

THE SALESFORCE NATIVE TECHNOLOGY advantage

reference **edge** SM



SINGLE DATA SOURCE

Centralizing advocate data within Salesforce ensures consistent tagging, granular search, and simplified maintenance—making your data more trustworthy. With one real-time source of truth, reporting is accurate and immediate. Use native Salesforce reports and dashboards, or connect Tableau or Power BI. No more spreadsheets!



AUTOMATION & AI

Automation powers scale. Living inside Salesforce means smarter, context-aware workflows for everything from advocate recruiting to request routing, feedback capture, and data hygiene. With Agentforce, users interact using natural language—powerful actions with simple prompts. It's not just easier—it's faster, more accurate, and deeply embedded in your CRM. Program managers have more time for strategy, while automation and AI handle the rest.



FLEXIBILITY

Every customer is different—and with over 20 years of experience, we know where flexibility matters most. ReferenceEdge offers hundreds of configuration options, nearly all of which are under the program manager's control—no need to burden your Salesforce admin. Your assigned account resource is there to guide you, offering best practices to help you make smart, informed choices. And for unique needs, Salesforce Flows provide limitless customization without ReferenceEdge code changes.

SCALABILITY & PERFORMANCE

Native apps automatically inherit Salesforce's performance, uptime, and scalability. Whether you've got 100 users or 100,000, your solution keeps pace without scaling headaches.



A BETTER USER EXPERIENCE

No new logins. No switching tabs. Customer advocacy lives inside Salesforce—right where users already work. From search and requests to advocate insights, it's all embedded in familiar workflows. Real-time data means instant answers, and with access in Slack and Teams, users stay productive wherever they are.



COST & SIMPLICITY

Your company has already made the investment in Salesforce—maximize it. Native apps boost the value of your Salesforce licenses by extending its capabilities without adding new external systems to manage. No extra infrastructure, no hidden integration costs, and no extra logins to remember. Procurement, legal, and IT all breathe easier knowing a native app is Salesforce-trusted.

MOBILE READY

Road warriors can search, request accounts, and share customer content from the Salesforce mobile app. Nothing extra required.



DATA SECURITY

Your data never leaves Salesforce. It's your data—full stop. A native app lives inside your Salesforce org, with zero data flowing to third-party servers. That means no external APIs to secure, no duplicate systems to manage, and no additional vendors to vet. It inherits Salesforce's enterprise-grade security, compliance, encryption, and governance. For companies with strict data policies, this isn't just convenient—it's essential.



ACCESS TO EMERGING TECHNOLOGIES



Native apps tap directly into Salesforce's ever-growing R&D engine, gaining early access to powerful tools like CRMA for predictive insights, Experience Cloud for community engagement, and Agentforce for secure, native GenAI capabilities.

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