

reference edgeSM

PRODUCT OVERVIEW

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

▶ **MANAGE & SHARE CUSTOMER CONTENT**

Surface relevant customer content from a Salesforce opportunity or Slack, share through microsites, and track engagement clicks and revenue influenced.

▶ **SEARCH**

Relevant advocate accounts are surfaced on Salesforce opportunity pages or Slack. Use filters and keywords together for opportunity-relevant results.



▶ **REQUEST AUTOMATION**

Automate the advocate request workflow between peers, or with program manager assistance, and keep track of request history.

▶ **PREVENT ADVOCATE OVERUSE**

Set limits on and track how often each advocate is used, and how, to prevent advocate fatigue.

▶ **PROGRAM MEMBERSHIP MANAGEMENT**

Manage advocate status and individual profiles that include referenceable products, approved activities, use limits, and more.

▶ **PROGRAM METRICS**

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



▶ **GAMIFICATION**

Reward and recognize customer advocate activities. Gamify your gratitude and strengthen relationships. Also accelerate ReferenceEdge user adoption by rewarding desired behaviors, an important lever in change management.

▶ **SECURE & SCALABLE**

Leverage the core security attributes of the Salesforce platform for GDPR peace-of-mind. ReferenceEdge and related data reside exclusively in your Salesforce environment.



▶ **CALENDAR COORDINATION**

Automate the time-consuming, yet time-sensitive process of connecting buyers with approved advocates.

▶ **PROFILE UPDATE MINDER**

Automate advocate data updates through periodic review reminder notifications sent to account relationship owners.

▶ **REFERENCE LEAD FINDER**

Maintain a full pipeline of qualified customer advocate candidates. ReferenceEdge monitors closed-won opportunities so you don't have to.



▶ **GROUP EVENTS**

Whether in-person or virtual, seamlessly manage one-to-many events involving advocate accounts and buyers, and track event influenced revenue.



▶ **TECHNOLOGY INTEGRATION**

Pre-built integrations are available for Slack, Gainsight, UserEvidence and TechValidate by Survey Monkey. Leverage Salesforce flows and triggers for unique business process automation needs.

point of reference®