

referenceedgeSM

Solution Overview

ReferenceEdge isn't just software—it's the engine behind your advocacy strategy. Built natively on Salesforce, it brings every piece of your advocate and content ecosystem into one seamless experience, so the right stories and voices are always at your fingertips.

With predictive AI and Agentforce generative AI working quietly in the background, you stay ahead of demand, and unlock new ways to influence pipeline and revenue.



Prevent Advocate Overuse

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

Single Source

Centralize all things advocacy. ReferenceEdge makes advocates instantly searchable and deployable.

Purpose-Built Search

Algorithmically matched advocates and content are surfaced on Salesforce opportunities, in Slack or Teams.

Request Automation

Choose white-glove control, peer-to-peer scale, or a mix of both. Streamline approvals and cut fulfillment time.

Calendar Coordination

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

Predict Advocate Demand/Gaps

Use predictive AI powered by CRM Analytics to forecast sales pipeline demand and flag advocate gaps—before it's a fire drill.

Engage Your Membership

Connect, communicate, and crowdsource with your advocate community. Our lightweight community is built on Salesforce Experience Cloud.

Sales Enablement

Relevant customer content suggested right on a Salesforce opportunity. Use Slack or Teams to share through microsites, and track engagement clicks and revenue influenced.

Technology Integrations

Connect to Salesforce Experience Cloud, CRM Analytics, Slack, Microsoft Teams, Marketo, Eloqua, and Gainsight. Use Salesforce Flows for your unique process automations.

Secure & Scalable

Our software inherits the core security attributes of the Salesforce platform it resides exclusively in your Salesforce environment.

Gamification

Gamify your gratitude and strengthen advocate relationships. And, accelerate ReferenceEdge user adoption by rewarding desired end-user behaviors.

Advocate Recruiting

Keep your pipeline flowing with 5 powerful recruiting features. Never run out of advocate candidates.

Detailed Advocate Profiles

Manage advocate status and preferences. No more guessing on referenceable products, approved activities, and past activity.

Keep Data Clean

Automate review reminders so advocate profiles and content stay accurate. We handle the nudges—you focus on bigger priorities.

Program Metrics

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

Group Events

Manage one-to-many events involving advocates and buyers—whether in-person or virtual—seamlessly and track event influenced revenue.