



Informatica

**Case Study**

**Informatica  
increases  
its reference  
fulfillment rate  
to 95% with  
RO Innovation.**



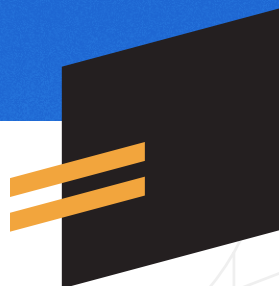
**RO Innovation**

**INDUSTRY**  
**Computer Software**

**COMPANY**  
**Informatica**  
Redwood City, CA  
[informatica.com](http://informatica.com)

Informatica empowers the globe's most progressive companies to realize data-driven digital transformations that change the world. Over the last 25 years, Informatica has helped more than 9,000 customers unleash the power of data, including 85 companies in the Fortune 100.

**Informatica** trusts Upland Software's RO Innovation product to provide its sales team with approved customer references on demand. With RO Innovation, Informatica grew its library of customer success stories by 60% in one year and now maintains a 95% reference fulfillment rate. RO Innovation's automatic tracking also saves Informatica from overusing its best references.



# How do you relaunch a customer reference program and drive participation?

## Informatica needed to rebuild confidence in its customer reference program.

From the beginning, Informatica depended on customer advocacy to accelerate deals and build relationships with its prospects and customers. Somewhere along the way, the promotion and adoption of its formal customer reference program stalled. Many newer employees didn't even know the program existed.

"We had a legacy reference management system, but it was deployed shelfware," said Rob Karel, VP of Strategic Marketing Initiatives. "Information was not being managed effectively, and the team actually trusted its outdated reference spreadsheets more."

## Informatica decided to invest in new reference management software.

When Informatica's leadership changed, the company redefined its priorities. Informatica had always put its customers first but decided that relaunching its formal reference program was now a top strategic initiative. Marketing took on the challenge of finding new software to support the relaunch.

After a thorough search, Informatica selected RO Innovation. The team was impressed with how RO Innovation provided a single, go-to place for nominating, requesting, and finding references. RO Innovation was also intuitive and easy to navigate, so the sales team could get started fast with practically no training.

*"We want to tell Informatica's story through the experiences of our customers. RO Innovation has allowed us to do that. It's tremendous for creating a single source of truth, fulfilling reference requests, and onboarding customer advocates."*

**– Michelle Gardner**

Sr. Director of Customer Advocacy  
Informatica



# With RO Innovation, Informatica dramatically increased reference fulfillment.

## RO Innovation's built-in safeguards and Salesforce integration won over Informatica's sales team.

Informatica's sales team was hesitant to nominate references to the company's legacy program because they worried other reps would misuse their contacts. Ironically, because sales didn't share references, they often had to reuse their own trusted references repeatedly, causing burn-out.

"RO Innovation put in guard rails for our reference program," said Michelle Gardner, Sr. Director of Customer Advocacy. "Now we have data to guide us, so we bring in references at the right point in the sales cycle and never overuse their stories." These safeguards went a long way toward

regaining the sales team's trust in the relaunched reference program.

RO Innovation's Salesforce integration further won over the sales team. "You can identify the best references and submit requests from Salesforce in just a few clicks," said Gardner. "Simplicity and convenience were key to getting sales to contribute."

## Informatica uses RO Innovation's analytics to strengthen and refine its customer reference program.

One year after relaunching its customer reference program with RO Innovation, Informatica saw a 16% increase in customer advocates and a 60% increase in customer success stories.

"The executive team agreed that to be a true strategic partner for our customers, we needed to lead with our customer stories," said Karel. "RO Innovation gave us the means to do just that as the enabler of our new customer reference program."

Today, Informatica has an average annual reference fulfillment rate of more than 95% and has its eyes on even higher levels of success. The company uses RO Innovation's included analytics dashboards to make data-driven decisions to drive continuous improvement. Informatica looks forward to growing with its customers and actively celebrating their successes along the way.

## Results for UPMC Insurance Services Division

**+16%**  
customer advocates  
in the first year of  
using RO Innovation

**+60%**  
success stories  
year-over-year after  
choosing RO Innovation

**95%**  
fulfillment rate  
for reference requests  
with RO Innovation

**Upland RO Innovation** is the backbone of the world's most successful customer reference programs. As the go-to location for storing, requesting, and suggesting reference contacts and content, RO Innovation helps sales and marketing teams bring order to their reference programs and grow their banks of customer advocates. Over 225,000 users rely on RO Innovation to strengthen relationships and win more deals faster with targeted customer references.

upland

**RO Innovation**

For more information visit: [uplandsoftware.com/roinnovation](https://uplandsoftware.com/roinnovation)