upland RO Innovation

Data Sheet

Complete Customer Referral Project Checklist

30-Day Checklist: Introductory Tasks

- [ ] Secure a C-Level sponsor (not just executive level, must be C-level) to support your efforts. Ensure that you are able to meet with this sponsor regularly to report on the progress of program and to highlight champion users.
  - [ ] Recommended: CEO, CMO and/or CSO
- [ ] Work to identify mentor/stakeholder/champion/buddy in marketing, sales & customer success
- [ ] Become familiar with internal operating policies & procedures
- [ ] Access & understand the sales, marketing & customer success organizational charts
- [ ] Define a mission statement & high level goals that you can share with stakeholders in the organization
- [ ] Understand technologies used for sales, marketing & customer success
  - [ ] Identify where assets (internal and external) are being stored
  - [ ] Gain access to CRM/SFA application and get access to customer profiles
  - [ ] Intranets, Sales portal, Central drives, etc.
- [ ] Sit in on a customer demo
- [ ] What is the reference program?
  - [ ] Define it – mission statement, goals, purpose, who owns it
  - [ ] Define value for internal stakeholders/departments
- [ ] Familiarize yourself with current reference process
  - [ ] Is there an existing reference database (spreadsheet, crm, etc.)?
  - [ ] If not, evaluate customer reference vendors
- [ ] Start building your bucket of referenceable customers
  - [ ] How is the company currently getting leads for referenceable customers?
- [ ] Where else could referenceable customers be coming from?
  - [ ] Surveys
  - [ ] Beta programs
  - [ ] Net Promotor Scores
  - [ ] Advisory boards

- [ ] Sales contracts
- [ ] User conference
- [ ] Quarterly sales goals
- [ ] Awards i.e. “best use of ____”
- [ ] Marketing customer lists
- [ ] Advocacy programs
- [ ] Sales wins
- [ ] Event registration forms
- [ ] User groups
- [ ] Website
- [ ] Social media
- [ ] Sales contests, etc.
- [ ] Work with everyone within your organization that interacts with your customers to help identify references

- [ ] Is there a current request process/workflow? Where are existing silos of information/databases? (Note: this will also drive program budget for technology tools)
    - [ ] Intranet
    - [ ] People’s dashboards
    - [ ] Email
    - [ ] CRM/SFA, Customer groups/advisory boards/online communities/beta groups
- [ ] Discovery sessions: Schedule meetings with correct contacts in sales/sales ops, marketing/marketing ops, PR, customer success, IT, partner program, channel sales, professional services, account managers, support, legal, finance, etc.
    - [ ] Get familiar with challenges they face, how the program would touch them/aid in their daily jobs, how program impacts their department
    - [ ] Familiarize yourself with typical asks, what’s ahead, new developments, etc.
    - [ ] Evaluate the way you are currently providing references and deliverables to the sales organization
- [ ] Understand the GTM strategy & marketing calendar for the year (at a high level), as well as the overarching marketing messaging

60-Day Checklist: Discovery

- [ ] Create Internal Advisory Council (to get input, background, discovery, mentorship, etc.)
  - [ ] Someone from sales & sales ops
  - [ ] Someone from marketing
  - [ ] Someone from customer success
  - [ ] Someone from IT
  - [ ] Someone from customer support/account teams
  - [ ] Someone from finance
  - [ ] Someone from legal
  - [ ] Someone from partner/channel
  - [ ] Product Marketing
- [ ] Define benefits for sales, marketing, etc. (all stakeholder organizations)
  - [ ] Answer “What’s in it for me?”
  - [ ] Show how your program touches and supports each department
- [ ] Define what metrics are going to be important to provide to executives
  - [ ] What type of reporting is important? Can you pull from a bucket of canned reports? (i.e. number of new recruits, usage, customer burnout risk, deals impacted, revenue tied, verticals, product references, etc.)
  - [ ] Drill down metrics on sales success & utilization
    - [ ] Can you prove with early adopters that when they use your reference program that they close deals/increase cross-sell/upsell opportunities, etc.?
    - [ ] Can you prove that it’s easy to use and not a heavy burden for them?
  - [ ] Can you blend reports with the CRM, Marketing Automation systems, etc. to overlap reports and show success across multiple touch points in the sales and marketing continuum?
- [ ] Secure budget for a program. Consider line items for:
  - [ ] Technology tool (i.e. Upland RO Innovation, Boulder Logic, etc.)
  - [ ] Building new assets
  - [ ] Rewards program
  - [ ] Staffing (i.e. need 2 additional headcount, 1/3 FTE from sales ops, etc.)
  - [ ] Mapping existing customer data to industry, product, geography, reference activity participation, etc.
  - [ ] Mapping existing content assets (case studies, videos, webcasts, etc.)
  - [ ] Identifying gaps and anything needed to fill them (customers + content/asset)

90-Day Checklist: Tactics & Strategy

- ☐ Evaluate if a customer reference management technology tool is needed to support database and workflows, best practices, pipeline, etc. or if you will be using something else as a centralized database
  - ☐ Define business challenges solved/overcome with having a tool
  - ☐ Demo vendors; get price quotes & implementation timeframes
  - ☐ Meet with IT, etc. on requirements needed for tools/approval processes
  - ☐ Have vendor assist with your "internal selling" efforts and value justification (ask them to provide TCO calculators, value propositions and talking points, customer stories/case studies, tribal knowledge, etc.)
  - ☐ Consider how you want partners to have access to references and assets (tailored experience for them, blended branding, etc.)
- ☐ Finalize full buckets of activities you'd be asking references to participate in
  - ☐ Align with budget availability/goals
- ☐ Check to see what's in existing contracts (approval/utilization of logos, etc.)
- ☐ Formalize reference request & nominations process to sales and marketing (you may want to expand to entire company- not only sales and marketing)
- ☐ Have executive sponsor send message to all stakeholders/users
  - ☐ Message you want: Customer is owned by everybody...not just one person/department
- ☐ Plan and start developing branding & communication of program (name, logo, etc.) & program materials for internal and external use
  - ☐ Example: How you make the ask/present program
  - ☐ Incentives? (Internal, external)
- ☐ Create script for defining reference customer recruitment
  - ☐ Generic question list template (should mirror what you're tracking/collecting in your tool/database)
  - ☐ Specific questions based on marketing messaging, reference activity, industry vertical, reference lead source, etc.

120-Day Checklist: Launch & Execution

- [ ] Select Technology Tool (if needed)
- [ ] Formally launch & announce the reference program publicly:
  - [ ] Landing page on website
  - [ ] Social media
  - [ ] Email announcements
  - [ ] Internal outlets (brown bag launches, etc.)
  - [ ] Sales & marketing meetings
  - [ ] Events
- [ ] Training internal employees & user adoption strategies
  - [ ] How to use the program
  - [ ] Evangelize program internally & track program usage/adoption
  - [ ] Get on calendar for sales training, new employee orientation, etc.
  - [ ] Onboard vendors who will be developing content for the program
- [ ] Recruit Customers
  - [ ] Qualify customers to participate in program (determine good/bad fit criteria)
  - [ ] Get consent from “low hanging fruit” customers (see 30 day checklist) to participate in program
  - [ ] Create updated script/request form
  - [ ] Articulate what’s in it for the customers? (Value prop) Explain any incentives for participating in your program if you have any.
    - [ ] Seek approval from appropriate contacts on incentive options if applicable (example: user conference passes)
- [ ] Launch user group for your customer reference program
  - [ ] Create Salesforce.com Chatter customer group to get the word out. Yammer?
  - [ ] Get customer on advisory board to evaluate what activities are appropriate, how you can help them through the program, vet what they’d find beneficial, etc.
- [ ] Recognition plan for customers participating in program
- [ ] Market your program: Find ways to increase visibility/stickiness of your program within the company. If you can’t get people to adopt and use your program, it will die...so do this early and often!!
- [ ] Capture first metrics of the program

For more information on RO Innovation, visit uplandsoftware.com/roinnovation

About Upland Software

Upland Software (Nasdaq: UPLD) is a leading provider of cloud-based Enterprise Work Management software. Our family of applications enables users to manage their projects, professional workforce and IT investments; automate document-intensive business processes; and effectively engage with their customers, prospects and community via the web and mobile technologies. With more than 4,000 customers and over 450,000 users around the world, Upland Software solutions help customers run their operations smoothly, adapt to change quickly, and achieve better results every day. To learn more, visit www.uplandsoftware.com.