

reference edgeSM

PRODUCT OVERVIEW

The only 100% Salesforce® native app for customer advocate management. ReferenceEdge centralizes advocate data and content in Salesforce, provides a consistent UI (Classic or Lightning), automates time-consuming processes, and leverages the security and scalability of the Salesforce platform. We make it easy to find advocates and influence opportunities.

▶ **MANAGE & SHARE CUSTOMER CONTENT**

Surface relevant customer content on opportunity pages, share through microsites, track engagement and revenue influenced.

▶ **SEARCH**

Relevant advocate accounts surfaced on opportunity pages. Use filters and keywords together for precise results.



▶ **REQUEST AUTOMATION**

Automate the reference request workflow for peer-to-peer or program team fulfillment.

▶ **PREVENT ADVOCATE OVERUSE**

Set limits on and track how often advocates are used to prevent advocate fatigue.

▶ **PROGRAM MEMBERSHIP MANAGEMENT**

Manage, in Salesforce, who is referenceable, for what, how often and for what activities.

▶ **PROGRAM METRICS**

Track real-time program performance, including revenue influenced, through pre-built reports and dashboards.

▶ **SECURE & SCALABLE**

Leverage these core attributes of the Salesforce platform. ReferenceEdge runs exclusively in your Salesforce environment.



▶ **PROFILE UPDATE MINDER**

Automate advocate data updates through periodic reviews by account relationship owners.

▶ **REFERENCE LEAD FINDER**

Maintain a full pipeline of qualified customer advocate program candidates.

▶ **ADVOCATE REWARDS**

Issue and redeem reward points upon completion of any advocate activity.

▶ **GAMIFICATION**

Make using ReferenceEdge fun and rewarding for end-users while reinforcing desired behaviors.

▶ **TECHNOLOGY INTEGRATION**

Integrate with related technologies with Salesforce processes, workflows and triggers. Pre-built integrations available are for Influxive, Gainsight™, and TechValidate™.

▶ **MOBILE**

Give your road warriors access to ReferenceEdge natively through Salesforce1 Mobile.



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