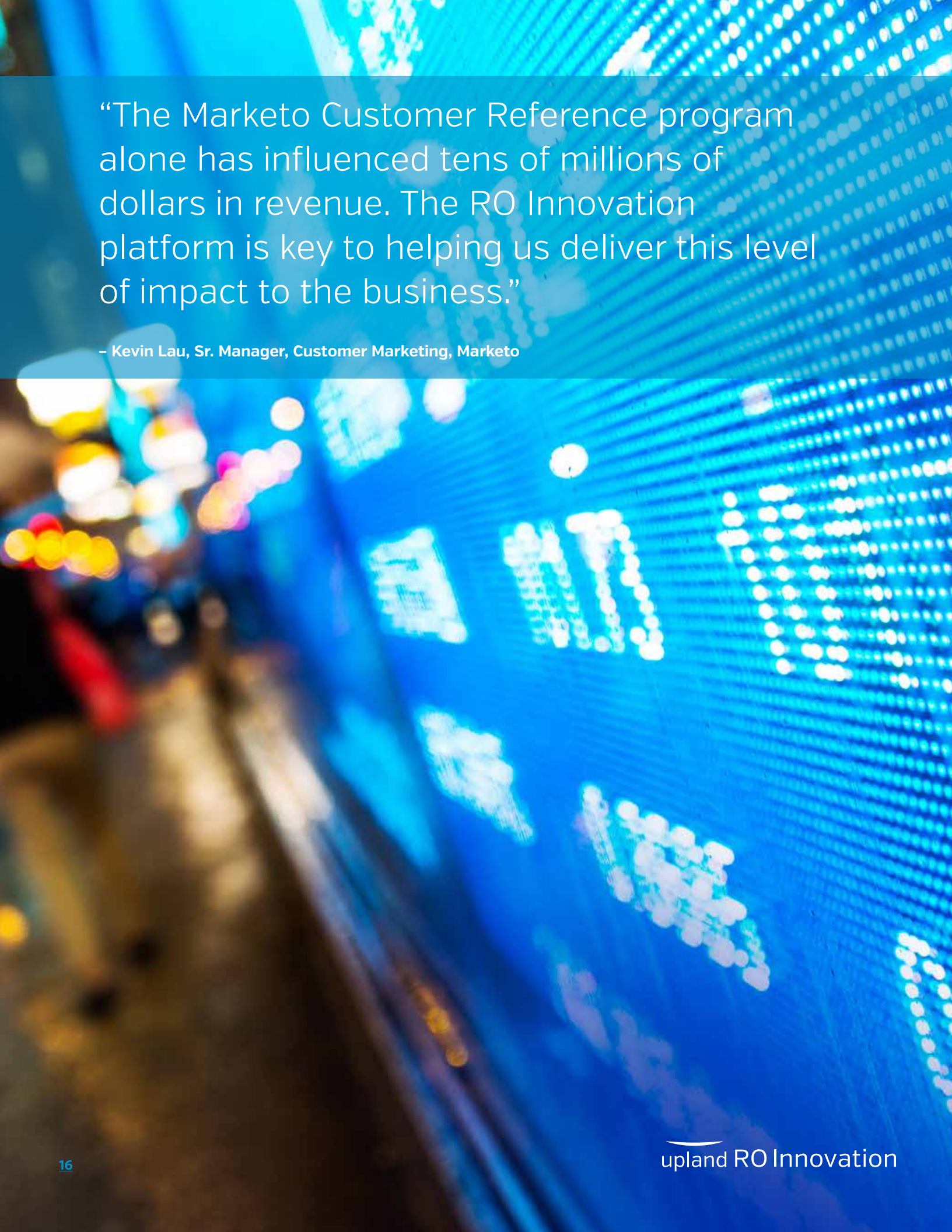
Mary Ketter
Global Customer Reference Manager

jda.



“The customer marketing team increased the number of qualified, referenceable customer contacts by 54%, which was almost 3 times more than the team’s goal!”

– Mary Ketter, Global Customer Reference Manager, JDA Software



"The Marketo Customer Reference program alone has influenced tens of millions of dollars in revenue. The RO Innovation platform is key to helping us deliver this level of impact to the business."

– Kevin Lau, Sr. Manager, Customer Marketing, Marketo

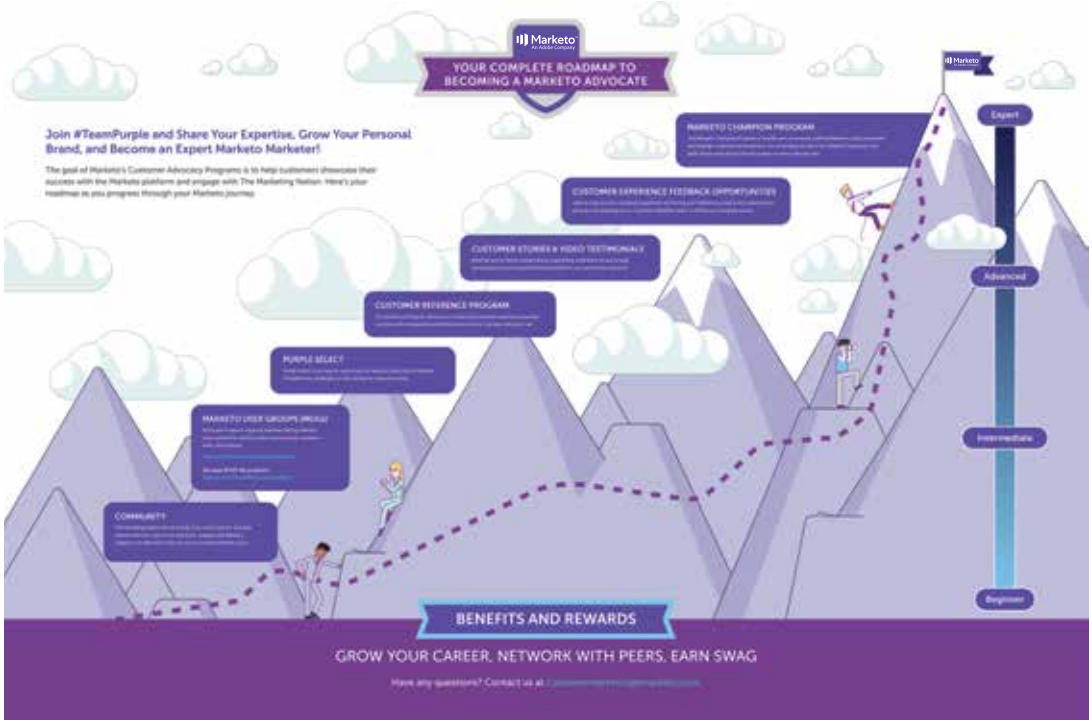
2018 Sherpa Awards
Best in Class
Customer Advocacy Program

Climbing to the Peak of Marketo's Customer Advocacy Program

Over the past few years, Marketo has built a comprehensive Customer Advocacy Program, encompassing everything from their online advocate hub, customer reference program, regional Marketo User groups, to elite advocate programs, and a new advocacy nurture program. The Marketo Customer Marketing team aims to communicate and engage with customers at every point of their journey and continually provide opportunities to help them become Marketo advocates.

Marketo™
An Adobe Company

The Marketo Customer Advocacy Program offers customers a variety of ways to participate and showcase their success. The program is structured in a tiered format, which is presented to customers in an easy-to-understand visual "roadmap" that explains the various benefits and rewards associated with each activity. Today, the combination of programs and activities offered, engage close to half of Marketo's large customer base and is growing every day.



2018 Sherpa Awards
Best in Class
Customer Advocacy Program

Marketo™
An Adobe Company

Chilling at Basecamp

The Marketo Customer Marketing team leverages several technology platforms to support their customer advocacy activities. Purple Select, an online advocate engagement hub powered by Influitive, is used as an introductory stage in Marketo's advocacy initiatives and is built around engaging advocates via gamifying challenges.

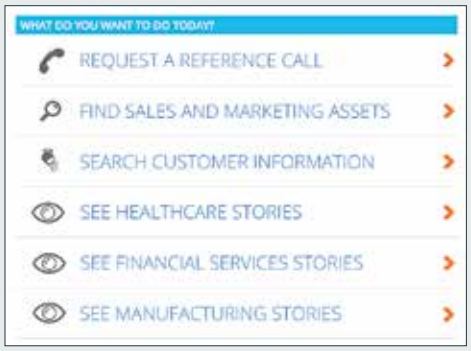
Advocates complete challenges that are related to Marketo and earn points that they can redeem for Marketo swag. The Customer Marketing team also uses Purple Select to share best practices, tips, and publicize upcoming Marketo events. Marketo currently has over 3,000 advocates engaged in Purple Select and posts new challenges every other day.

Mid-Point Checks

As Purple Select creates an online hub for Marketo's advocates, the Customer Reference Program connects advocates with Marketo's Sales and Customer Success organizations. The Reference program, supported via the RO Innovation platform, allows the Customer Marketing team to field and fulfill reference requests to support both new and renewal deals.

Marketo's instance of RO Innovation, branded as Advocate Vault, connects Account Executives and Customer Success Managers with Marketo's top advocates and most successful customers. Through this program, prospective customers can hear firsthand how other companies are using Marketo as their core engagement platform to drive success. The Marketo Customer Reference program alone has influenced tens of millions of dollars in revenue in just the past few years.

In addition to the programs above, the Marketo Customer Marketing team manages the Marketo User Group (MUG) program, which are regional meet-ups of Marketo end users focused on sharing best practices, tips and tricks, and product adoption strategies. The Marketo MUG program engages close to 1,000 Marketo advocates worldwide.



The MUGs have allowed more grassroots level advocacy, as these meetings are open to both customers and prospects. Marketo's MUG leaders have also proven to be some of the most active advocates, often participating in Purple Select, the Reference Program, and one of Marketo's elite advocate programs, Marketo Champions. Given the high levels of participation, the MUG program has been essential in fostering peer-to-peer advocate engagement.

2018 Sherpa Awards
Best in Class
Customer Advocacy Program

Celebration at the Peak

Then there's that elite group of advocates that every company wants to have. The ones that are the extension of your sales and marketing teams and go the extra mile because they are so passionate about your product and brand, and invested in the value you provide.

The Marketo Champion Program is a select group of top Marketo users from around the globe who are Marketo Certified Experts and the chief end users in their respective companies. Marketo Champions have been pivotal in Marketo's Customer Advocacy Program as they've become trusted brand ambassadors and thought leaders.

During the 2018 Marketing Nation Summit, Marketo Champions presented more than half of the customer-led speaking sessions and workshops on campaign strategy, advanced marketing analytics, and adoption of the Marketo platform, receiving some of the highest ratings from conference attendees. Champions also participate in Marketo's field marketing events and drive discussion and best practice sharing on Marketo's online forums.

On the Horizon

As Marketo looks ahead, the Customer Marketing team plans to leverage their own Marketo instance to launch an Advocate Nurture Program. It will enable customers to learn more about various advocacy opportunities and ways to showcase their success. Through consistent communication, customers will be encouraged to participate in Marketo's various advocacy programs and schedule a call with the Customer Marketing team to explore more ways to engage with Marketo and fellow advocates. Once they become an active advocate, Marketo will continue to keep them updated on the latest customer opportunities via the Marketo Customer Advocacy Newsletter.

The Marketo Customer Marketing team focuses on ensuring that advocates have unique opportunities to engage at every stage of their customer journey, along with increasing investment in advocacy programs and technologies. The result is a best-in-class program which truly positions them for success now and for years to come.

2018 Sherpa Awards
Outstanding Executive Leadership

New Leadership Change Creates Huge Momentum at Rimini Street

As the VP of Client Success, Will Toms works every day to ensure Rimini Street puts the customer first. He knows that a 'customer centric' mission, when implemented correctly throughout every touchpoint in the customer journey leads to high performing companies – both in new revenue and in customer retention. Will has created a transformation at Rimini Street through the vision he inspires, by reaching out to others and building relationships, and making sure all employees can create a movement centered around the customer.

Rimini Street®

Engineered for Support™

Changing Status Quo – From Tactical to Strategic

Like many growing companies, the customer reference team's direct manager has changed several times over the years. But unlike most companies, Rimini's reference team has always resided within the Sales organization. As such, the main function of the customer reference team has historically been tactical, focusing mostly on supporting the sales team with day-to-day customer reference requests. Yet with 34 consecutive quarters of 30+% increase in revenue, and a sales force that has grown by approximately 300% over the past 5 years, the customer reference team was so encumbered by request fulfillment and daily tasks that it was difficult to make significant progress on much else.

Launching RO Innovation in 2017 was vital to the reference team's productivity. Not only did it help scale the reference program to help meet the increased volume of requests, it helped the team improve processes and workflows within the organization. This tactical improvement was a huge step forward in creating more bandwidth for the team to concentrate strategically on the reference program. And it couldn't have come at a better time.

In 2018, Rimini Street's executive leadership reshaped initiatives. Retention and increasing the value delivered to customers through upsell and cross sell initiatives became major areas of customer focus. Rimini's CEO put Will Toms at the forefront of developing a Global Client Advocacy Program to support this corporate initiative: a task that involved coordination between several teams and a comprehensive 'customer first' strategy, including all processes, tools and resources needed to make it successful.

Will Toms' Strategic Vision Creates Rapid Changes

As Marketo looks ahead, the Customer Marketing team plans to leverage With the customer reference team now reporting directly to Will, he was able to finally help them move out of the tactical box they had been operating in and created strategic direction for the program. "The customer reference team is an absolutely integral part of Rimini Street's Global Customer Advocacy Program," said Will Toms. "But it's also important the company understands there is more value the reference program provides beyond request fulfillment."

Will improved communications within cross-functional teams, creating better collaboration on projects and greater understanding of the benefits the program provides each department. For example, the client reference team is now included on strategy sessions when new services are being rolled out so they can proactively provide support and testimonials from the advocate base for the sales team.

Metrics and analytics have also been streamlined. Since Will reports directly to the CEO, the reference metrics he shares on the executive dashboard get right into the meaty stuff, highlighting strategic business impact and tactical progress like a 50% increase in just one" or "a single" product line's reference contacts and a 40% increase in reference requests YoY. With this type of evidence, Will has secured additional funding for the program, including budget for additional headcount.

Will's coordination with the reference and sales teams has improved processes and formalized workflows in a short period of time, providing additional protection against reference overuse. Furthermore, his relationships and good rapport with the sales leadership team serve as a conduits for getting Sales to release their notorious 'back pocket references'. His efforts have helped increase reference recruitment at least 8% (rp) this year alone. He is also strategically placing references in a more proactive role in the sales process, facilitating the reference team involvement with regional sales management meetings to remind the sales team of the help the reference team can provide during busy contract renewal seasons and help eliminate last minute issues for the reference team.

"Will has encouraged innovation within the reference team," said Rosan Primeau, Global Client Reference Manager. "He incorporates suggestions of others on his strategy roadmaps, and has helped our team ensure the future success of Rimini Street's Global Client Reference Program. I am really lucky to work with him."

2018 Sherpa Awards
Most Valued Program

IBM's: Big Names and Interesting Things (BNAIT)

Each month IBM creates several hundred client reference assets that highlight the gains clients achieved by adopting IBM solutions and services. While there's an existing RO database that features these assets– Client Success Central (CSC) –it is difficult to ascertain which are the most compelling new assets created each month without insider knowledge. To help ensure that marketers, sellers and teams developing RFPs have up-to-date knowledge on these new assets, IBM developed an easy-to-consume monthly newsletter that features THE COOLEST ONES and puts these valuable resources at the fingertips of those most in need.

The Challenge of Finding Stuff

IBM creates high-quality client reference assets each month–but if they are not readily or easily found, their value is lost. Ensuring knowledge of and easy access to these assets to marketers and sellers in a timely manner has been a difficult challenge. The CSC is an excellent database that features these resources, but marketers and sellers often don't have time to conduct searches to find exactly what they need–rather, they want immediate access to the freshest, most compelling client references sent directly to them. This also acquaints them with the awesome resources the client reference team provides, SELLS the program, and entices them to look further.

BNAIT – Not the Typical Email Newsletter

Big Names and Interesting Things (BNAIT) is a monthly update created to feature select, new client reference assets. It is sent to senior executives and representatives from Industry Marketing, Sales and Corporate Marketing. With BNAIT, all of these teams are updated monthly on new STRATEGIC AND COMPELLING customer references, videos, case studies, IBM Client Field Notes "blogs", animated GIFs for social tiles and client advocates willing to promote IBM. This information can be used to help identify clients to be featured in advertising, at events, in social media or video campaigns–as well as help build compelling cases for sales. Additionally, through links within the listings, BNAIT drives readers to the CSC, thereby increasing IBMer knowledge of this valuable resource. Archived copies of BNAIT are kept in the internal client reference community for those wishing to easily find past newsletters.

Rave Reviews and Outstanding Open Rates

While BNAIT is a relatively new program that has been in operation for less than a year, it has an open rate of more than double the average for comparable email newsletters–73% compared to the 30% average. Illustrative of her endorsement for BNAIT, Ann Rubin, Vice President, IBM Corporate Marketing, sent a BNAIT update to her entire team suggesting they join the distribution list. Each month, additional IBMers request to join, while feedback from recipients has been overwhelmingly positive:

"I love it!"

Pascale Terrosi, Community Manager, Global Consumer Industry

"I'm a member of the Industries team, and I passed along to the greater editorial team. We're trying to focus/partner more with clients, and this is a great resource."

Arzi Rachmam, Social Strategist-Industries, MSC

"This is great!"

Jennifer Hernandez, Content Director, NA Industrial Market

"I just started receiving those emails, but I'd love to peruse some of the older ones.... I'm desperately seeking a client reference for a project (on a tight deadline) and the more resources I could have, the better!"

Jordan Teicher, Content Producer, IBMORIGINALS

"Great update!"

Jean C. Gleason, Advertising Manager, Worldwide Advertising

"It's helpful to have a digest of the most recent information."

Tom Farre, Senior Writer, MSC

The IBM Client Reference team produces over 3,000 references, 1,000 standard case studies, and hundreds of videos per year. Their BNAIT initiative is not only super successful in serving relevant content up to its internal user base, but it can also be scaled for any size program – large or small.

2018 Sherpa Awards
Most Improved Program

From Tactical to Strategic: Informatica's Transformational Journey

Informatica is going through a data-driven digital transformation. As a 25-year old Enterprise Software company, Informatica needed to transform its products and its business model. While they've offered SaaS, subscription-based Cloud services since 2006, the majority of their solutions were still primarily on-premises, perpetual license solutions. This was the primary catalyst for Informatica's P/E-backed privatization in 2015. No longer under the quarterly public microscope from Wall Street, they've been able to accelerate this transformation significantly.

Informatica™

With the eventual goal to once again IPO and be a publicly traded company, the Informatica brand also needed to transform. Market perception of the company's strategic value – both today, and in the future is critical to the success of their journey. Informatica's board of directors and executives have prioritized Customer Advocacy as a key strategy: Informatica's customer stories are the proof points to the market that Informatica is a strategic vendor for the biggest brands across all industries around the world.

New Initiatives Don't Come Without Challenges

While the Customer Advocacy team was thrilled about the new direction the company was taking, executing against the strategy came with its own set of challenges.

The majority of Informatica's "references" were held in Excel spreadsheets maintained by several different people throughout the organization and regions. Those spreadsheets gave a view of a particular product segment of the business or region, not a holistic view. There was a perception that no one single group owned the customer advocacy process, plus there was no clearly defined structure or objectives established and no single repository to show a true inventory of advocates or digital assets. Most telling was that no leader was asking for advocacy metrics, illustrating the lower strategic priority at that time. Even with these limitations, the prior references teams did an admirable job collecting hundreds of references and building strong relationships and valuable stories.

Another challenge that needed constant re-education was around "sourcing" potential advocates and who was in the best position to introduce the subject, identifying "Advocacy Milestones" along the customer's journey.

The Advocacy team didn't have the visibility into a "true" data set for a long time and that presented credibility concerns. Since they knew they were on-boarding RO Innovation as their partner for managing the customer reference system, the team chose to focus on delivering a wide variety of customer assets that would deliver immediate value to their sales and marketing partners.

Key Alliances Make Progress Possible

A critical point of interlock started with the Portfolio (Product) Marketing team who owned several of the customer reference spreadsheets. Linking the Advocacy team's efforts to match their needs for Product Marketing content and speakers for sponsored events allowed the team to take the first steps in building a foundation.

Next, the Advocacy team aligned themselves with the Sales Enablement team to deliver Customer Success Stories that spoke to a holistic customer experience, since Informatica's sales focus had shifted to more storytelling and solution selling instead of product selling.

The Advocacy team also aligned themselves with the sales and marketing Go To Market plans and campaigns, also known as Customer Journeys, in order to stay ahead of what the Field might require once a campaign was "in market".

Personal outreach made this all possible. Engaging with the respective global Field Marketing leads, Sales Leaders, and Business Segment Leaders made this direction possible, and the team is not finished yet!

Making an Impact

The Advocacy team's focus is in direct alignment with their Portfolio Marketing and Sales Enablement efforts to focus on the Customer Journeys, not a product inventory. Meaning, Informatica realized their products and solutions follow a progressive implementation "journey" or solution path. Based on those Journeys, sales tools and processes were created and shared across their Field organization. They looked at their Advocates and Assets and realized there was an opportunity to align along the same product/solution Journeys.

To help manage the Advocate and Asset database and make the process more accessible to the sales force, Informatica deployed Reference Connection (what they've branded the RO Innovation platform internally), a single repository for Advocates and Assets, that links directly to Salesforce allowing a sales rep and other customer-facing employees to request, search and nominate in a couple of clicks.

Through all of this change, the Informatica Customer Advocacy team has maintained a 97% sales request fulfillment rate from 2017 to Q3 of 2018 and has delivered over 60% year of year growth in net new advocates for the company. These results have built even more internal confidence in the advocacy process, and is ensuring that Informatica will have the customer stories and references needed to accelerate their transformation.

2018 Sherpa Awards
Best Advocate Engagement

Inside IBM's Engagement Strategy Generating 80+ Customer Advocate Videos in Less Than 6 Months

Onboarding clients as advocates has traditionally been accomplished through a slow crawl: email campaigns, pushing on sellers and partners, chasing would-be advocates in a one-by-one world. Oftentimes, the outgoing message is wrong or ineffective: asking for favors and other one-way needs that benefit us, but not the client.

Therein lies the problem. In a better world, we would not only sign up advocates at a much higher rate than one at a time, but also actually provide them with something they would like. Something that would be beneficial to them.

In today's world of socializing just about everything we do, the use of video has risen to the top as the preferred method for storytelling. As a key part of the ongoing social revolution, clients have become much more comfortable with sharing their successes and stories in front of the camera. IBM tapped into that, and it paid off big time!

A Shift in Strategy

IBM totally disrupted all their prior ways of capturing advocates. They offered clients the opportunity to be videotaped at key events to share their story. They invested in top level writers and interviewers (and even their own video equipment to allow quantity within a budget) to work with the clients to create a matching blog to go along with the video. They created the IBM Field Notes site on ibm.com to showcase these stories (www.ibm.com/blogs/client-voices),and have a social animation process to drive traffic to the site.

And just as important, IBM totally changed the approach for obtaining external-use content approval to drastically improve the turnaround time for posting and publishing these assets.

These changes, combined with shifts in process, created a new dynamic for IBM. They no longer had the long lag times of producing an asset then waiting 10 months for an approval (or even sometimes, never getting it). They had bona fide advocates through the face-to-face interactions and investment in video storytelling.

IBM then raised the advocacy to a higher level, by connecting the dots and integrating this work with blogs, new references in the RO system, case study candidates for business units, speaking engagements, and in a few cases this content was picked up and repurposed in executive remarks and cable news outlets.

Most videos were packaged with animated GIFs and matching blog posts by-lined by the clients. This package was further amplified on various platforms like: Get Social Hub, push notes via email, Social Content Library, IBM brand social channels like Twitter, Facebook and LinkedIn, Slack communities, external IBM case study pages and special coverage on the ibm.com homepage. The amplifications are further boosted by posting on the internal industry wiki and by sharing with IBM clients to tweet about the Field Notes posts on their company/personal twitter handles.

Impact to the Business

These videos have been invaluable to IBM. Many times, usage of client references cannot be fully tracked or understood. Once in a while, we get a glimpse of how a reference was used on its journey in various media.

One such example is the Montgomery County Juvenile Courts. Utilizing the process above, IBM created a video of this client at an industry event, and published it on ibm.com, along with the blog post and then kicked off the social processes. Other teams within IBM picked up the story and created various campaigns around the story. In addition to creating a new reference in the IBM RO system, this example grew even bigger by being mentioned in executive remarks, all hands calls by senior LOB executives, and was the focus of a CNN feature story.

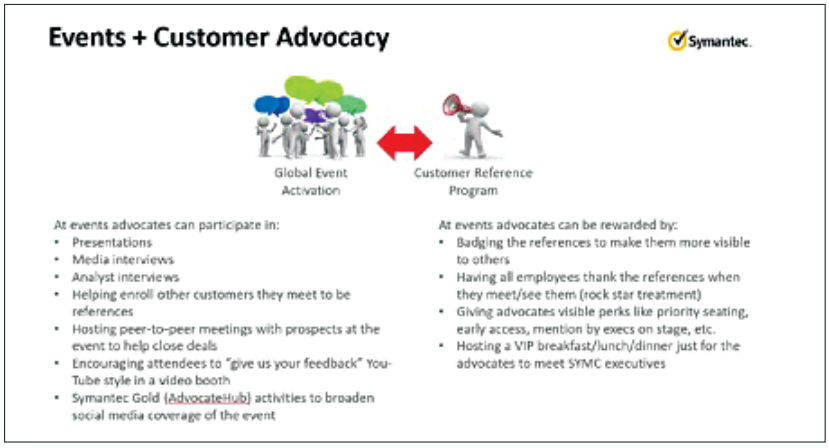
2018 Sherpa Awards
Rising Star

Increased Collaboration: Driving a Successful Advocacy Program at Symantec

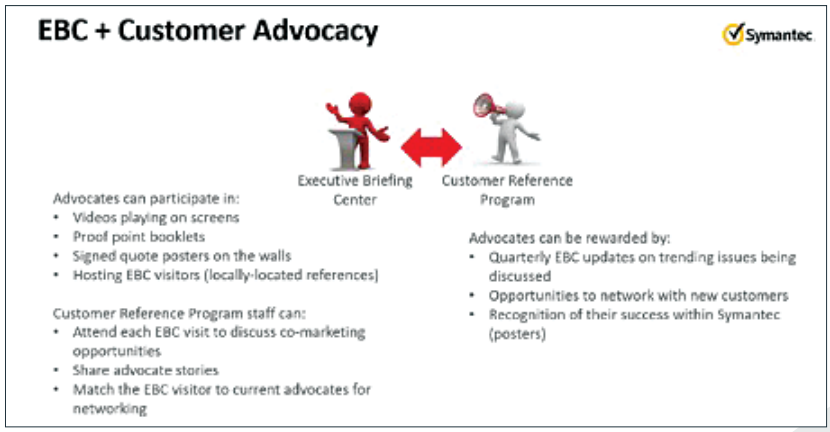
Towards the end of 2017, the Symantec Customer Advocacy Program had been established as a high-performing but little-known function within the marketing organization. With just 6 months of exposure to the world of advocacy, Richard Clooke, Senior Marketing Manager at Symantec, was asked to take on the monumental task of running the program and seeing it become embedded in organizational processes across the company.

"Since 2009 I've worked across PR, channel, product and content marketing at Symantec – as well as five years on the global brand and events teams – and so understanding customer pain points, product messaging and our corporate story have been critical," says Richard Clooke, Symantec. "Meaningful collaboration and strong communication have always been instrumental to everything I've done, and that seemed equally crucial to a successful advocacy program."

Richard started by working with his direct peers to find ways that he could help them leverage the voice of the customer, and ways in which the advocates would benefit from the interactions. He put together plans that summarized these benefits in concise formats and embarked on a program to communicate those across the wider Symantec product, sales and marketing organizations.



Having established effective engagement with his peers, Rich moved on from department to department throughout Marketing to form bonds and active participation from all of them. The advocacy team is now closely aligned with the Executive events organization allowing much greater visibility to the top tier customers. Additionally, User Groups have also been moved under his responsibility, resulting in a more focused promotion of the Advocacy Program to meeting attendees.



Knowing that the program would need more resources as more and more internal people started to leverage it, he put faith in his manager to support his outreach efforts and was rewarded with full time staff to work alongside the agency team already in place.

Rich continues to evangelize the advocacy program throughout the organization; attracting groups to add customer evidence into their processes like a "pied piper." His opening question to new internal contacts is always, "How can I help you leverage our advocates?"

The number of approved advocates has increased by 43% since Rich took over. With the closer alignment and collaboration with Analyst Relations and Marketing teams, requests from those teams have increased 57% over the same period.

With an easy-going style and good sense of humor to relieve the tensions of the day, Rich has garnered a phenomenal amount of support for the program and the effort that he's putting in, here's a couple of comments from colleagues:

"Rich has really jumped in with both feet and brought Symantec's Customer Reference program to a new level. He's tireless in trying to get us the best customers to precisely meet the reference criteria we've set out and never questions the need for the strong references for analysts. He's really the leader we need in this role."
-Tony Taddei, Vice President, Analyst Relations, Symantec Corporation

"Rich is amazing! He has an incredible work ethic, a tireless pursuit of achievement in his role, is absolutely effective, and always willing to help out."
-Ellen Roeckl, Vice President, Corporate Marketing, Symantec Corporation

Rich has definitely made a positive impression on so many at Symantec, and the results he's driving in the customer reference program are clearly a direct result of his hard work. We look forward to seeing great things from this customer advocacy "newbie"!

2018 Sherpa Awards
Innovative Feature Use

Fortinet Increases User Adoption 500% with New Sales Wins Strategy

Fortinet is a high-growth company in the dynamic cybersecurity space. They are constantly hiring and on-boarding new sales people who need to get up to speed quickly on the company's wide array of security products and services. Educating the growing sales force on how their peers are winning deals is an important part of sales enablement and education.

FORTINET®

Trish Borrmann, Director of Customer Marketing Programs at Fortinet, saw an opportunity to leverage the RO Innovation Sales Win tool to help share this tribal knowledge while increasing user adoption of the platform itself. Trish had been tapped to work on a cross-functional team focusing on streamlining sales communications. She saw an opportunity to accomplish two goals with the Sales Win feature:

1. Having the global sales team enter key wins into RO Innovation would make them searchable as resources for new sales people to learn from.
2. Using RO Innovation's centralized repository and publishing tool would streamline communicating this information to Sales in a consistent, repeatable and polished format.

The Winning Game Plan

Trish worked with the Sales leadership team to gain agreement that all Sales Wins would be required to be entered and published through the RO Innovation Sales Win tool. To reinforce this policy, the Sales leaders agreed that all wins would be distributed internally from a central point of contact – the Customer Marketing Programs team – creating a gating factor for quality control and streamlining communication to the sales force.

Trish also updated the Sales Win template to capture even more valuable information, such as technical and business benefits the customer expected to achieve. Since RO Innovation was integrated with Fortinet's Salesforce instance, Trish could ensure entering wins was convenient and consistent for Sales: many fields of the Sales Wins forms were pre-populated from the Salesforce account record and pick lists ensured consistency in terms that could be searched and reported on.

The new Sales Wins policy was shared across the sales teams in an announcement from the Head of Sales, and reminders in internal newsletters. The wins began to pour in. User adoption of the feature increased dramatically. The number of submissions through the tool jumped by over 500% compared to the previous average per quarter, not to mention the library of Sales Wins to learn from has quadrupled in just 3 quarters of this new process.

The Wins Continue to Pile Up

Sales reps are motivated to use the Sales Wins tool by their desire to share their success internally, recognize their team members who helped with the win, as well as to satisfy requests from sales leadership to share what selling techniques and market differentiators are helping close deals. They also love the ease of entering this information without having to worry about the formatting, as the tool produces a polished, branded PDF. They know their time entering sales wins is well spent as this valuable information is available for their current and future peers to learn from in the library, not lost in individual email threads.

Fortinet has also found many additional uses for this valuable content. The investor relations team now relies on this information to help prepare for earnings calls. The sales enablement team is mining and incorporating this content into sales training programs. Trish's team uses these wins to identify and qualify potential customer references for prospect phone calls, client lists and RFP requests. Sales wins have also added to the pipeline of customers to recruit into the reference program and discuss future public reference content such as case studies, press releases and blogs.

2018 Sherpa Awards
Top Game Changer

Reference Rock Star Recognition Program Transforms the Value of ForeScout's Customer Reference Program

ForeScout provides network security solutions and services based on a groundbreaking agentless approach. Although the two-person ForeScout Customer Reference Team encouraged salespeople to cultivate customer references, new references trickled in at an average of 1-3 nominations per month.

ForeScout®

To increase the customer reference database, the Customer Reference Team instituted the Reference Rock Star Recognition program. The program, which rolled out in December 2017, honors one reference customer each month who has gone above and beyond to advocate for ForeScout. Each customer honoree must first be nominated via the RO Innovation database, and if chosen, receives a custom award and is recognized in multiple social media platforms.

The Reference Rock Star Recognition program has dramatically and positively impacted the behavior of customers, account reps, and the customer reference team, while creating measurable outcomes that benefit the business. As a result, it has transformed the way ForeScout upper management views the customer reference function and increased its nominations at an average of 10 nominations per month.

Record Social Media Engagement Rates

Since implementing the campaign, ForeScout has experienced its highest social engagement metrics to date. Comments, likes, shares, clicks, and retweets have soared compared to previous levels. For example, a single Facebook post about Nick Duda of Hubspot winning the Reference Rock Star Award which included his testimonial quote received 36 comments and shares.

A Few Impressive Results:

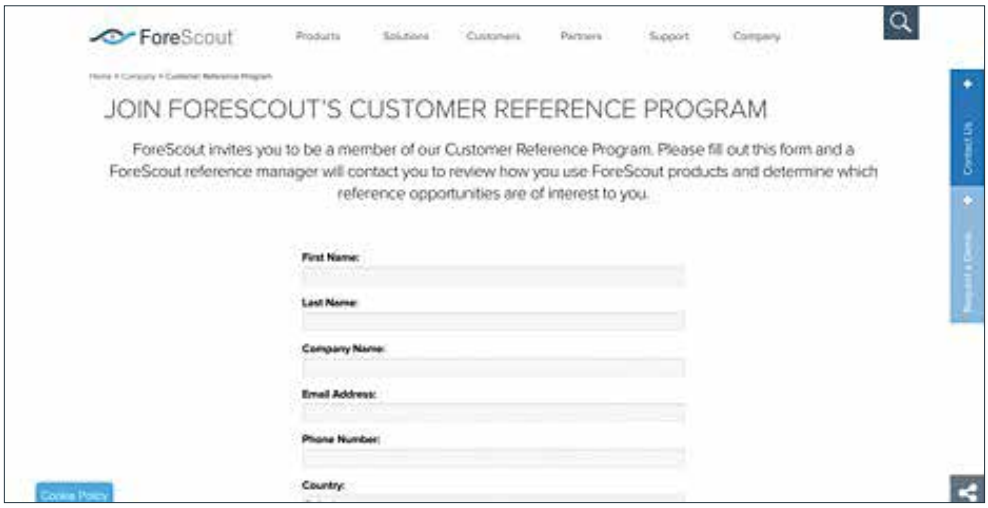
- Twitter impressions skyrocketed 1340%
- Facebook impressions rose 641%
- ForeScout CEO Mike DeCesare's LinkedIn posts average more than 20,000 views: an increase of 300%
- Total impressions across channels jumped from below 20,000 to 91,500+ for a single Reference Rock Star, and total engagements are up to 6,670

Impact to the Business

Perhaps, in part, because of the increased attention of their peers through social media, ForeScout's customers are more interested than ever in participating in reference activities so that they can become the next Reference Rock Star. ForeScout has seen a major increase in the willingness of customers to participate in multiple reference activities like case studies, peer insight reviews, videos, analyst interviews, media interviews, technical advisory board, peer-to-peer calls, and so on to have a chance at the award.

Customers Are Self-Nominating as References

For the first time since the creation of the ForeScout Customer Reference Program, customers are coming to ForeScout offering to become references. The campaign's call to action, which is embedded in every post, directs customers to a landing page with a nomination form which makes self-nomination quick and easy.



RO Innovation User Adoption Rates Are Up

In addition, because nomination of customers is done through the RO Innovation platform, the Reference Rock Star Recognition program has increased user adoption of this tool tremendously. Once inside the tool, account reps are seeing its full value and potential to help them in the sales process. Sales reps have begun to use RO Innovation much more frequently for customer search queries and to gather valuable customer data.

Reference Team Has More Time for Strategy Sessions

In addition to helping the reps be more effective, their increased use of RO Innovation has freed up ForeScout's Customer Reference Team to spend less time recruiting and pushing the reps to use the tool and more time on strategic projects.

Increased Customer Centricity Company-Wide

As an unexpected bonus, the Reference Rock Star Recognition program has also increased employee engagement. ForeScout employees love this program. It's not just the customer reference team recognizing our Reference Rock Stars. From the CEO and CIO to others in the C-suite, support account managers, and back office staff, the entire company has rallied around the award winners and become more focused on customers in general. It's no wonder leadership values the customer reference function more than ever.

Bottom Line: Honoring Customers Pays Off Big Time

In summary, the ForeScout Reference Rock Star Recognition Program is an innovative way to publicly recognize outstanding reference customers in a fun and creative way that makes them feel truly honored. That in itself is a great outcome, but, more than that, the program has stimulated customer engagement through social media channels, dramatically increased momentum in the customer reference program, and kick-started real growth in the customer reference base.

We Asked Field Leaders

How Has the RO Innovation Platform Helped Your Team?

And here are some of their responses...

"Having a dedicated technology solution really allows us to focus on the actual reference program. I can rely on the RO Innovation team to assist me with the technology and I can work on the references. Since I am the only reference manager, that is where my focus really needs to be. RO Innovation really gives me the time to focus on what's important to our business."

Tricia Sale
Sr. Manager, Client Reference Program
Blackboard

"It is wonderful to have one place that holds all our reference information, and it is easy to access and find the information that we need within a few minutes, rather than hours! It helps my team save valuable time by having one system with all the information we need, and it greatly enables our program overall."

Becca Phelps
Product Marketing Manager
8x8

"RO Innovation has been instrumental in developing our reference management program and providing a platform to deliver references, case studies, and general content to the sales team. The platform capabilities are flexible, yet tend to mold your process for the better. This is the second time/second company I have worked together with the team."

Josh Epstein
Chief Marketing Officer
kaminario.

"It helps me keep track of our advocates and match them to requests that are a good fit for them. It also allows me to protect them from overuse and recognize them for their contributions. We've grown our advocacy program a great deal over the last 3 years and I can't even imagine trying to do what we do out of a spreadsheet! Now my information is very organized and it's pretty easy for me to pull the information I need out of it. The RO team is very responsive and easy to work with."

Sherry Arnold
Customer Advocacy Manager
workfront

"RO Innovation has allowed us to bring our reference program to the next level. Prior to RO, we had no standard process and no way to measure exactly who were completing references for us and how often. With RO, we're able to put parameters around our reference usage and ensure we're meeting the needs of our prospects, customer references and internal teams. The RO team has been great to work with as well!"

Jen Molitor
Customer Success Lifecycle Operations Manager
CODE42

Christy DeBernardi
Product Manager
upland

Product Spotlight

What's New?

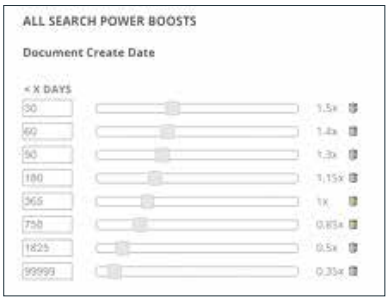
In 2018, RO Innovation rolled out a few new features. Here's a bit about them and why they might be beneficial for you to use.

You spoke, we listened! In 2018 the RO Innovation user experience saw some major updates to give it a more modern look and a more pleasing experience. Here are a few of the benefits of RUX:

- Responsive for any device that a sales or marketing user might be using (i.e. laptop, phone, tablet)
- Easy to navigate and looks as good on a PC/MAC as it does on a tablet, iPhone or other device.
- Topics and Workflows configurable and intuitive to match your sales methodology
- User controlled favorites and saved searches at their fingertips
- Easy insight into ALL of a user's Nominations, Request Statuses, Sales WINS statues, without having to run a separate report/looking at each Opportunity (for Requests, Spotlights, etc.), each Contact (for Nominations) individually.
- Intuitive interface similar to other SaaS based or web applications to which they are accustomed

Relevant Search Engine

Your users are accustomed to and expect instant, relevant search results. Think of Relevant Search as rocket boosters for your RO Innovation search engine. It adds extra "oomph" to your company's existing data based on your preferences, to return the results your users want the most. Relevant Search leverages search "boosters" that fine-tune your platform's search results to provide a better, more relevant experience for your users. The capabilities added behind the scenes of your search engine ensure the most relevant customers and content assets are always pushed to the top of the results page. That means users spend less time and fewer clicks sifting through results to find the exact one they need.



Reference Request Workflows

Every company has a slightly different way of structuring their customer reference program.
There need to be variance and options for how customer reference requests get approved. RO Innovation added increased flexibility to configure reference request approval processes based on the way your organization is structured. This feature now allows for each reference activity type to be configured independently so distinct workflows for different types of requests can co-exist in an RO Platform. Talk with your Upland RO Innovation CSM to learn more about the four types of Reference Request Approval Workflows now available within the RO Platform, and which one is right for you.

Product Spotlight

What's Ahead?

Have you ever wondered where we get new feature and product ideas?

It's a beautiful mix of your direct feedback to our product team, assessment of the future direction of the industry we serve, and the trickle-up information we pull from the customer success, support, and implementation teams who work with you daily and have a solid grasp on your business challenges. Stir that in with a strong dose of product innovation and technology enhancements and the output is a sales-impacting, killer-reference-building mumbo jumbo of a product. We love it because it comes directly from you and all the different ways you influence us. Interested in learning more or playing a bigger role? Our customer advisory board is the group that we feed these ideas to and brainstorm with so we can nail down our product roadmap. We consider our Customer Advisory Board the kings (and queens) of the RO playground.

If you'd like to be considered, email us at roinnovation@uplandsoftware.com.

Upland Analytics

RO Innovation dashboards and reports are about to get a whole lot better! Upland Analytics will be integrated with RO Innovation to deliver new reporting capabilities which will provide you with more actionable business intelligence and predictive analytics on KPIs that matter to your reference program most – like usage.

Upland One User Experience

RO Innovation is getting a mini facelift to match the look and feel of the Upland One suite of solutions. You'll notice a new color scheme, banners and navigation, among other updates to make your user experience consistent with other Upland Software solutions.

upland RO Innovation

Succeeding with Upland RO Innovation

"Since implementing RO Innovation, we've experienced a 96% increase in customer reference contacts in our program, and 65% more accounts."

Eric Andre
Senior Manager, Internal Communications & Customer References

servicemax
From GE Digital

"RO Innovation's Sales Wins feature has been incredibly valuable and successful for our company. User adoption increased 500% in less than 3 months and our content library has quadrupled!"

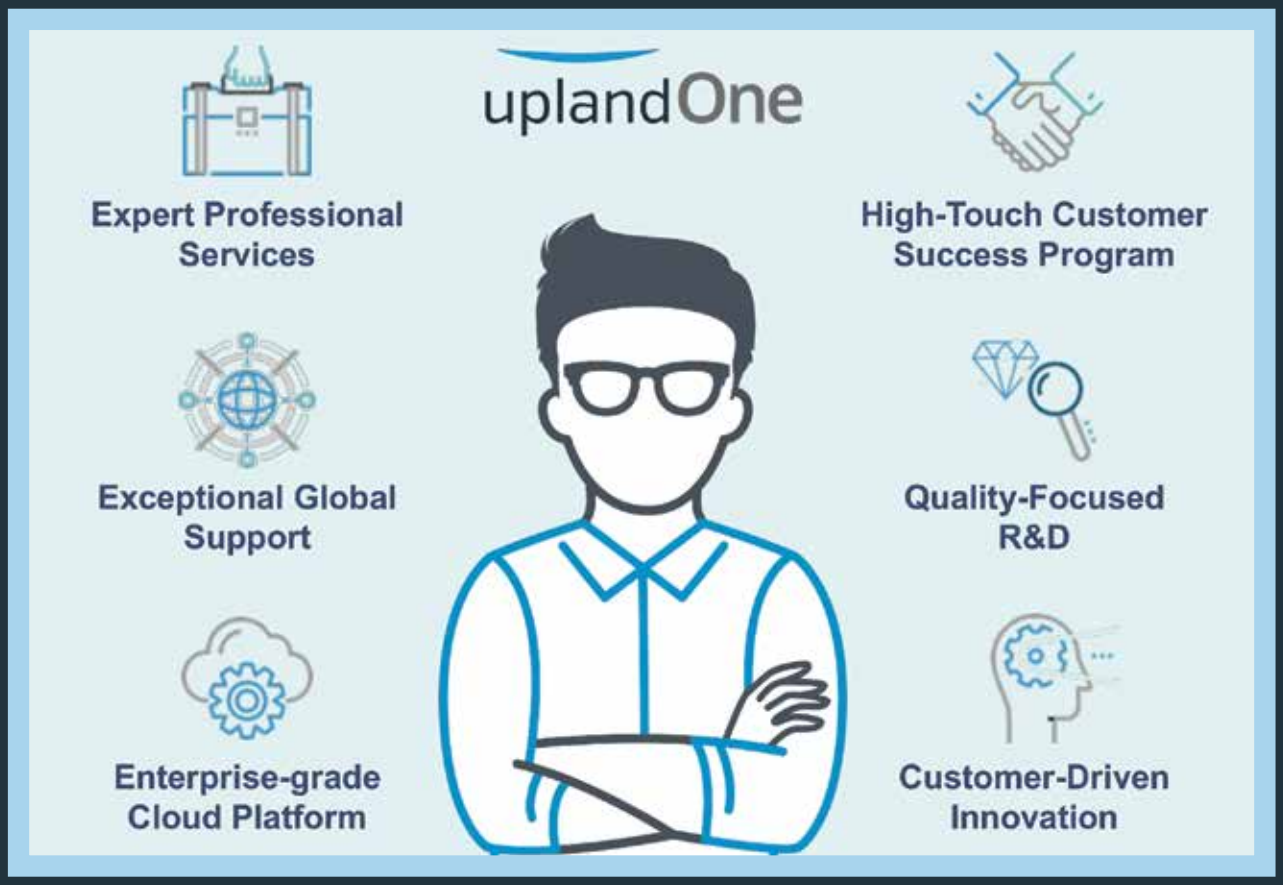
Trish Borrmann
Director of Customer Marketing Programs

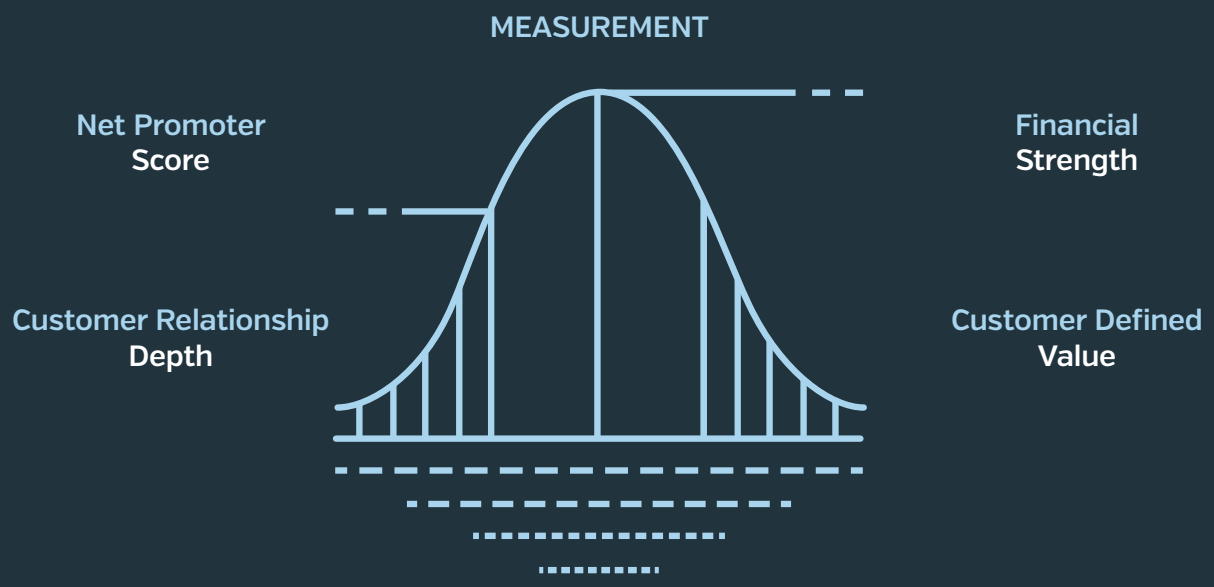
FORTINET

A Closing Letter

Beyond Elevate, Looking to New Horizons (and Successes)

We all know it - a true sales enablement solution is built upon the foundations of customer advocacy. And these days, customer testimonials can enrich the story behind a company in ways we couldn't have conceived of in a pre-Internet era; where both brand advocates - and detractors - can make or break your biz with a few clicks. That's why finding those sincere, enthusiastic brand advocates is such a valuable, critical goal.





RO Innovation has a history of introducing new features and innovating product solutions based directly on the feedback and ideas of our customers. We live it and believe it: it's all about the Voice of the Customer. By joining the Upland Family, we are proudly reaffirming our commitment to the customer by taking on the ideals outlined in our UplandOne platform.

By aligning our UplandOne platform with the RO experience, we're working (almost Sherpa-like, one could say) to guide our own brand advocates toward achieving their goal. From onboarding and training through every interaction with our product, we're right beside you on this journey: providing Customer Success Managers, access to Executive Outreach, a library of resources, ongoing training opportunities, a transparent feedback loop, and so much more. This really is the whole package, and we're excited to get started.

As one of the newer faces on the RO Innovation team, I'm already so sincerely impressed by the success stories I've heard. Truly hope to see you at Elevate, so we can chat about how to make 2019 your best year yet. Let's shout it from the mountaintops!

Warmly,

Karen Meyer
Senior Director of Customer Success,
Workflow Automation, Upland Software

upland

Thank you for joining us at the premier customer advocacy industry event!

RISE HIGHER | 2018

SAN JOSE, CALIFORNIA NOVEMBER 14 - 15

uplandsoftware.com/roinnovation/elevate-customer-summit-2018/

Don't Miss a Moment of the Important Stuff

Stay up to date on all upcoming news, events, announcements, and product developments by following us on Linkedin and Twitter

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