Welcome to Upshot!

To help you get started with the Upshot platform, we've created this document to provide you with information on how to source, create, and distribute an Upshot story as well as facts and best practices. If you have any questions or concerns, please do not hesitate to reach out to Danielle Kehoe (dani@influitive.com) or Jacob Cleveland (jacob@influitive.com).

Thank you for choosing Upshot to help capture your customer's voice, and we are thrilled and honored to be your customer content partner.

–The Upshot Team

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Getting Started with Upshot

Congratulations on purchasing Upshot, the easiest way to create authentic customer stories that convert! Below are a few steps to help you discover, create, and distribute impactful stories from your best customers. Let's get started!

Sourcing

- Shortlist – On your Upshot dashboard, you'll find the Shortlist tab. The Shortlist is a central library of potential Upshot contributors, and it contains all the needed information to create an Upshot story.
    - For ideas on how to discover customers with a great story to tell, see 4 Steps to Sourcing Customers for Amazing User-Generated Content on page 6.
    - At Upshot, we're experts in discovering the best story your customers have to tell, so during the sourcing phase, we urge you to think less about the end story and more about the audience. Add customers to the Shortlist who fit the buyer profile you want to attract. Think about industry, title, and sales objection.
- Invite – Once you've added potential contributors to your Shortlist, it's time to start sending invites. Now, not every customer will have the time or desire to create an Upshot story, so it's important not to get too focused on a single contributor. We encourage you to invite several customers at a time. This will ensure a higher story completion rate per month/quarter.
    - Upshot provides an invitation template, but we also encourage you to customize this template to each invitee. Add something personal that will resonate with your customer and make them feel special. Upshot provides your customer with a premium, personal experience, and this is where that experience begins.
    - The Upshot invite-to-published conversion rate is around 35%, so keep that in mind when sending invites, and try to send them out in batches.

Story Creation

- Once your customer has accepted the Upshot invitation, they will schedule a short interview with their personal editor who will help them discover the most impactful story to tell. You can watch this process progress on the individual story card in your dashboard.
- Vendor Fact-Check – After the story has been written and your customer has approved the draft, you will receive an email letting you know that it is ready for your fact-check. This step in the process gives you the opportunity to ensure your brand, products, and services are spelled correctly and represented factually. To assist you in the process, we've created a Vendor Fact-Check Guidelines document (found on page 14).
- Call to Action (CTA) – Every Upshot story comes with its own configurable CTA. This allows you to turn readers into leads. During your fact-check, you'll be prompted on the story page to upload a CTA. The story must contain a CTA to be published.
    - CTA dimensions are 1400px (wide) and 700px (height).
    - CTAs that point readers to a demo perform the best.

Distribution

- During the contributor approval phase, Upshot gives contributors the chance to link their social media accounts (LinkedIn and Twitter) to easily distribute their story to their professional network. We automate sharing at peak times: 3 shares in each network over 3 days. However, we will never post, like, or comment on your customer's behalf outside of the story distribution.
- To get maximum reach and ROI from your Upshot story, we've created a document on how you can help with story distribution, which can be found on page 9 (5 Ways to Distribute User-Generated Content (UGC) for Maximum ROI).

Contributor Experience

Upshot knows you work hard to maintain excellent customer relationships. That's why we designed the Contributor Experience to give your customers a high-touch premium service unlike any other. From invite to post publishing, they receive one-to-one support from their personal editor to ensure the relationship you've built over the years is nurtured and enriched.

In fact, Upshot Contributors consistently rate their experience as a nine or above on our NPS survey, stating that deepened vendor relationships was their driving motivation for accepting the Upshot invite. Here are just a few comments we've received from past Contributors about their Upshot experience:

"When I saw the first draft I was floored. In such little time Upshot was able to capture my story and the nuances." *Benoît Hébert, VP, Business Development & Licensing at Pediapharm Inc.*

"This is fun! How do I do another article?" *Brittany Lui, Senior Manager, Customer Marketing at HireRight*

"This was so much fun!" *Robert Fehrmann, Data Architect at SnagAJob*

Contributor Benefits

- Thought Leadership
  - Many of your customers are looking to increase their professional opportunities—speaking engagements, career advancement, professional recognition—and an Upshot story is a terrific way for them to showcase their expertise and reap the benefits of thought leadership without having to spend hours and days creating the necessary content.
  - With the help of a dedicated professional editor and writer, they can share their experience and expertise with minimal time commitment and at no cost to them.
- Deepened Vendor Relationships
  - From our contributor surveys, this is the number one reason contributors site for creating an Upshot story.
  - By helping you share the benefits of your products and services, Upshot contributors look to gain a more mutually beneficial relationship. This could mean an invitation to speak at your next user conference, added support in times they need it most, or simply the knowledge that they've helped a company who has been instrumental at making their job and life easier.
- Inspire Their Peers
  - Before your customers found you, they all faced hard challenges. By sharing their expertise, they are able to help others who are struggling with those same problems. In fact, inspiring others is the number two reason contributors cite for producing an Upshot story.
  - When creating an Upshot invite, we recommend highlighting the success your customer has experienced and encouraging them to use this success as an example for others.

Contributor Experience, Step by Step

- Once Contributors receive your personalized Upshot invitation, they are directed to a landing page where they can sign up for Upshot using their LinkedIn profile or work email.
- The next step is scheduling a 30- to 45-minute interview with their personal editor. Contributors can choose the day and time that best suits their schedule.

- After the interview is scheduled, Contributors are asked a series of questions that provide their editor with deeper insights into their story. This process takes only 3 minutes to complete.
- They then receive an email detailing what to expect from the interview and outlining a few best practices.
- Next comes the interview, in which the editor helps the contributor discover their best story and find an interesting way to tell it. The contributor has the lead, with the editor there to steer the story and pull on threads that may reveal insights the audience will love.
- After the interview is complete, the contributor receives an email letting them know their story is in the works and they should have a draft to review in about 5 to 7 business days.
- Once the draft is complete and uploaded to the Upshot platform, the contributor is notified that their story is ready for review. Contributors have the right to all final edits in order to ensure their finished piece is authentic and one they're proud to put their name on.
- Once the contributor has reviewed the story, they approve it and connect their LinkedIn and Twitter accounts in order to queue pre-written social shares. Social shares are created in the contributor's voice and work to produce both social capital for the contributor and inbound lead gen for the vendor by veering the contributor's professional network to the story, and then to the vendor CTA.
- After the story is fact-checked and the CTA is uploaded, the story is published and the contributor receives a notification that their story is live with a link to view. The contributor then receives notifications to inform them of how their network is interacting with their story: information on who is tweeting about their story and how many readers are enjoying their content.

upshot
BY INFLUITIVE

4 Steps to Sourcing Customers for Amazing User-Generated Content (UGC)

In the new business-to-human (B2H) era of marketing, user-generated content (UGC) provides B2B companies with the ability to produce word-of-mouth marketing at scale. Your customers can now have a personal conversation with prospects and current customers using language that speaks directly to their real-world use cases of your products and services.

But how do you know which customer to showcase? You don't want to keep running to the same well, and you need high-impact stories that highlight value propositions to overcome your most common sales objections.

Let's look at how some of the most successful B2B organizations are sourcing powerful stories from vocal advocates and turning customers into celebrities and stories into qualified leads.

Step 1: Sourcing a Pool of Customers
In marketing, it can often feel like we're so far removed from our customers that we don't even know how many we have or who they are. We're so busy bringing in new logos that we forget about the ones who have been with us for years.

This is where customer success teams and sales can help. They speak to customers every day, and know who's happy, who's innovating, and who has a great story to tell. I know what you're thinking: Yeah, but they're so busy; they'll never help us identify a pool of customers. Plus, sales doesn't want to do anything that might jeopardize a renewal or upsell.

But just like we want to frame the offer to the customer starting with the benefit (See Step 3), we need approach CS and sales teams as a partner in their success as well. First, let's start with CS.

Customer success teams are our advocates' advocate. They hear every gripe, and more importantly, every victory, so get them looped into the process as early as possible. Also, if you position the offer in a way to highlight the benefit to the customer, you can help CS make happy customers even more ecstatic, and that's a win for everyone.

For sales teams, we need to think about what they'll get out of it. Now I'm not saying all sales people are only motivated by self-interest, but they do have demanding quotas to meet. So, think about how UGC can help them achieve their goals. It's well documented that UGC converts faster and more efficiently than any other piece of content. In fact, 83 percent of consumers say it would be important to read user-generated content before making a decision, and 70 percent of consumers place peer recommendations and reviews above professionally written content.

With this in mind, approach the sales team as their ally. You're there to help them close more deals faster. Remind them of the success rate of deals that include a reference call, and then frame UGC as a reference call on a page—at scale—that they can use to enhance their social selling abilities.

Step 2: Choosing a Customer Group
Notice I didn't say choosing *a* customer; that's because when your inviting customer advocates to participate in anything, some will just be too busy to participate. At Upshot, our invite-to-acceptance success is around 35 percent (much higher than the average B2B email survey response rate of 5–15 percent). It's important not to have your heart set on the "perfect" customer; instead, think about a group of customers who can help you achieve your goals.

This can be based on industry, the product/service they use, or the customer's role (either in the buying decision or use of your product/service). By lumping together customers based on the above criteria, you can align your marketing efforts to reach specific audiences, and inviting three to five at a time (not just one) helps you move the process along quickly rather than spending weeks or months waiting to hear back from that one perfect customer.

But what happens if they all say yes? First, that's not as bad as it sounds, and we'll go into detail on how to handle this scenario in Step 4.

Step 3: Frame Your Offer With a Benefit
One hurdle to generating consistent UGC is the ask. Many marketers have asked the same group of happy customers for all their advocacy needs—case studies, quotes, reviews, etc.—and asking them to participate in yet one more form of advocacy feels just a little too needy.

The trick? Don't ask. User-generated content doesn't just help your business generate new leads and build brand awareness; it also gives the participating customer an opportunity to build thought leadership.

Start with that—the benefit. And then move into the nuts and bolts of the proposal. Just like the Challenger Sales methodology created by CEB, a great salesman doesn't push his wares. She becomes a partner in success.

Your customers are human, just like you, and they want the same things. They want to be recognized for their achievements, they want a raise or better job, speaking engagements. These are the payoffs of building thought leadership, and when you offer them a way to add to their library of content with minimal work and time, you're giving them exactly what they want.

Here are a few ways to frame the offer that put the benefit first:

- Hi {Customer}, did you know conference organizers all over the world are looking for experts just like you? They're searching far and wide for people with your skill set to share their knowledge and grow our field. But they can't find you! Let us help. We'd like to offer you the chance to showcase your expertise…
- Hi {Customer}, have you gotten a raise?! Because we know you deserve one. We've heard about your recent success at _____ and we know if more people heard about it, you'd get the recognition you deserve. We'd like to help you get that admiration by offering you a chance to…
- Hi {Customer}, _____ in CS/Sales told us about the amazing work you and your team have been doing, and we'd like to make sure the rest of your organization knows just how hard you've been working. Don't let your efforts go unnoticed; get the appreciation you deserve by accepting our offer to…

Step 4: Handling the Overflow
In Step 2, I discussed why it's important to invite multiple customers at a time, but what happens when everyone says yes? Well, first you give yourself a high-five. Then, get to work.

If you kept your offer email slightly ambiguous—as in: We'd like to offer you an opportunity to showcase your expertise and be recognized in your field—then you now have a group of ready and willing customers you can utilize for other forms of advocacy. Below are a few alternatives to UGC that both showcase your customer in a flattering light and help you generate leads and awareness.

- Webinars
- Conference Panels
- Podcasts
- Video Testimonials
- Customer Advisory Boards

Notice what I left off the list: reviews, referrals, and quotes. These are all one-sided asks, which are perfectly acceptable requests **after** a customer has received value from you. These forms of advocacy in which the customer receives very little or no value should be limited to only after you've helped the customer achieve their goals.

Think of it like a staircase, and a referral is the top step. With the right strategy, we can offer the customer something in return for each act, making it a mutually beneficial journey the whole way up.

Next Steps: Distribution

Now that you have a group of amazing customers who have generated highly valuable UGC, what next? How do you get all this demand generation gold in front of the right people? An effective distribution plan is crucial to maximize the ROI of your content, so keep reading to learn recommended distribution channels, how they work, and which ones provide the biggest return.

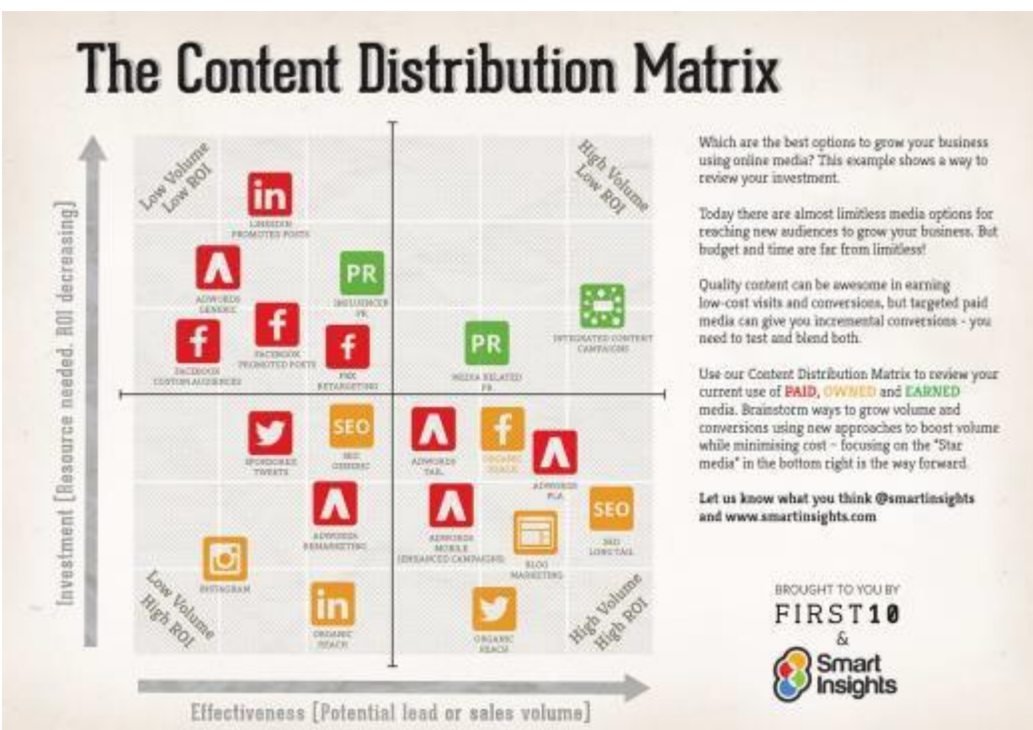
5 Ways to Distribute User-Generated Content (UGC) for Maximum ROI

Now that you've sourced a pool of amazing customers with stories to tell and have helped them create user-generated content (UGC) that's sure to attract a ton of highly qualified leads, next comes distribution. Often, though, we're so spent from creating that we don't take the steps to maximize the ROI of our UGC. It takes a little time, but with the right distribution plan your content can become a vital revenue driver.

In this post, we'll discuss the best owned channels to get your content in front of prospects, which ones are best for what audience, and how to arm your sales team with UGC to overcome common sales objections.

At the heart of that plan should be social media. LinkedIn, Twitter, and Facebook have more than [2.1 billion monthly active users](), so by focusing on the big three, you can be sure you're getting your content in front of the largest possible audience. Plus, social media is where we go to share what matters most to us from the people we admire, love, respect, etc. By focusing our UGC distribution efforts on social, we can speak to our customers and prospects as their peer. That's why at Upshot we've automated the sharing of UGC through your customer's social media accounts. This makes it easy to deliver content to the people who will get the most value out of it.

UGC Distribution Channels
The matrix below illustrates the effectiveness of the different types of paid, owned, and earned media for content distribution. For our purposes, we'll focus on a few of the largest ROI drivers for owned media, and show you exactly how to maximize the reach of your UGC.



source: *[http://www.smartinsights.com/content-management/content-marketing-strategy/content-distribution-matrix-infographic/]()*

LinkedIn
Instead of relying on the post-it-and-they-will-come mindset, use LinkedIn's targeted updates feature to speak directly to specific audiences just like you would in email. For example, you just finished a terrific piece of UGC that highlights the ROI of your product/service from the prospective of a customer in a specific industry. There's no reason to bombard your entire LinkedIn audience with content that doesn't speak to their use case. So, use the steps below to segment your audience based on industry, job function (whether your content speaks to the buyer or end user), and even company size.

1. Move your cursor over **Interests** at the top of your homepage and select **Companies**. You can then select the Company Page from the **Manage your pages** section on the right.
   - If you're in the new desktop experience, click the **Me** icon at the top of your LinkedIn homepage instead. You can then select the appropriate Company Page under Manage to access the new Company Page admin center.
   - You can also search for your Company Page through the **Search** bar at the top of the LinkedIn homepage.
2. If you're not taken to the new Company Page admin center automatically, click **View admin pages** or **Go to admin mode** at the top of the Company Page.
3. Click the **Updates** tab.
4. Select the **Updates** tab at the top of the page.
5. Enter your update into the **Share an article, photo, or update** box at the top of the page.
   - Click the **Image** icon in the bottom left corner to upload a photo.
   - Click the **Link** icon to add a video or Slideshare presentation.
6. Click the dropdown menu next to the **Share** button and select **Targeted audience**.
7. On the **Target audience settings** page, define the attributes for the audience you want to target:
   - Audience (you can target employees, non-employees, or both)
   - Languages
   - Geography
   - Job function
   - Industry
   - Company size
   - Seniority level
8. After choosing your settings, the targeting tool will automatically show you how many viewers are being targeted on the right side of the page. This **Estimated target audience** is the number of potential people who will see the update on both their LinkedIn homepage feed and on your Company Page.
   - If your settings created a narrow audience, try removing some targeting criteria to broaden your scope.
9. When you're ready to apply your settings, click **Save** and create view at the bottom of the page.
10. Click the **Share** button to post your update.

You can edit your targeting settings at any time by clicking the **... Menu** icon in the upper right of the posted update and selecting **Edit update**.

Remember, sharing the content is just the beginning. The goal is to engage, and engagement is basically just a fancy word we use for conversation. Respond to comments on your post and reach out to those who share it to find out what they liked most. That will not only help you refine your UGC in the future, but will also arm your sales team with the prospects' major pain point once they reach out.

Don't forget to repay the favor either. If someone shares your content, keep track of what else they share and like and if it meshes with your brand or industry goals, give them a boost by sharing their posts and updates.

Twitter

Twitter may have started out as a megaphone, but it's current iteration is a public forum for discussion. And it is ripe for B2B marketing. Think about your buyer's journey: They have a need so they begin researching possible fixes—they Google the problem, ask their peers, and seek out reviews. Twitter is the original review site. Every great experience as well as every poor one gets blasted out for the world to see. So why not insert the voice of your customer into the conversation?

According to Moz, the prime lifetime of a tweet is only 18 minutes. That's why Upshot automatically shares your UGC through the customer's linked Twitter account three times over three days. To maintain the authenticity of the sentiments, we recommend retweeting your customer's tweets. This puts a little distance between your company and the content and upholds the credibility of their story.

Also, search for influencers in your industry and make note of the hashtags they use. This will allow you to piggyback on their reach while offering valuable content to a wider audience.

Facebook
B2B has largely ignored Facebook as a content distribution channel, but considering more than one billion people are active on Facebook every day, neglecting this social media behemoth could be a costly decision. Facebook is no longer *just* a place to share baby pictures and listicles, it's now the major source of news for nearly half of American adults.

Now, that doesn't mean Facebook is where you want to post your latest Gartner whitepaper or product announcements, but it is the perfect avenue for distributing UGC, especially if your customer sweet spot is SMB.

The best UGC puts the customer at the heart of the story, makes them the hero. These types of stories, human stories, work very well on Facebook. Plus, given that the peak times for Facebook traffic is mid-week between 1–4p.m. (see image below for best and worst times to post to social media), readers are already primed to click on a story that can both distract them from work while also giving them information on how to work smarter, be more productive.

In addition to LinkedIn and Twitter, Upshot now offers the ability for your customers to automate the sharing of their UGC on Facebook. Since Facebook has tightened the reigns on organic reach of company posts, by having the customer share their story the content has the ability to reach a much wider audience without any monetary boost. Plus, Upshot has a 100 percent satisfaction rate among customer contributors, so this is an opportunity for them to share a piece of content they're proud to have their name on.

If you decide to publish on Facebook often, check out Facebook Instant Articles. The interactive features, mobile-first design, and crazy fast loading times produce some pretty amazing engagement metrics. Here's a helpful post by Social Media Examiner to get you started.

Facebook:

- Traffic is highest between 9 a.m. and 4 p.m. ET
- Best time to post is between 1 p.m. and 4 p.m. ET
- Worst time to post is between 8 p.m. and 8 a.m. ET

Twitter:

- Traffic peaks after 11 a.m. ET
- Best time to post is Monday-Thursday between 1 p.m. and 3 p.m.
- Worst time to post is between 8 p.m. to 9 a.m.

LinkedIn:

- Traffic builds before or after business hours
- Best time to post is between 7 a.m. to 9 a.m. ET or 5 p.m. to 6 p.m. ET
- Worst time to post is between 10 p.m. to 6 a.m. ET

source: http://www.ripleypr.com/blog/b2b-social-media-best-times-to-post/

Email

Email has a median ROI of 122%—more than four times higher than social media, direct mail and paid search. The only caveat—and this is why we recommend social as the best channel for UGC—you can only reach folks who have had some sort of interaction with your business already. So, for brand awareness, email isn't the best play, but it is perfect for nurturing leads down your sales funnel.

Like with targeted LinkedIn updates, it's better to segment your email newsletters and content distribution based on maximum impact. Also try A/B testing content to determine which piece produces better open, click-through rates (CTR), and conversion.

Sales Enablement

Want to know the true value of a piece of UGC? Ask your sales team. They encounter sales objections daily, and if you offer them a single source to quickly grab content that overcomes these objects written in the voice of your happiest customers, not only will you be their hero, you'll also get a better bead on which content is more useful in the field.

If you have a weekly or monthly sales newsletter, highlight your latest UGC and encourage your sales team to share through their personal social media accounts. Also point them to where they can download a hard copy to reference during face-to-face meetings, and ask for their feedback.

We don't want to keep producing content just for the sake of meeting content quotas, so keep your sales team engaged and poll them to see which piece they use the most, ask them what they're hearing in the field, and then tweak your content production based on their input. By giving sales the content they need to close deals, they will be more willing to nominate customers with great stories for your next piece of UGC.

Repurposing UGC

The best part about UGC is it comes jam packed full of content that can be repurposed for short testimonials, customer quotes, SlideShare presentations, and other value-proposition validating material. Be sure, however, to link back to the original source so your audience can go deeper in the story. For Upshot customers, linking back to the original content hosted on our site offers third-party validation and an extra boost of credibility to your customer's words.

Conclusion

We've looked at five different channels to maximize the ROI of your UGC and discussed how repurposing can lead to even more lead-generating assets. Consider this as a framework to reach your audience, but remember the key component of UGC when implementing your distribution plan—add value first, sell later.

The main goal in distributing any piece of content is to think about why it will be useful for your audience, and then decide what channel offers the best opportunity to get it in front of the people who need it most. When we take our content *to* the audience, rather than trying to pull them into our blog or website, we provide value with a low barrier to entry, and at the end of the day, that's exactly what UGC is all about.

Buy-In Email Template for Sales, CS, and Marketing Teams

Hi team,

Some of you may have heard that we're working with Upshot on a new way to capture customer success stories. Upshot helps us produce user-generated content told through the voice of our customers. Think of it like a reference call on a page.

But this isn't just another case study. These new customer stories put our customer first—they shine a spotlight on their professional achievements. They are the hero of the story, and we are the tool they use to succeed. Sounds great, right? All we need now are customers to spotlight.

How to Identify a Customer to Spotlight:

- **Vocal advocates.** We want people who aren't afraid to tell the world about their success and are hungry for the opportunity to elevate their professional status.
- **Innovative use cases.** Did a customer figure out a new way to use our product? Help them share their learnings with their peers.
- **Promotions or awards.** Have a customer who was recently promoted or received an award? Upshot stories can help them develop their thought-leadership and highlight how great they are at their job.
- **Success metrics.** Everyone loves big numbers, and behind every number is an interesting story. Look out for customers who share success metrics, and let's give them a platform to brag about their accomplishments.

What's in It for You:

- Combat common sales objections at every stage of the funnel with credible, authentic third-party content.
- Reward customers and strengthen relationships by giving them high-quality thought-leadership content they can use to showcase their expertise.
- Increase your social selling power with engaging first-person success stories.

If you have any questions about Upshot or would like to nominate a customer for an Upshot story, please let me know.

[Your name]

Vendor Fact-Check Guidelines

The fact-check review is a vital step in the Upshot process. It ensures your products and services are represented accurately and provides you with the opportunity to support your SEO strategy with backlinks as well as guide readers to relevant content on your corporate site. To help you navigate this process, and to maintain the integrity of your customer's personal story, here are a few guidelines:

What to look for:

- Company name, products, and services spelled correctly.
- Are your products and services represented accurately (are the features listed available to the public)?
- Would you like to add links? (You can add as many links to product pages, case studies, etc. as you'd like, wherever you'd like.)

What cannot be altered:

- Voice, tone, word choice, and sentence structure—as these are your customer's words and as such they should remain intact.
- Grammar and punctuation: Many of your customers have an established writing style that may fall outside of your normal marketing style, and may deviate from traditional style books (AP, Chicago, etc.). However, being that Upshot stories are ghostwritten for your customer, we match their existing writing style and formatting—idiosyncrasies included—to ensure that when consumed alongside their existing library of content, their Upshot story does not stand out as noticeably ghostwritten.

If you have any questions or concerns during the fact-check process, please do not hesitate to contact the Upshot editorial department at Jacob@tryupshot.com.