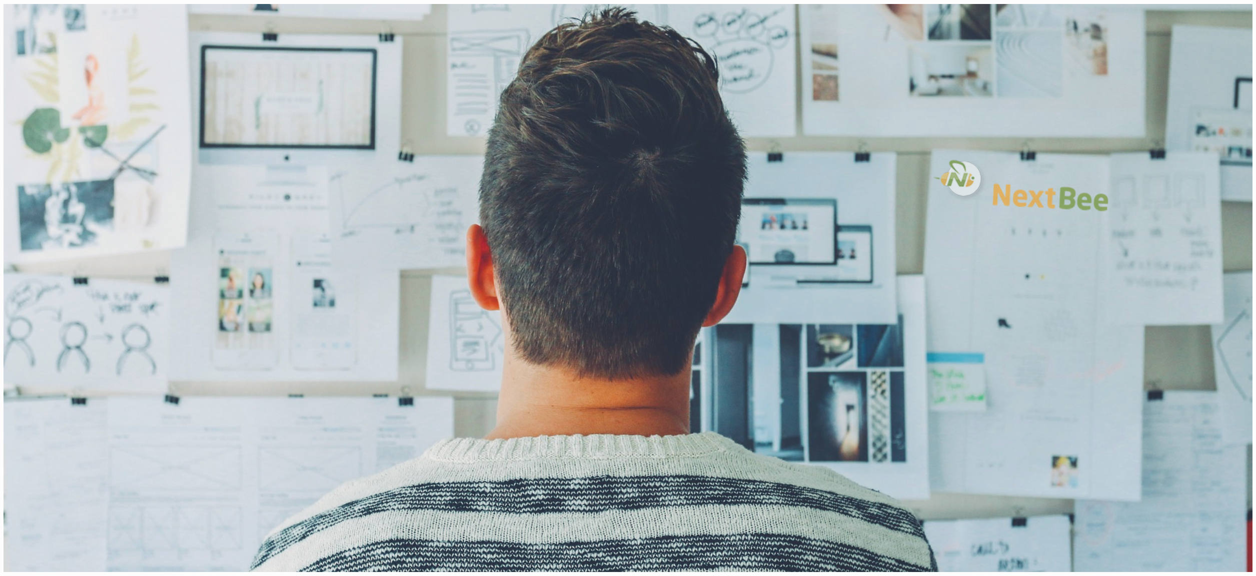
3RD PARTY INTEGRATIONS

COMPLETE OVERVIEW



A Word About Integrations

With any engagement plan there's always going to be a lot of questions.

- **Who is doing what?**
- **What are they doing?**
- **When are they doing it?**
- **Where is it going to take place (your systems, a 3rd party's system, etc.)?**
- **Why are we looking to engage more, i.e., what's our end goal?**
- **How are we going to engage more, i.e., social sharing, email, gamification, etc.?**

But, one of the top questions we get asked more than possibly any other is probably, "Can you integrate with X CRM?" The quick answer is usually a resounding "Yes."

NextBee, having been in this space for a decade, is perhaps the most flexible and robust engagement platform available. **We have the capability to cleanly integrate with nearly every system available.**

In this guide we're going to discuss common integrations, questions to ask prior to integrating, implementation details, NextBee's architecture and take a look under the hood.

NextBee Can Cleanly Integrate with Nearly Anything!

NEXTBEE MAKES IMPLEMENTATION SEAMLESS, QUICK, AND PAINLESS.

100%
SATISFACTION GUARANTEE

Toll-Free:
800-547-1618

WHAT TO ASK BEFORE YOU CREATE & INTEGRATE ANY ENGAGEMENT PROGRAM

When it comes to integration, there really can be a near endless amount of questions coming from pretty much everyone involved, and some questions are more important than others.

While there are some definite core/key questions you need to be able to answer before you integrate your customer engagement project (they're below) you need to consider two important things...

WHAT'S THE BIGGEST CONCERN?

If you're like most companies who find themselves requiring an integration in order to successfully launch a program such as a customer referral, employee referral, customer loyalty, or a gamification program then your biggest concern is controlling so much data that's in so many places, making sure it all talks to each other and that it's safe.

When we here at NextBee consult with a company, we strive to nail down what their most important integration goals/needs are. Once we know what information our clients absolutely need, e.g.;

- **What do they need reported? (Referrals, Shares, etc.)**
- **Why do they need the reports? (tracking rewards for accounting, etc.)**
- **Who needs the reports? (Sales, Marketing, Accounting, etc.)**
- **Who needs access to the data? (tiered data, compliance needs, etc.)**
- **And finally; How do they plan to use the data for rewarding or motivating users? (i.e., How are they going to keep the program 'alive'?)**

Then we can quickly start laying out the program structure and integration.

Program development and integration comes from ensuring that an open line of communication exists between our teams and the client's teams.

It's more important that any company you chose for developing an engagement marketing program, that you make sure they are doing the same for you and your team (which is rather uncommon).

Also, speak up and voice any concerns in the beginning rather waiting until well into the project only to find out something didn't integrate the way you wanted or expected. The next key question you need to get an answer for is...

WHO WILL BE INVOLVED IN THE INTEGRATION?

Engagement programs often bring together numerous teams within a company. One way to make the process of building a custom engagement program easier is to double check that all key people are considered.

Otherwise, it can just make things "messy" and cause unneeded friction between departments. We prefer, when bringing different departments together such as Marketing, Sales, Accounting and IT, to make sure everyone who is involved has clearly defined paths and a voice for the project.

Each of our engagement programs comes with a dedicated account/project manager and while this all takes some legwork up front, it certainly pays off in the end making a much more successful engagement program.

The above two integration questions are probably the most important ones to start with, but as I mentioned, there are a few other questions you might want to ensure your team has considered ahead of time and they are:

- **What sort of systems do you need to integrate? Are you integrating a CRM, QuickBooks, or another 'homegrown' type of report or spreadsheet?**
- **Where will the data live and how can it be accessed?**
- **What systems are you planning on integrating?**
- **Who will manage your new system moving forward?**
- **Who will manage the new system moving forward?**
- **Who will be your internal champion?**

Knowing these answers up front, who will be working on what segment and how you're going to use the data will allow you to keep a clear line of communication when issues arise.

COMMON INTEGRATIONS LISTS

Here at NextBee, our team of skilled professionals have a wealth of experience integrating various engagement efforts (employee referral programs, gamification programs, B2B referral programs, etc.) into the common, and not so common, management software systems. Here is a partial list of integration options.

Common Customer CRM Integrations List

HubSpot	NetHunt	Salesforce	CompanyHub
Less Annoying	OnePage	Freshsales	C2CRM
Pipedrive	Nutshell	PipelineDeals	Zendesk Sell
Copper	noCRM.io	Nimble	bpm'online
Salesflare	Membrain	Affinity Relationship	Intelligence
Zoho CRM			

Common Employee Software Integrations List

Gusto	Connecteam	Workday	Oracle: Peoplesoft
Kissflow	Bullhorn	Litmos	15five
Halogen	Employee Navigator		

Common Partner CRM Integrations List

Allbound PRM Reviews	ChannelCandy	Impartner PRM	channelIT
Zift Solutions	ChannelKonnect	ZINFI	ChannelValue
Magentrix PRM	Convey Portal	Salesforce Partner	EcoSoft 4.0
		Relationship Mgmt.	
LeadMethod PRM	Elioplus PRM	Channeltivity	Gorilla Corporation
NetSuite CRM+ Partner	IBM Partner	PartnerStack	LogicBay
Relationship Mgmt.	Engagement Mgr	Mindmatrix	Perks WW Enterprise
IBM B2B Collaboration	Partnerize Partner		Engagement Engine® (E3)
	Mgmt. Platform (PMP)		
Oracle Partner	PRMDeals	Workspan	Scalus
PartnerPath	Shuttle	PartnerPortal	StructuredWeb
TUNE (formerly HasOffers)	TapFwd	Agentcis	Trak.io
BasisPoint	Webinfinity	Blueroads	

“ ★★★★★

NextBee's team is stellar and will work alongside you to ensure your program success.

Learning A-Z

“ ★★★★★

NextBee has been tremendous in putting in place all the variables for us to be successful!

ENIVAHealth

INTEGRATION EXAMPLE: SALESFORCE

SalesForce Store	NextBee Store
• Referrer Contact Information	• Referrer profile along with SF record ID
• Associated Sales Rep	• Referral Invites
• Rewards Received	• Invite Open/Click Data
• Referee Lead	• Referrer Reward Points
• Opportunity	• Reward Preferences

UNDER THE HOOD

Referrer Registers	Referee Submits Lead	Contract Closes	Referrer Claims Reward
Create a new 'Contact,' 'Personal Account' or custom object 'Referrer' (optionally, assign it to Sales Rep through SF workflow) and persist this record ID information in NextBee 's system. Each referrer record in NextBee has a unique SF ID and this ID is used for the tracking purpose	Based on (referrer) URL parameter (which has the referrer's SF ID passed by NextBee) set cookie on user's browser and when the lead is submitted pass this value as hidden field in your lead form. Similarly, for telephone call in lead, if user is referred by a particular referrer, then enter referrer's SF ID in the lead record	NextBee server will query* each night the leads (and associated converted opportunity records) with non-empty referrer value (optionally within specific campaign) and issue referrer either waiting credits (for lead submission) and approved credits for closed opportunities	When a referrer receives credit points or redeems reward, NextBee collects tax forms and referrer reward details to referrer's record in SF. Optionally, each activity of the referrer (sending emails or sharing social posts can be posted to SF records). It is also possible to give ad-hoc credit to a referrer and NextBee's system can pull in this data to give the referrer bonus points Referrer

IMPLEMENTATION DETAILS

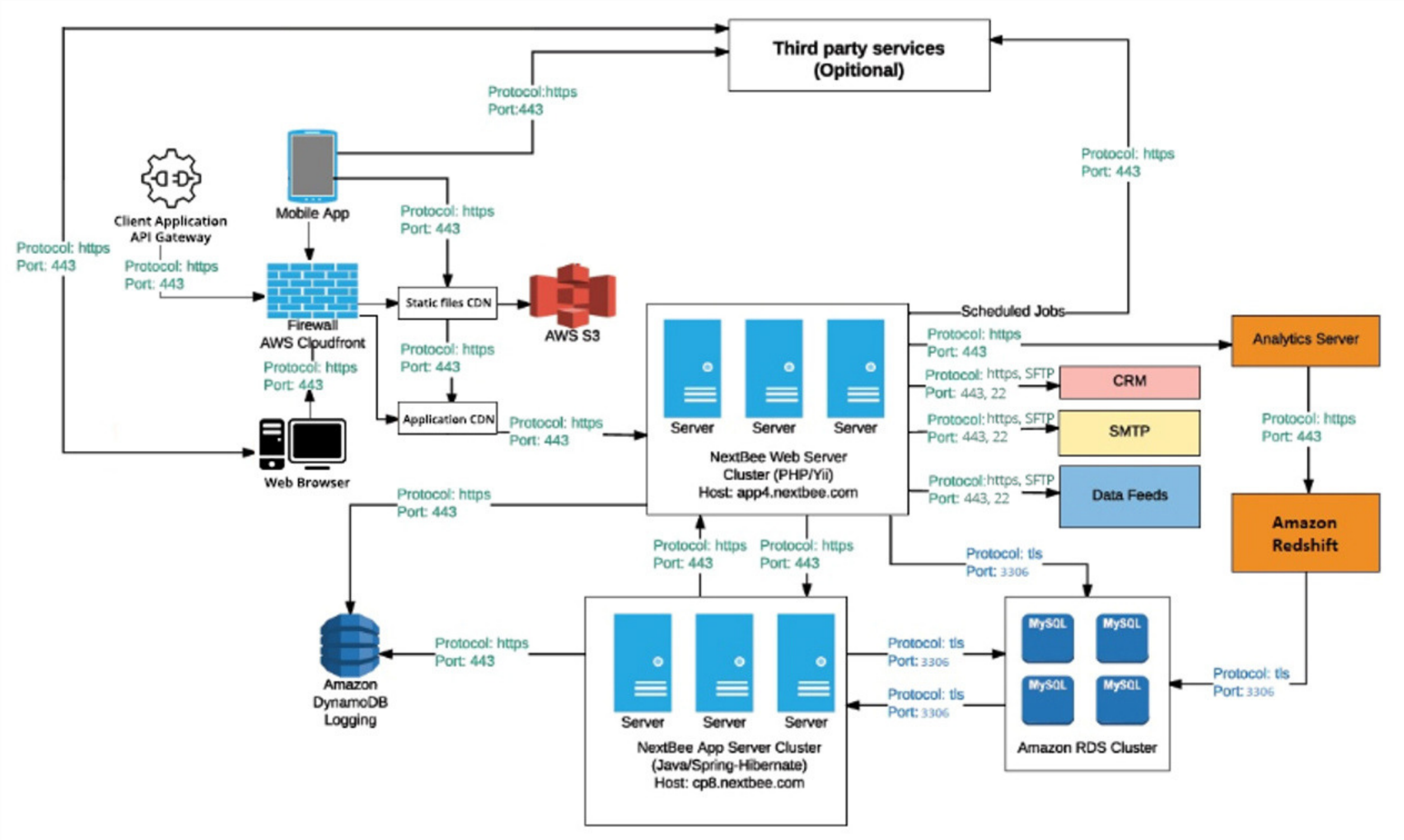
- Work Division

  – **Client Team**
  - a. Create custom fields and custom objects in SF
  - b. Give NextBee team access to the Enterprise WSDL
  - c. White list NextBee QA team IP address to review data

  – **Next Bee Team**
  - Query SF data and map that to NextBee data objects with custom data parser matching client's SF data schema
  - Process NextBee data objects
  - Post back data to SF
  - If admin interface within SaleForce is desired then option to install a connected app within SalesForce

*By default NextBee polls the data every night for updates but it's possible to install a code in your Salesforce org to trigger POST calls to NextBee end points on record updates.

NEXTBEE ARCHITECTURE



IMPLEMENTATION DYNAMICS

Offer

Widgets

Graphics

Scripts

• Based on our insights and your preferences, we will build everything that is needed in the program within ~3 to 4 weeks.

• We will keep you updated throughout the setup process.

• Once we have done the legwork, your team will need 1 to 3 hrs of integration time to integrate the widgets in your website (based on your website platform we will send customized setup instructions to your team).

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CONCLUSION

Creating any engagement program is a great way to create a community, build brand advocacy, and create long term loyalty for employees, partners and customers. Integrating into your current systems makes the process even easier and more readily adopted by users, staff and management. NextBee's staff of developers and account managers will work hand in hand with you to integrate our AI Powered Community Engagement Platform and get you up and running with industry best practices quickly.

NextBee has 10 years of experience helping companies create and integrate full engagement programs that create loyalty, generate referrals and grow your brand's ambassadors.

If you have questions about integration and would you like to see real-world examples of companies using what this guide has discussed then connect with us today!

Get A Free Personalized Integration Strategy Session
Email: Sales@NextBeemedia.com
Schedule A Meeting: http://bit.ly/NextBee-Meeting

Trusted by Leading Brands - Loved by Small Businesses

"NextBee has helped by implementing and maintaining a robust loyalty program which provides incentives for our customers to initially begin purchasing with us, to continue to purchase with us and to share any of our products with people they know and to also be good ambassadors of Eniva products."

Mary Veloske
Vice President
ENIVAHealth

Legrand enriches channel sales training and drives performance through rewards and gamification

Florida Power and Light drives channel partners referral leads through their app based community

Wyndham Resorts boosts in-house sales performance and retention through NextBee's gamification and recognition features