

Activity		Details	
Opportunity Owner	Jill	Amount	\$440,000
Private	☐	Close Date	3/8/2020
Opportunity Name	United	Stage	Propose
Account Name	United	Probability (%)	60%
Opportunity Record Type	RO Innovation	Type	New Customer
RFP Received	☐	Ready Assets	Customers (3) Assets (2)
Competitor	Brand Excellence Consulting	Quick Plays	What to Send (2) What to Do (2) What to Know (1) What to Say (3)
Next Step	Reference request required		

RO Innovation's Sales Enablement module enhances CRM opportunity records by intelligently adding links to the most relevant customer references, marketing content, and coaching materials. With the Sales Enablement module, teams can capture sales insights, accelerate pipeline, and improve win rates.

Always Know What to Say, Do, and Share

Based on an opportunity's sales stage and details, RO Innovation recommends assets from your content library that are best suited to help close the deal.

Ready Assets - Access the most applicable customer references and marketing content directly from opportunity records, so teams can stop searching for assets and maintain focus on winning deals.

Quick Plays - View the most appropriate sales coaching and guides without leaving your CRM to avoid common pitfalls, recreate past successes, and always take the next step confidently.



Sales Enablement



RO Innovation enabled us to put in guard rails for when to use key references, which has been a game-changer. We have real data points to guide our use, which better ensures we bring customer references in at the right point in the sales cycle and don't overuse their stories."

Michelle Gardner,
Sr. Director Customer Advocacy
Informatica

Capture Sales Insights to Drive Success

The Sales Enablement module helps teams formalize their sales win and loss program to capture insights, identify trends, and share tribal knowledge.

Sales Wins/Losses - As deals close, teams can submit critical information about how and why they won or lost the deals quickly and easily. Sales wins can also help identify future reference customers.

ADD A SALES WIN

SaveSubmitCancel

ACCOUNT

CUSTOMER OVERVIEW

WIN REVENUE

UPLOAD SOLUTION

☒ ☐

☐ Sales Enablement (SE)
☐ Customer Experience Management (CXM)
☐ Document Lifecycle Automation (DLA) & Secure Document Services (SDS)
☐ Enterprise Knowledge Management (EKM)

Powered by CRM Integration

This module leverages an integration with a leading CRM, such as Salesforce or Microsoft Dynamics. RO Innovation's professional services experts will guide organizations' through this simple integration to help them get more value from both RO Innovation and their CRM solution.

More Information

For more information, or a demo of the Sales Enablement module, please contact your RO Innovation Account Representative or Customer Success Manager [CSM].

About Upland Software

Upland Software [Nasdaq: UPLD] is a leader in cloud-based enterprise work management software. Upland provides four enterprise cloud solution suites that enable more than one million users at over 9,000 accounts to win and engage customers, automate business operations, manage projects and IT costs, and share knowledge throughout the enterprise. All of Upland's solutions are backed by a 100 percent customer success commitment and the UplandOne platform, which puts customers at the center of everything we do.