

A Trusted Customer Reference Resource



Customer-focused enterprise cloud data management company streamlines and strategically enhances reference-based sales efforts across multiple global teams.



Informatica's marketing team had focused on customer advocacy as a sales asset for many years but struggled with challenges that many larger organizations face: staff wasted precious time searching through stale, outdated content, and promotion of the customer reference program company-wide had stalled; in fact, many weren't even aware the program existed. Within the marketing team, existing customer references were simply unmanageable.

"It was deployed shelfware. Information was accessible, but the data was not being managed or governed effectively and was not trusted," said Rob Karel, VP of Strategic Marketing Initiatives. "Our Excel spreadsheets were more trusted than our reference management system."

When Informatica encountered a leadership change, a cultural shift within the team grew, and harnessing current and reliable customer advocates as critical and valued assets became a priority. The renewed focus on taking a strategic look at customer success resulted in more hires for the marketing team and created the opportunity to find a more comprehensive solution to reap the full benefits of a customer advocacy initiative.

The Challenge

- **Create** one reliable, central resource for information that can be accessed easily across the company
- **Find** an intuitive solution that can be managed and updated rapidly to ensure accuracy and impact
- **Increase** usage of customer references to achieve more sales wins
- **Protect** key customer advocates from falling victim to overuse or "fatigue" by instituting an interaction tracking system
- **Find** a solution with a high level of support to get key team members on board and fluent in new processes

Informatica is the world's leader in Enterprise Cloud Data Management, providing customers with foresight to become more agile, realize new growth opportunities, and create new inventions.

Informatica uses RO Innovation to enable staff to locate current, relevant, and impactful customer references and leverage those customer experiences to enhance sales efforts.

"We want to tell the Informatica story through the eyes and experiences of our customers. RO Innovation has allowed us to do that. It's a tremendous facilitator for creating a single source of truth, helping us search and find information quickly, and to fulfilling requests and onboarding advocates."

– **Michelle Gardner**, Sr. Director of Customer Advocacy, Informatica

Approach

Several key changes related to the RO Innovation adoption process were rolled out quickly on a region-by-region basis. “The executive team agreed that to be recognized as a strategic partner for our customers, Informatica needed to lead with our customer stories,” said Rob Karel, VP of Strategic Marketing Initiatives. “It’s all about trust and keeping customers successful.” The adoption of a cloud-based solution immediately increased visibility across the company and allowed the marketing, sales, and support teams to access reference information in real-time, which helped support this customer focus.

Another change began at the sales level. Historically, many salespeople who were skeptical of the old reference system tended to hoard their back pocket references, which made tracking nearly impossible. By harnessing RO Innovation to create a single point of storage and access, Informatica quickly streamlined the process, improving salespeople’s trust in the system by greatly decreasing time-to-fulfillment and increasing fulfillment rate.

Finally, RO Innovation’s hands-on platform training and its integration with Salesforce further drove adoption for the sales team. “Usability was key. You can identify the best references or submit a request from Salesforce in just a few clicks,” said Michelle Gardner, Sr. Director of Customer Advocacy. After implementation and training, Informatica’s advocacy team has maintained a 95% sales reference fulfillment rate, enabled by RO Innovation.

Results

Informatica has always been a customer-driven company, and the adoption of the RO Innovation solution helped instill better processes and

governance to promote its customers’ success. Now Informatica has a reliable customer reference system in place that can track and discover which customer references are ideal to use at key points in the buyers’ journey – or which key references need time to “breathe” so that they don’t become fatigued.

“RO Innovation enabled us to put in guard rails of when to use key references, which has been a game-changer for us,” says Michelle Gardner. “We have real data points to guide our use, which better ensures we bring customer references in at the right point in the sales cycle and don’t overuse their stories.” With the help of RO Innovation, over the past year, the Informatica Customer Advocacy team has been able to deliver:

- **16%** year-over-year increase in active sales advocates
- **60%** year-over-year increase in customer success stories
- **95%** sales reference fulfillment rate

What’s Next

After implementing the RO Innovation solution, the sales team has been carefully tracking successes achieved, and Informatica’s Customer Advocacy team has already launched their 2.0 Release, which incorporates more features to make the solution even stronger and will be enhanced by the benefits of Upland Analytics to track and measure success and refine strategy. As the Informatica team’s needs grow and change, RO Innovation’s solution is poised to help them achieve more by promoting the successes of their key customers.



About Upland Software

Upland Software (Nasdaq: UPLD) is a leader in cloud-based enterprise work management software. Upland provides seven 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.