Altify
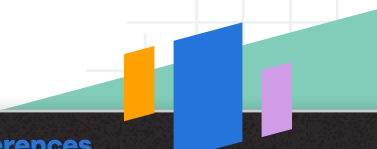
Automated reference recommendations directly in Salesforce

Salesforce native reference software built by sales experts for B2B sellers.

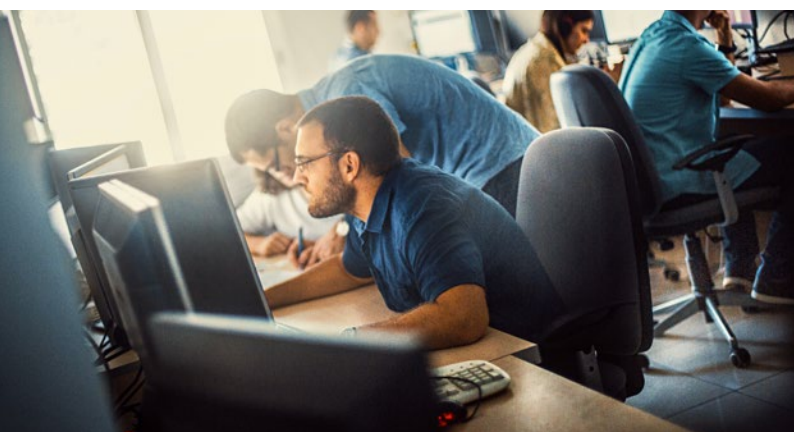**Suggested References**

Reference Account	Match	Owner	Availability
▷ Enterprise, Inc.	94 %	E. Beverly	Available
▽ SaaSy Co.	93 %	J. Long	Available

Account Information

Reference Information

Match Informat

● Sales
● Company Size
● Account Size

Strengthen trust and win deals faster with peer-to-peer sales reference calls.

Find references fast.

Get relevant sales reference accounts recommended directly on Salesforce opportunity records.

- Find peer-to-peer references automatically curated to match Salesforce opportunities.

- Automatically route new reference requests to relationship owners.

Grow your reference pool.

Launch your reference program quickly with familiar, native Salesforce controls.

- Standardize an easy, self-service sales reference request and approval process.

- Identify relevant customers for every opportunity without sacrificing the control of relationship owners.

U Altify

*Only **3%** of buyers report trusting salespeople,[1] and peer recommendations influence over **90%** of B2B buying decisions.[2]*

Create, maintain, and expand your reference pool

- Navigate the complexity of individual role changes by matching opportunities with accounts first, contacts second

- Include multiple contacts for every account

- Surface the most relevant customers—even if they're not already marked as referenceable—instead of waiting for nominations from relationship owners
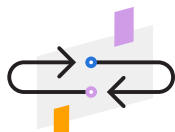
Increase control and transparency

- Hide a reference's contact details until a relationship owner approves the request

- Track when and how often accounts and contacts participate

- Track the status of pending requests
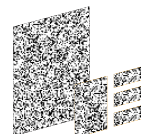
Stay in Salesforce

- Deploy in minutes with a 100% Salesforce-native app

- Onboard sellers with virtually no learning curve

- Count on the reliability, scalability, and security inherent in all Salesforce apps

Ready to get things done?

Let us show you what Sales Reference Manager can do.

Request a demo

Upland Software (Nasdaq: UPLD) is a leader in cloud-based tools for digital transformation. The Upland Cloud enables thousands of organizations to engage with customers on key digital channels, optimize sales team performance, manage project and IT costs, and automate critical document workflows.

1. HubSpot: https://bit.ly/3xOd7c5
2. ThinkSales: https://bit.ly/3gYnQJU