

Friendly Reminders:

- To submit a reference request, your opportunity should be in the **Negotiation** stage
- We require **2 full business days minimum to source a customer reference, but please keep in mind that this process can take longer.** We do everything we can to make tight deadlines but please understand that we do not keep any customers "on retainer." Every request requires email outreach and sign-off from our customers before we can make introductions.
- When filling out an RFP that requires customer contacts, we recommend letting your prospect know that we are happy to arrange reference calls if we are a finalist in their DAM search. A great way to frame this is to let your prospect know we value every customer's privacy and time and don't give out contact information without their consent.
- While we always try to match your prospect with a customer that matches their industry, company size and use case, a reference at its core should be that final piece of positive validation that our product works. If your prospect is looking for specifics (i.e. customers with XYZ integrations) reach out to the community team via Slack first to ensure this is possible before promising it to your prospect.
- Please try to keep your reference requests to 1-2 customers max (when needed), but let the community team know if and why more are needed.
- After the community team makes the initial introduction via email between the customer and you, please remember to follow up as you would with any other email. We often find that a secondary nudge helps move the reference process along! Not sure what to say? No problem, we've included some examples for you below!

AE Follow-Up Examples:

- **Example 1:**

"Hi [CUSTOMER NAME],

I hope you're having a great week! I wanted to follow up and see if you'd be willing to be a reference for [YOUR PROSPECT COMPANY NAME]. I know it would mean a lot to them, and we'd appreciate any help you can provide.

Thank you so much,

[YOUR NAME]"

- **Example 2:**

"Thanks, MacKenzie, and nice to meet you, [CUSTOMER NAME]. I wanted to follow up to see if you'd be willing to chat with my prospect about your Brandfolder experience.

Thanks in advance for your consideration and warm regards!

[YOUR NAME]"