

Partner How-To: Increase integration adoption & usage

INTRODUCTION

Welcome to the Partner How-To series! This guide is dedicated to helping you not only launch your Procore integration but also to drive its widespread adoption and consistent usage among our mutual customers.

Optimize Your Marketplace Listing for Adoption

The Procore Marketplace is a primary resource for customers seeking new technology solutions. A clear, informative listing smooths the path for customers deciding to connect.

- + **Essential Info:** Clearly state how it works, Procore tool needs, and the ROI of the *integrated* solution.
- + **Build Trust:** Strengthen customer confidence by including an integration map in your listing and completing the Security & Compliance section to highlight your app's safety and reliability.
- + **Ease of Use:** Briefly note setup ease or link to a setup guide. Keep it current.

Drive Adoption throughout the Customer Lifecycle

Proactively engage customers at key touchpoints.

Seamless Onboarding:

- + Ensure Procore integration setup is a standard part of every new customer's onboarding.
- + Provide concise training materials (guides, short videos) and clear implementation support.

Ongoing Customer Success:

- + **Quarterly Business Reviews (QBRs)/Check-ins:** Review integration usage, demonstrate value, share best practices, and solicit feedback.
- + **Showcase Value:** Share success stories of integrated customers.
- + **Proactive Engagement:** Use in-app messages or usage data (if available) to prompt further engagement or offer targeted help.

Enable Your Teams:

- + Train your sales team on the integration's value and benefits.
- + Equip your support team to efficiently handle integration-specific inquiries.

Targeted Outreach with Crossbeam (Select & Premier Partners)

Use data to find adoption opportunities.

- + **Identify Prospects:** Premier and Select partners can use Crossbeam to find shared customers not yet using the integration. Foundation partners can access the number of shared accounts and use that to better understand the size of opportunity.
- + **Tailored Campaigns:** Premier and Select partners can coordinate with Procore to potentially reach out to these customers, highlighting the specific benefits of activating the integration.

Gather Feedback & Iterate to Accelerate Usage

- + **Collect User Feedback:** Regularly ask for input via surveys, QBRs, or support channels.
- + **Analyze & Improve:** Use feedback and usage data to enhance your integration.
- + **Communicate Updates:** Inform users of improvements and update your Marketplace listing and training materials.

By following the guidelines in this document, you can effectively increase integration adoption and usage through optimized listings, proactive customer engagement, and continuous improvement. For any questions or support, please contact techpartners@procore.com.