

PosiGen + Ambassador

How Referral Marketing Eliminated Inefficiencies and Drove Nearly Half of Sales Each Month



When PosiGen, a fast-growing solar energy provider, came to Ambassador at the end of 2015, referrals were already driving a steady flow of new business, but tracking and managing them was cumbersome and the process wasn't scalable. Less than a year later, Ambassador's referral marketing technology has changed everything.



BY THE NUMBERS

A Closer Look at PosiGen's Success Story

50%

Percentage of new sales generated by referrals each month

9+ HOURS

Saves +9 hours/week by automating referral marketing with Ambassador

1 HOURS

Time it now takes to track and manage referral activities



With Ambassador, I've cut the time it takes me to track, manage, and fulfill referrals by an order of 10. And, as we've grown, the platform has grown alongside us. The impact it's had on simplifying the entire process for us — and our customers — has been incredible.

Caitlin Fitzgerald, Sales Operations, PosiGen



THE COMPANY

When solar energy provider PosiGen was founded in 2011, the company's leaders knew that word-of-mouth would be critical to success. After all, selling residential solar systems that cost upwards of \$30,000 isn't easy. The more warm leads the business can get via referrals, the better.

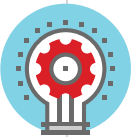
The good news: Right out of the gates, PosiGen was generating a healthy number of referrals. The bad news: As the company grew, tracking and managing them manually became an operational nightmare.



THE CHALLENGE

"When I took over the referral program, it was basically a spreadsheet," says Caitlin Fitzgerald, a Sales Operations Associate with PosiGen. "That works with a small customer base, but it's still not optimal."

In 2015, Fitzgerald and PosiGen's IT team began working to automate certain aspects of the company's referral program (including setting up referral tracking in Salesforce), but even that required several tedious manual steps. "I spent an enormous amount of time keeping track of gift cards, mailing envelopes, and manually tracking data. It was painful for us and it wasn't exactly the cleanest experience for our customers."



OUR SOLUTION

By the end of 2015, PosiGen had decided to shop around for a software platform that could remove all of that friction and fully automate its referral systems. When Fitzgerald found Ambassador, she was drawn to a few key features:

- Direct integration with Salesforce through its AppExchange
- Flexibility to scale and grow the platform alongside the business
- Automated payouts directly through the platform's portal

The latter was particularly appealing because it eliminated the need for Fitzgerald to track and send physical gift cards. "If you've ever run a referral program, you know that paying out incentives on time and to the right person can be incredibly difficult," Fitzgerald says. "With Ambassador, we've gone from spending an enormous amount of time on fulfillment to clicking a few buttons and being done."



THE RESULTS

Today, PosiGen generates a huge portion of their new business through referrals. Fitzgerald has also cut the amount of time she spends managing the referral program from over 10 hours a week to less than half a day.

"It's removed so much friction for us and our customers," Fitzgerald says. "Our customers actually enjoy using the program now and we've been freed up to spend our time on more valuable activities — like analyzing results in the dashboard and trying to find new ways to amplify the volume of referrals coming in."