



Join our **Updox Advocate Customer Reference Program** and share your successes with our solutions, products and services

**We want to hear how you are using Updox solutions in your healthcare business and share those use cases with prospects and current customers.**

***Q: What is the Updox Advocate Program?***

A: When making any purchasing decisions, it's helpful to hear directly from current users. The Updox Advocate customer reference program offers a streamlined approach to this process, allowing current and prospective customers provide opinions and use cases on how Updox services and solutions benefit their businesses and help them serve patients faster, better and more efficiently.

The Updox Advocate program encourages interaction between current and prospective clients. Customers can extend their partnership with Updox by participating in a variety of Advocate Opportunities.

***Q: What is an Advocate Opportunity?***

A: An Advocate Opportunity is the process through which Updox customers share their stories with current or prospective clients. This can be in the form of a telephone conversation, a Web conference, an on-site meeting with an individual client, or a larger on-site meeting or forum with representation from multiple organizations.

***Q: How do customers participate in an Advocate Opportunity?***

A: We'll work with you to see where you are most comfortable participating. With your input and approval – we will match appropriate participants based on the specific request received. Typically, participants include healthcare providers, medical office/pharmacy staff, technology partners, supply chain partners and other out-of-hospital providers.

***Q: What should customers share?***

A: As a guideline, reference customers should be prepared to share their experiences with the following:

- Selection Process
- Updox as a Partner
- Implementation and Onboarding
- Solution Design / Workflow - Lessons Learned
- Best Practices/ Successes
- Value / Benefits Realized
- Future Vision
- Return on Investment
- Use Cases

**Q: How do customers earn Advocate Points?**

A: Advocate Points are determined by event type and aligned with event scope and level of participation. Anyone in the organization can join and Advocate Points can be redeemed individually or pooled across the business. Typically, Reference Points fall within these ranges:

# of Points	Event Type	Definition
100	Reference Call	Customer serves as a reference contact for a prospect, either via phone call or email exchange
100	Written Testimonial/Quote	Customer submits a written testimonial or quote, to be used in Marketing collateral
250	Use Case Story	Customer participates in a phone interview where content for a written use case story is gathered. Points are awarded when customer approves the story that is then used in Marketing collateral.
500	Webinar Speaker	Customer participates, on Updox's behalf, as a guest speaker in a webinar
1000	Site Visit	Customer hosts a prospect onsite at their agency, providing information regarding their solution and how it has impacted their business processes
1000	Tradeshaw Speaker	Customer participates, on Updox's behalf, as a guest speaker at a tradeshow/conference
2000	Written & Video Case Study	Customer participates in a written and video case study
2000	Open House	Customer hosts multiple prospects (minimum of 3 different agencies) in an Open House setting, providing information regarding their solution and how it has impacted their business processes

**Q: How are Advocate Points tracked?**

A: The Updox Marketing Department will track the Reference Points. Points are tracked and reported by using the tabs included in this spreadsheet. For all Advocate Opportunities, the following information will be collected:

- Date
- Prospect Business Name
- Prospect Contact Information
- Solution Areas of Interest
- Reference Contact Information
- Event Type
- Results (If Applicable)
- Comments/Notes

**Q: How do customers redeem Advocate Points?**

A: Advocate Points can be redeemed for Updox swag, Amazon gift cards, featured items (such as laptops, tablets, Littmann stethoscopes, etc.). Every 500 points equals \$100 value. Points can be redeemed by contacting Aisling Babbitt, director of Communications, at [ababbitt@updox.com](mailto:ababbitt@updox.com).

**Q: How do I join the Updox Advocate program?**

A: Get started by contacting Aisling Babbitt, director of Communications, at [ababbitt@updox.com](mailto:ababbitt@updox.com). This is a free program and there is no minimum requirement to participate in the program.