



GETTING STARTED GUIDE

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Overview of Service

Current Functionality - RampedUp is an account-based selling solution where we examine our customer's customers to identify their Ideal Customer Profile. With this intelligence we provide look alike companies for demand generation and score accounts inside of Salesforce. RampedUp is Single Sign-On with Salesforce and priced on a per user per month basis. We provide our customers unique / just in time / detailed data that helps sellers set better appointments and close more deals.

Salesforce.com Clean – This tool allows users to update lead, contact and account records inside of Salesforce.

Real-Time Lead Appending – As lead records come into Salesforce, RampedUp will append data to complete the lead in real-time. Leads are scored based on the Ideal Customer Profile

Salesforce.com Sales Intelligence – This is the battlecard that sits inside of the Account / Lead / Opportunity record in Salesforce. There are 5 tabs on the Battlecard.

- **Company** – Firmagraphic data / Trigger Events. Accounts are scored based on the Ideal Customer Profile. User can import into Salesforce
- **Contact** – 15 contacts fitting the ideal buyer. – User can import into Salesforce
- **Customer** – Lookalike customers based on industry, size, location, competition, buyer, product
- **Competition** – Top 4 competitors of the company
- **Technology** – Installed technology of the customer

List Generation - Three databases People, Companies, Trigger Events. Users can push results of one database to find information in the other. Results can be imported into Salesforce. Users can set up Email Alerts for Triggering Events.

Customer Insights – A blend of Salesforce closed won opportunities appended with RampedUp data. Users can find look alike companies based on the results of their search.

Win Stories – Functionality that allows a seller to provide his / her narrative on the details of the deal. Win Story questions are tailored by company, sellers and managers are emailed to complete story.

LeaderBoard – Highlights recent wins, sellers, and geo-mapping new accounts

Initial Set Up

Getting started with RampedUp is easy. First thing to know is that RampedUp works inside of Salesforce.com. This is to make your job and the jobs of your sellers that much easier. Logging into RampedUp simply requires you to log into Salesforce.com. The Single Sign On functionality will allow admins to seamlessly move between both platforms. This also means the rights and privileges of the Salesforce.com users transfer over the RampedUp as well.

1. Create a RampedUp Account by clicking here – https://basic.rampedup.io/signup_sf and then connect with Salesforce.com. Reminder – only SFDC admins can sign in initially. Our platform requires API access with Salesforce.com to bring over opportunities, users, leads, accounts, and contacts. Only accounts with API access can use the Salesforce.com plug-in.

2. Place RampedUp Inside of Salesforce.com

- Select All Users to enable the plug-in for all users of the platform. (You could also select a portion of users)
- The RampedUp Plug In can be placed on an Account / Leads / Opportunity tab.
- From the **admin set up**, first select Account / Leads / Opportunity section you would like to place RampedUp and then go to the Page Layout.
- Edit the Page Layout
- Under Fields, drag and drop a Blank Section field in a prominent area of the page.
- Label the new section RampedUp and select a one column page layout.
- Click Save.
- Under Visual Force pages at the bottom of the Opportunity / Account / Lead layout selection drag RU Basic Opportunities / Accounts / Leads to the recently created RampedUp section.
- In the right hand corner of the section a small wrench allows you to edit the properties.
- Click the wrench until you see a Visual Page Properties
- Change the Height (in pixels) to 400 and select the show scroll bar.
- Click OK.
- Click Save.
- Repeat these steps for Opportunities / Accounts / Leads.

Users: RampedUp provides functionality to import users directly from Salesforce.com. The **include users** button will import users from Salesforce.com and the admin can select the users to import into RampedUp from the picklist. An email is sent to the selected users for them to activate the account. An

admin can promote a user to Admin of RampedUp or resend the email notification for activation. The admin has full functionality rights.

*A user must accept the RampedUp notification to view RampedUp inside of Salesforce.com.

Customizing RampedUp

You can customize RampedUp using the [Admin Settings](#) from the Admin tab to tailor your instance of RampedUp. The Edit company information button allows you to complete or edit your company details for our records.

The Battlecard is the Salesforce.com Visual Force Plug-In. You can customize the Battlecard in the following ways by toggling the functionality off/on.

Enable Win Stories: This will allow your sellers to be notified of their recent Wins via email and add additional information such as how they won it, competition, products, buyers etc. This can be toggled on and off depending on the need.

Import Battlecard Contacts As: This functionality allows the admin to dictate if imported records are contacts, leads, or allow the user to decide.

Enable Check Duplicate For Leads/Contacts Import: This functionality will check for records before importing into Salesforce.com

Enable Clean: This functionality empowers the user to clean their own account records.

1. Update and complete the Company information
2. Update and complete the Contacts associated with this Company
3. Upload new contacts that are potential buyers associated with this Company
4. Identify the old contacts and label them INACTIVE

Contact Import: This field limits the number of contacts / leads the users can import into Salesforce.com

Enable Clean: This feature will allow the user to clean their account inside of Salesforce.com. This will append new contacts, identify INACTIVE contacts, and complete account and contact records.

Enable Client Match Scoring for Accounts. This functionality can be toggled on to score your accounts. A star is awarded for each of the following categories when the account has a match (not in any order):

- One of top 5 industries based on your clients
- One of top 5 market segments based on your client employee count
- Preferred Technology you select based on your product/service
- At least one contact with preferred title based on your selected buying committee
- Recent trigger event article showing activity over last 90 days

Decision Makers This section allows the admin to key-in the titles of the Decision Makers to populate the Decision Makers tab inside of Salesforce.com. We recommend that you be very specific as we are searching the public web for

these titles and you are limited to 15 results. We default the term Chief to ensure results from the onset.

This feature will ensure your battlecard is exposing ONLY the decision makers you key into the system. It will also ensure your Accounts are scored appropriately when these people are present in the battlecard.

Setting Up Buying Committees - If you have multiple sales teams that sell to different buying committees, you can set them up in the Buying Committees section. This allows the admin to assign titles to groups or committees. These committees can then be assigned to users in the user table.

Pro Tip: *You can make the Decision Makers functionality default for leads search.*

Products - This section allows you to limit the products the sellers can choose from when creating a Win Story

Competition - This section allows you to limit the competitors the sellers can choose from when creating a Win Story

Setting Up Preferred Technologies: This field allows the admin to select the competitive or complimentary technologies that are important to your sales process. Once selected, these technologies will be exposed on the home page of the Battlecard so that users will know if the company associated with the lead, account, or opportunity uses those technologies.

Pro Tip *We have a Third Party that helps find additional technologies kept in the Others Category. After you have found your preferred technologies - go into the Others category and if they are there - add those too. This will really help with account scoring.*

Adding Users to RampedUp

RampedUp works inside of Salesforce.com. This is to make your job and the jobs of your sellers that much easier. Logging into RampedUp simply requires you to log into Salesforce.com. The Single Sign On functionality will allow you to seamlessly move between both platforms. This also means the rights and privileges of the Salesforce.com users transfer over the RampedUp as well

RampedUp provides functionality to import users directly from Salesforce.com. Proceed to the **Users** tab from the Drop-Down Menu in Admin Settings. The “Include Users” button will import the users and the admin can select the users from the picklist. An email is sent to the users for them to activate the account. An admin can promote a user to Admin of RampedUp, demote a user or cancel their subscription. They can also resend the email notification for activation. The admin has full functionality rights so be mindful of your considerations.

Please note, a user must accept the RampedUp notification to view RampedUp inside of Salesforce.com and only Salesforce.com users can be RampedUp users.

Assigning Buying Committees to the user: Edit the user by selecting the name. The admin can select a committee from a drop down menu. This will limit the results of the contacts to the titles assigned to the committee

Setting Contact Download Limits: Admins can select the number of records a user can download by selecting the users name.

Assigning a Manager: Admins can manually assign a manager to a user. This will allow RampedUp to notify the manager of Win Story notifications

Promote to Admin: Admins can promote users to Administrators with all rights and privileges

User Reporting Fields:

Search Download Limit	Total number of contact downloads / imports
Monthly Download Limit	Monthly number of contact downloads / imports
Yearly Download Limit	Annual Number of contact downloads / imports
Trigger Events Search Created	Has user created a trigger event notification?
Chrome Extension	Has user enabled the Chrome Extension?
Last Login	When did the user last log-in?
Subscription	Is the user currently an Active RampedUp user?
Accepted Invite	Has the user accepted the Rampedup Invite?
Admin Access	Is the user an Administrator?

Salesforce Cleaning Tools

B2B Contact data expires at a 24% – 36% rate per year. That number compounds when you consider the manual entry errors prone to sellers and the bad data uploaded from third party lists. The result is a Salesforce.com instance with highly inaccurate, incomplete, and outdated data. No wonder sellers look at Salesforce.com as an administrative burden and not a strategic tool to advance deals. That's why we created RampedUp, we know that if sellers trust the data in Salesforce.com they will use it more often.

Data Cleansing – RampedUp will identify the contact records inside of Salesforce.com and place the INACTIVE term on the First Name field. This way sellers can immediately know the contacts that they should solicit.

Data Appending – RampedUp will validate the contact records inside of the account and add fields such as title, phone, and email address if it is blank.

Net New Leads – When RampedUp identifies INACTIVE contacts at an account, we share where the contact has moved with contact details. These contacts and details are added to Salesforce.com as Leads to reengage.

How to set up Data Appending tools:

The **Appending** tab in the Admin Settings is reserved for Appending Contacts and Accounts directly inside of Salesforce.com

- **Append Contacts:** This functionality allows RampedUp to append existing contacts, identify INACTIVE contacts, and create Leads for Contacts that are in your database but are now at a new company.
 - **Create Contact Date**
 - **Company**
 - **City**
 - **State**
 - **Country**
 - **Append Salesforce.com Contacts:** This button allows RampedUp to append Contact data under conditions set forth by the below rules. This function can be run as often as needed but must be facilitated by the admin.
 - **Append Contact Field Mapping** will allow the admin to select and map the fields from RampedUp to import into Salesforce.com.
 - **Include in Import:** Will allow RampedUp data for import
 - **Always Overwrite:** RampedUp data will overwrite data in Lead Field
 - **Overwrite only when customer value is blank:** Conditional Rule

- **Import Inactive Contacts as Leads:** By selecting this box you are allowing RampedUp to identify contacts that no longer work at the company you have them associated inside of Salesforce.com and import them as new leads at the new company where they are employed. This helps keep Salesforce.com Clean
- **Append Accounts:** This functionality allows RampedUp to append Account records inside of Salesforce.com
 - **Append Salesforce.com Accounts:** This button allows RampedUp to append Account data under conditions set forth by the below rules. This function can be run as often as needed but must be facilitated by the admin.
 - **Create Contact Date**
 - **Company**
 - **City**
 - **State**
 - **Country**
 - **Append Contact Field Mapping** will allow the admin to select and map the fields from RampedUp to import into Salesforce.com.
 - **Include in Import:** Will allow RampedUp data for import

Manual Appending: This functionality is found on the appending tab in Admin. This feature allows a user to manually upload a list of contact records for updating and appending. There is an email validation component and a contact validation. We blend the two validation services together to create one email intelligence score:

Blue = Personal Email Address

Black = SPAM TRAP

Red = Bad Email or Old Contact

Yellow = Medium Risk

Green = Good Email or Current Contact

Setting Up Real-Time Lead Appending:

RampedUp will append incoming leads in real-time inside of Salesforce.com! The process is simple, if we have an email address, personal or professional, we can add the type of information sellers need to make informed sales calls.

Append accurate title, company, industry, phone number, size and location to incoming leads. When you add the RampedUp Plug-In you can also find triggering events, installed technology, and look alike customers. The only sales intelligence tool you need.

Reporting: RampedUp will send a daily report to the Salesforce.com admin detailing the appended leads over the past 24 hours. The admin can then download these leads into CSV for reporting purposes.

How to set up Real-Time Lead Appending:

The Appending tab in the Admin Settings is reserved for Appending Leads, Contacts, and Accounts directly inside of Salesforce.com

Lead Imports: This will enable RampedUp to append Leads as they come into Salesforce.com. Toggle the Lead Import functionality to ON/OFF to govern the functionality.

- Leads Appended – This section details all the leads RampedUp has appended on your behalf
 - Download CSV – this will allow for downloading the leads into a CSV based on the following:
 - The last 24 Hours
 - Appended Dates
 - Company, City, State, Country
- Enable sending of appended leads daily report. – This functionality will send you a daily email to all administrators to review the leads that RampedUp has appended in the last 24 hours.
- Append Fields Mapping; will allow the admin to select and map the fields from RampedUp to import into Salesforce.com.
 - Include in Import: Will allow RampedUp data for import
 - Always Overwrite: RampedUp data will overwrite data in Lead Field
 - Overwrite only when incoming value is not blank: Conditional Rule
 - Overwrite only when customer value is blank: Default Conditional Rule

Pro Tip RampedUp can accommodate custom fields as well as create a "Modified by RampedUp" field. For the Modified By RampedUp field to work, you would need to create a Checkbox custom field and it should be named 'ModifiedByRampedUp' for either Leads/Accounts/Contacts objects on your SF

instance. You would also need to set it the "Include in Import" and "Always Overwrite" to start appending the field also.

Adding Win Stories

Your customers are your biggest competitive advantage in sales yet are the most difficult for sales people to find. Just mentioning customers that have found success using your products and services greatly increases your chances of winning. A recent study from SAP found that **sharing relevant customer stories influences 89% of Buying Decisions**. That's why we created RampedUp

RampedUp finds your customer data and turns it into Win Stories. A Win Story is a mashup of account and web sourced information to provide sellers rich customer detail. We categorize Win Stories by **size, location, city, and state** for quick reference.

A **Win Story** is self-populating with company information such as description, industry, and location. We create a Headline with the sellers picture and company logo for a compelling read. Account details include close date, amount, and source. The Win Story can be edited to include more detail however it isn't required.

To Set Up Win Stories for usage inside of your instance do the following:

From the Admin Tab, click Import Opportunities to begin the process of building Win Stories and select the throttle options. The throttle allows you to pull "Closed Won" Opportunities from Salesforce.com based on any or all of these criteria:

- Close Date: This will ensure only more recent opportunities are pulled
- Amount: This will ensure only deals over or under a certain amount are pulled
- Active Reps only
- Account: This will ensure only certain accounts are pulled
- Product: This will ensure only certain opportunities where this product are pulled

The filter will stay active for the Opportunities API service pulled from Salesforce.com every 12 hours. If there are new opportunities to import – the results will be emailed to you as an Import Report every day.

The purpose of the Opportunities tab is to allow for a central location for the Admin to edit Win Stories that will populate throughout the app. We do not require Admins to complete or edit Opportunities –however the admin can edit the Opportunity if needed.

Win Stories Questions: This will allow for you to build questions to help sellers create a more detailed win story. Choose from a drop down menu of Products, Competitors, Rep Narrative, Buyers. These are fields that do not come over from Salesforce.com in the import and need to be populated by the rep to exist in

the customers and Win Vault fields. The system has default questions aligned with fields inside of the Win Story but you can tailor them to your sales process. **Default Questions:**

- Congratulations on the Win – can you give us a couple of sentences on how you did it? (Rep Narrative)
- What are some of the titles of the people who bought from you? (Buyers)
- What companies did you defeat with your win? (Competitors)
- What products did you sell? (Products)

Email Notifications: The email notifications are turned off as a default but can be toggled back on the top of the Opportunities tab. This functionality will push a series of 3 emails to the sellers that move an opportunity into salesforce.com to Closed Won. These emails direct the user back to RampedUp to edit or add additional information about their recent Closed Won Opportunity. The Win Import Report notifies the Admin of imported Closed Won opportunities. Both the email notifications can be toggled ON/OFF.

Customer Insights is a query engine that allows the user to search all of the Win Stories curated by RampedUp from Salesforce and the Web. The Win Vault defaults to pie charts for the four most popular queries; Win Stories by Source, Location, Size, and Industry. Users can further drill down on Win Stories by 11 additional criteria – including key word – that will search the company description details. By using multiple criteria, you can discover the perfect Win Story.

Look Alike Customers: Once a user has completed their search – they can search for companies that look like those customers. Results are pushed to the Leads / Company search engine and are available for download.

Setting Up Triggering Events:

RampedUp can empower sellers with critical intelligence that sparks buying decisions. **Trigger Events** are corporate initiatives (either positive or negative) that generally proceed new purchases. Unlike following a company and waiting for the trigger to occur – RampedUp finds triggers then provides company detail in context to make a sales call.

Pro Tip: Find People that work at the companies with Trigger events. You can push the results to Leads / People to find the people that work at the companies with Triggering Events.

Here are the trigger events we are following and how you can use them to advance a sales process.

1. **Partnerships and Joint Ventures** – New partnerships require new personnel, process, and software to manage the pursuit.
2. **Mergers and Acquisitions** – When companies are acquired, it's a lot like Noah's ark – there are two of everything. All is put under review to see what is staying and what is going.
3. **Corporate Expansion** – New markets require new go-to-market strategies including new personnel, facilities, and administration.
4. **Products and Services** – New products need fresh advertising, branding, and marketing. They also need new channels and sellers.
5. **Personnel** – New executives come with new agendas and most likely are a 180% different from the predecessor. As an example, a new sales executive will make \$1,000,000 in her first 90 days in the office.
6. **Legal Issues** – Companies that make it into the news for legal reasons want to tell customers and shareholders they have a plan of resolution.
7. **Research or Analysis** – Companies release independent research to share thought leadership within a certain industry or subject. These are great partner opportunities.
8. **Investment and Financing** – New money means new funding for initiatives. Venture Capitalists don't invest their money to watch it sit in the bank.
9. **Real Estate** – Changing or adding locations is the consummate sign of growth. New employees and new office space means new investments.
10. **Awards** – Companies want to show leadership that transcends profit and loss. These are often pet projects for key executives.
11. **Events** – Events are the perfect opportunity to see your prospects in person or help drive attendance to a user conference.
12. **Earnings, Performance, Dividends** – Public companies are beholden to stockholders and poor earnings often means changes are on the horizon.

Once the search has been run to the following steps to have search results emailed on a daily basis

- Select – SAVE AS NEW SEARCH
- Name the Search
- Click on View Saved Searches
- Select the MONITOR button – Click Save

Demand Generation

Our **Look Alike Customer** Modeling Feature is the First Step in an Account-Based Selling Journey. The process is simple, using the customer Insights Dashboard, we will analyze the size, industry, location, revenue and competition of your customer to reveal the traits of your ideal customer profile – ICP.

Once **RampedUp** has built your ideal customer profile – we push those traits to our Leads / Company search engine to reveal Look Alike Companies – the URL suppression functionality ensures every account is net new and NOT a current customer.

Company Search – Account Based Selling starts with Accounts. Define your Ideal Customer through 13 fields of data for net new results or import existing companies from Salesforce.com. Users can either download the company results via CSV or push to Salesforce.com.

- Keyword Search – Find emerging or uncatalogued company details by searching inside the company description.
- Buyers – Simply push the company results into the People Search to find the buyers that work at those companies.

People Search – Companies can't buy anything, people can. Use 13 fields to find these buyers from over 100 million global professionals. Ensure you are only getting NEW contact by suppressing your existing list of records from email addresses. Save searches for quick retrieval and import your buying committee for tailored results. Users can either download the contact results via CSV or push to Salesforce.com as contacts or leads.

- Web Verified – all contacts are sourced from the web with a link to the original source.
- Email Validation – all email addresses are validated at the point of purchase.
- Global – RampedUp has more contacts outside the US than inside to give the largest global data set available.

Trigger Events – All corporate initiatives start from the top and trickle their way down projects. RampedUp follows three separate new sources to categorizes trigger events into 9 separate categories. The events are associated with companies in a searchable database. Save searches or have the results emailed to users on a daily basis.

- Keyword Search – Find emerging or uncatalogued trigger event details by searching inside the headline description.
- Buyers – Simply push the trigger events results into the People Search to find buyers that work at companies within the trigger events.