



CLIENT

Engineers Australia



INDUSTRY

Member Association

PROGRAM

Customer Referral Program

## How Engineers Australia Launched Their Automated Referral Program in 8 days

### The Situation

Engineers Australia is the largest and most diverse body of engineers in Australia. As Australia's principal engineering association they serve and represent around 100,000 professionals at every level, across all fields of practice. They were running a campaign and needed to quickly create and launch their referral program. With such a large membership base, everything needed to be fully automated and integrated with their existing systems and customers channels.

"Our overall experience has been amazing. From the moment that we indicated we were interested, we have been pleasantly surprised by the platform and the customer service. I have worked with many platforms with customer service centres outside of Australia and **this is the best experience we have ever experienced.**"

- Sarah McGregor, National Manager - Digital Marketing

### Getting Started

	Engineers Australia's Challenges	Referral Rock's Service
<b>Kickoff Call (Day 1)</b>	<p>Needed an <b>automated referral marketing platform</b> to deliver an effective promotional campaign for their membership.</p> <p><b>Get up and running within 2 weeks.</b></p>	<p><b>Immediate introduction</b> made to Jake, a Customer Success Manager at Referral Rock, and <b>Kickoff Call scheduled.</b></p> <p>On Kickoff Call, EA walked Jake through their ideal workflow. Jake confirmed how we would set up their workflow in Referral Rock by:</p> <ol style="list-style-type: none"> <li>1) Providing feedback and suggestions on <b>how best to implement their workflow</b></li> <li>2) <b>Identifying key integrations points</b> and recommending the <b>most efficient integration method</b></li> <li>3) Providing <b>resources with best practices</b> for rewards, messaging, and other components of the program</li> </ol> <p>Discussed <b>timeline and scheduled the next two calls:</b></p> <ol style="list-style-type: none"> <li>1) Messaging and Design</li> <li>2) Automation/Implementation</li> </ol>



# Successful Onboarding:

	Engineers Australia's Challenges	Referral Rock's Service
<p><b>Messaging &amp; Design (Day 5)</b></p>	<p>EA needed a seamless, <b>easy experience for their members and referrals</b> to ensure an <b>effective launch</b> and adoption of the program.</p> <p>As the referral program was completely new, EA had questions regarding <b>best practices for reward structure and messaging</b>.</p> <p>EA asked for assistance on how best to <b>promote the program</b>.</p>	<p>Jake helped EA embed the referral program into EA's existing experience and communication channels for their members. They set up <b>one click access</b> buttons in <b>EA's marketing emails</b>. This enabled EA to <b>promote the referral</b> program through their existing newsletter and email channels.</p> <p>Branding was important to EA, so Jake helped them create a <b>white labelled version of the member portal</b>.</p> <p>Jake <b>assessed the program's copy and design</b>, personalizing his feedback with actionable suggestions and examples of best practices.</p>
<p><b>Automate &amp; Integrate (Day 6)</b></p>	<p>The primary integration were the connections between their <b>Salesforce CRM</b> and Referral Rock.</p> <p>EA needed the program to follow Australian regulations by <b>keeping referrals anonymous</b> to Referral Rock.</p> <p>EA's outsourced remote <b>development team needed support</b>.</p>	<p>Jake helped EA and their remote development team setup the two direct <b>Salesforce integrations</b>: Referral Add and Referral Update.</p> <p>Jake <b>reviewed the integration over a screen share</b>, providing resources and recommendations for a fast implementation.</p> <p>Jake helped EA <b>privatize their referral data</b> using anonymous IDs from Salesforce.</p> <p>Together, we <b>automated referral promotion</b> by triggering an automated invitation <b>email from Salesforce</b> based on certain criteria.</p>
<p><b>Test &amp; Launch (Day 8)</b></p>	<p>EA needed a <b>secure environment</b> to test integrations and program flow prior to public launch.</p> <p>EA wanted to <b>launch successfully</b> with best practices.</p> <p><b>Last minute launch issues</b> from remote development team.</p>	<p>Jake provided <b>sandbox account for testing purposes</b> and helped migrate the sandbox program to the main account for launch.</p> <p>Jake and EA completed a screenshare to <b>review and test the program</b>. They <b>developed a launch timeline</b> of key activities to ensure a smooth launch.</p> <p>Jake <b>worked across time zones</b> to help debug and fix last minute integrations in order to <b>meet the launch deadline</b>.</p>
<p><b>Support &amp; Optimize (Ongoing)</b></p>	<p>EA needs to continue demonstrating the <b>viability and success</b> of program to internal stakeholders.</p> <p>As Referral Rock's product develops, EA needs to be <b>educated on relevant new features</b> and ensure they are properly <b>incorporated into their program</b>.</p>	<p>Jake helped EA set goals for the campaign based on identifying specific metrics and appropriate benchmarks.</p> <p>Jake and the team <b>monitor the program's statistics</b>, helping EA <b>analyze performance and optimize</b> the program based on the results.</p> <p><b>Quarterly audits</b> are scheduled for the future to do a deeper program review but EA can always reach out with questions.</p> <p>Jake will continue to update and help the EA team <b>put new features in place</b> and improve their program.</p>