Case Study

Sales Customer Reference Program at Sage helps close deals faster with Upland RO Innovation
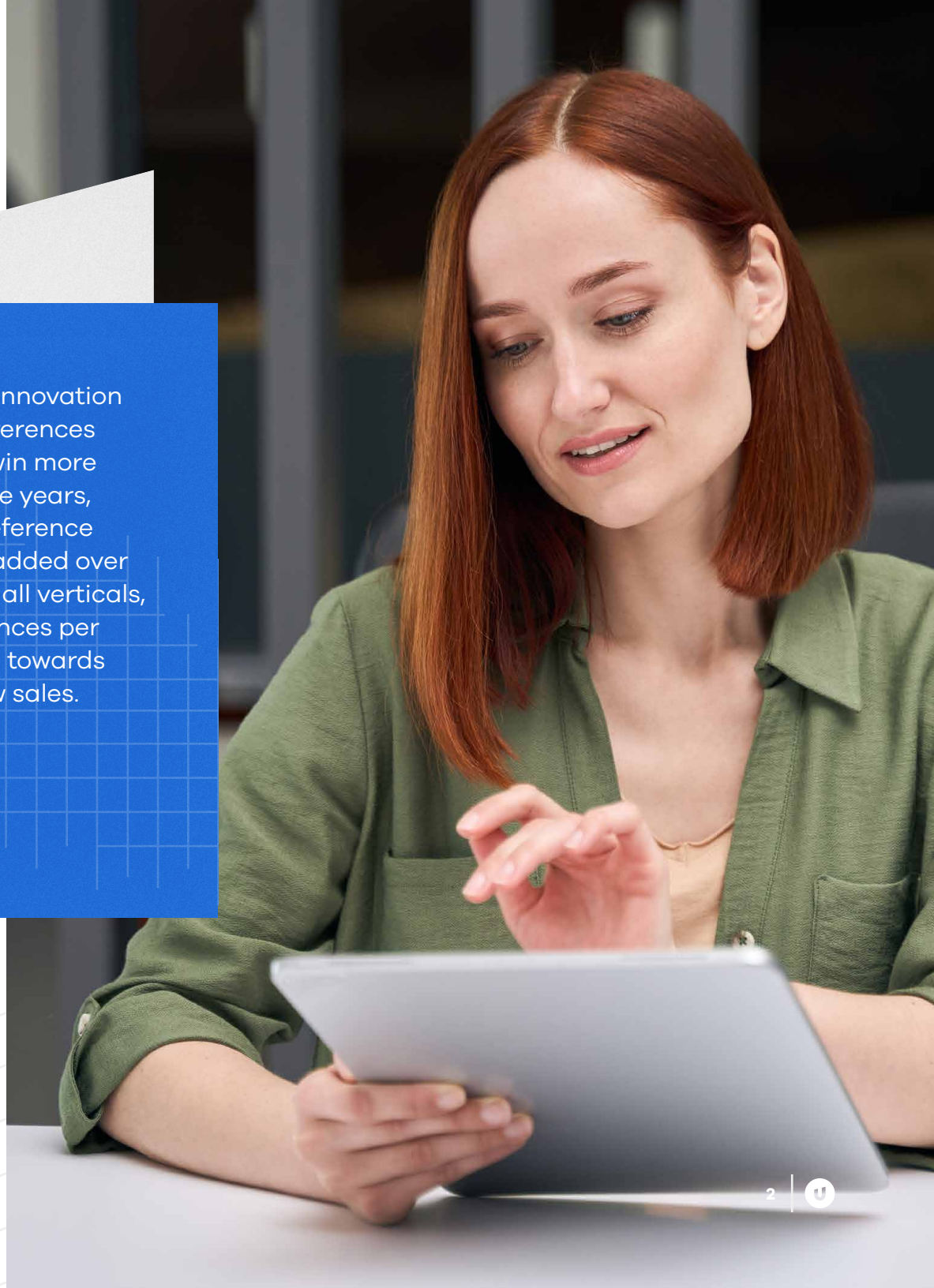
Sage uses Upland RO Innovation to deliver customer references so its sales team can win more deals, faster. Over three years, the Sales Customer Reference Program at Sage has added over 800 references across all verticals, delivers over 30 references per month, and is trending towards influencing 30% of new sales.

How do you stand out in competitive sales opportunities?

Sales reps at Sage rely on customer references to win deals.

However, as the sales team grew, it also outgrew its existing in-house customer reference management tool. With many lines of business, products, and services, the sales team needed a dedicated system that could help find specific references, provide access to sales and marketing content, and integrate with existing CRM and sales enablement systems.

Creating a competitive advantage for sales reps with RO Innovation

With support from Upland RO Innovation, the Sales Customer Reference Program leaders at Sage set out to make life easier for sales reps to connect prospects with customer references. There were two goals. The first was to create a customer reference program that could scale and support the long-term success of the sales team. The second, make program participation an enjoyable experience for customers.

"Since we have built out this program, we now have a competitive advantage in selling cycles."

– Eric Kent
SVP North American Sales

With RO Innovation, Sage sales reps can deliver references with impact

Building a best-in-class customer reference program

Led by Kara Manfredi, Senior Manager Customer References, and Simon Le-Fevre, Global Project Management and Change Manager, the strategy and action plan was set in partnership with sales, account owners, and other stakeholders.

A self-service system and program support through RO Innovation was implemented within the Sage sales organization. Approved references were organized based on specific criteria, such as use case, industry, region, or experience (e.g. decision maker, end user, implementation lead, customer support, etc.) Thresholds are set to prevent using the same references, as well. References were also made available

by activity type, such as phone calls, and content (e.g. case studies, quotes, and fast facts).

For customers, templated briefing documents, pre- and post-reference touchpoints, surveys, and rewarded recognition has helped to foster a deeply engaged community of supporters.

Bottom line results speak volumes

The Sales Customer Reference Program at Sage has achieved remarkable success. It's estimated that the program has helped capture more than double the monthly recurring revenue figures in 2024 compared to 2023.

The implementation of RO Innovation has also helped streamline operations and

improved productivity for sellers. With more automation and reliable data, customer-facing teams at Sage can spend more time building and nurturing relationships with their customers.

What's next for Sage?

The next step is to expand Sage's Sales Customer Reference Program across more sales regions and into other departments, like channel partners and the RFP response team.

With support from Upland RO Innovation, Sage's Sales Customer Reference Program has evolved into a pivotal component of the sales team's strategy, contributing substantially to its bottom line, and enhancing customer engagement and satisfaction at the same time.

Results for Sage

30%
trending influence
of Sales Customer Reference Program at Sage

800+
customer references
across all verticals for sales

85%
reduction
in overall time spent for sales reps to find and secure a customer reference for a prospect

Upland RO Innovation is customer reference management software for companies that win. Automatically serve up the best customer references to close deals, faster.

upland
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