

# IMPLEMENTATION PROCESS

AGILE, RESPONSIVE, & RESOURCEFUL



## Implementation Made Easy

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 manage it ongoing?

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, the best practices to get you started and the support to see you to success.**

In this guide we're going to discuss planning, common integrations, questions to consider prior to integrating, and other implementation details.

We hope to give you the basic information you need to launch your engagement program but realize this can't answer everything, please reach out with questions!

**NextBee's Customer  
Centric Approach  
Guarantees Your Success!**

“★★★★★

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



Toll-Free:  
**800-547-1618**

## IMPLEMENTATION QUESTIONS & CONCERNS

When it comes to implementation, 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 begin, it's not necessary to get everything answered. Instead, we have found that some of our most successful programs have been ones where we launch in phases. Our team works hand in hand with yours to define features, deliverables, timelines and who owns which part of the process. Developing an engagement program should be an exciting and fun process, not another burden which is why we use our decade of experience to make the process easy and seamless. So, how does the process usually start and proceed? We start at the beginning...

### WHAT'S THE BIGGEST CONCERN?

If you're like most companies who find themselves starting a program, your biggest concern is probably centered around controlling so much data that's in so many places, making sure it all talks to each other and that it's safe.

Typical client questions usually include variations of...

**" How are the earned rewards communicated back to our CRM (Magneto, Salesforce, etc.) so customers can use them with online purchases?  
Does NextBee integrate completely with X CRM so that promotions are set up?  
If not, would I be given an electronic file of the earned rewards and then be responsible for creating them in our CRM? "**

The simple quick answer to these is that, NextBee is able to completely & seamlessly integrate with the majority of CRM software (see below for a list of the most common ones).

And we work with every client to setup everything and continue to assist as the program keeps moving forward.

This allows for the client to have very little extra effort or resources for integration and implementation.

One of the first parts of implementation is for us to consult with your company and nail down what your most important program goals are. Once we know what information our clients absolutely need, we can then quickly start laying out phase one of the program's structure and integration. Common questions include:

- **Why will people participate in the program? (Motivation, Incentives, etc.)**
- **What activities will the user be rewarded for and what do you need reported? (Referrals, Shares, etc.)**
- **Why do you need the reports? (tracking rewards for accounting, etc.)**
- **Who will be driving engagement and who needs 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'?)**

Program development and integration comes from ensuring that an open line of communication exists between our teams and the client's teams. Each client is assigned a Senior Project Manager (SPM) and the SPM becomes the primary point of access who can quickly answer or triage any questions or needs.

Now that we've covered some of the general implementation process, let's dive a bit deeper on integration by looking at an example of a more common integration - Salesforce.

## INTEGRATION EXAMPLE: SALESFORCE

SalesForce Store	NextBee Store
<ul style="list-style-type: none"> <li>• Referrer Contact Information</li> <li>• Associated Sales Rep</li> <li>• Rewards Received</li> <li>• Referee Lead</li> <li>• Opportunity</li> </ul>	<ul style="list-style-type: none"> <li>• Referrer profile along with SF record ID</li> <li>• Referral Invites</li> <li>• Invite Open/Click Data</li> <li>• Referrer Reward Points</li> <li>• Reward Preferences</li> </ul>

## 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.

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



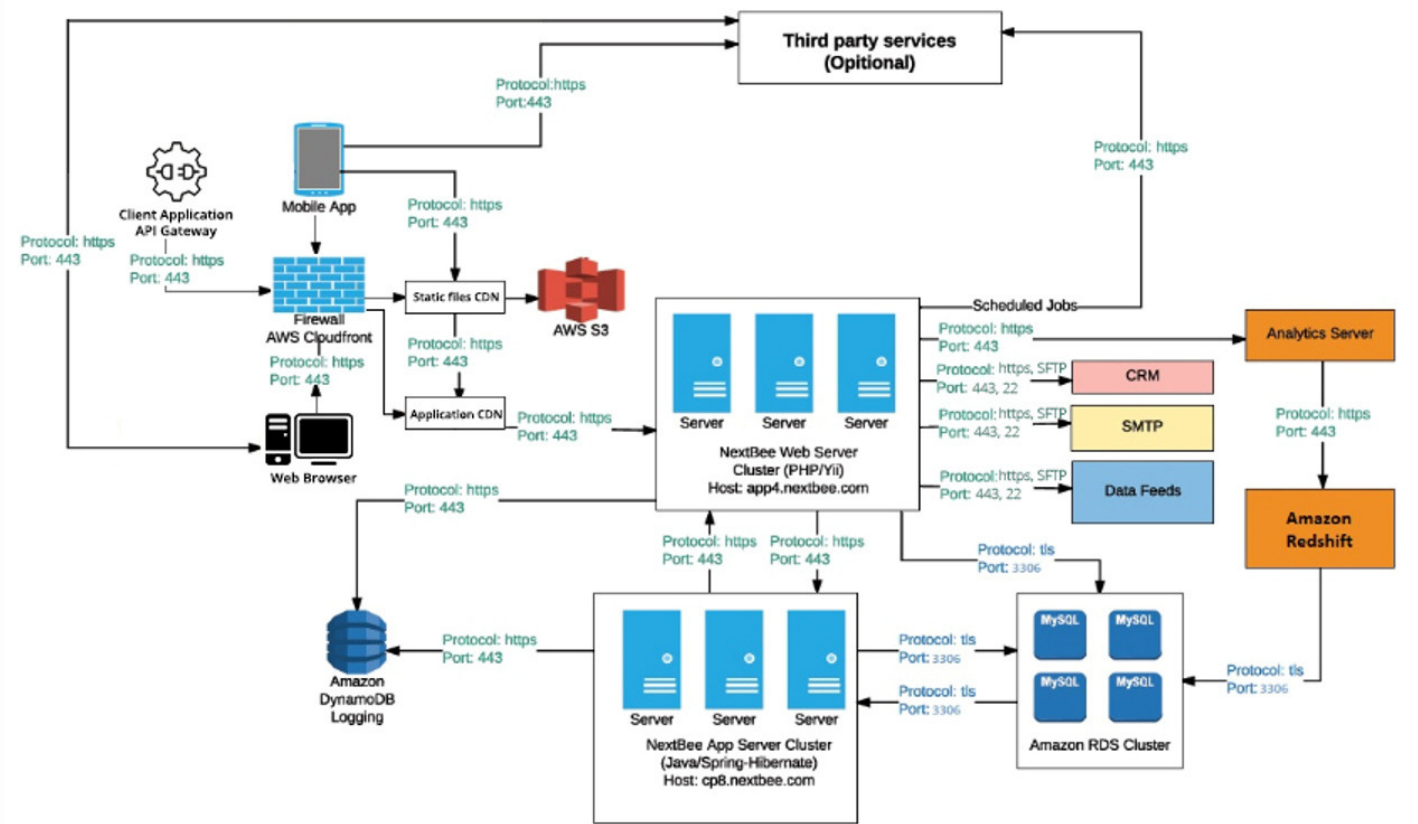
NextBee's team is stellar and will work alongside you to ensure your program success.



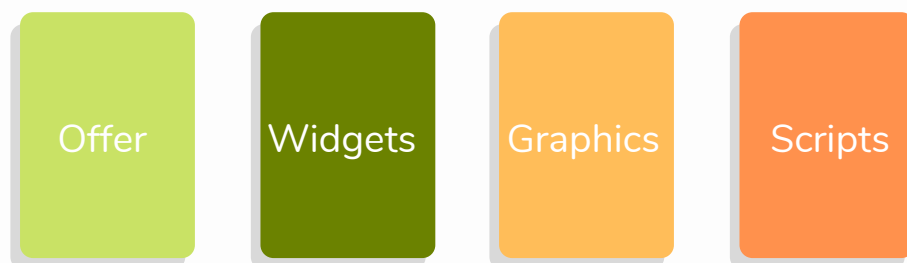
NextBee has been tremendous in putting in place all the variables for us to be successful!



## NEXTBEE ARCHITECTURE



## IMPLEMENTATION DYNAMICS



- Based on our insights, your preferences and using a customer centric approach, we will build everything that is needed in the program within ~3 to 4 weeks.
- An Agile and Responsive process means we will keep you updated throughout the setup process and change directions, if needed to guarantee 100% implementation success.
- Data Integration with CRM, POS, etc. as defined in SOW is completed and made ready for testing with client teams.
- Once we have done the initial 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).





Toll-Free:

800-547-1618

## 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](mailto: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