Workshop Description

There are a myriad of activities involved in launching and cultivating a sustainable customer reference program (CRP). The list of goals and tasks can be overwhelming and unfocused. To identify and prioritize the activities that will affect meaningful, high impact change, it helps to leverage outside perspective coupled with program expertise armed with best practices. Point of Reference employs a proprietary assessment tool and methodology for synthesizing your current state and practices, and program goals into an actionable roadmap for you and your team. This is accomplished through a highly collaborative, one-day workshop with one of our program experts.

Customer Reference Program Evolution Workshop

Who Should Attend?

- The manager responsible for the program on a daily basis
- Other program team members, time permitting, will find the workshop benefit as well.
- Key program stakeholders such as managers from Sales, PR, AR, IR, the RFP team, and relevant executives (typically marketing and sales)

Workshop Materials

- Customer Reference Program Maturity Model tool
- Other Point of Reference templates and tools relevant to discussions

Sample Agenda

We often modify the workshop design based on what we know in advance of the workshop so that ultimately no two workshops are exactly the same. The following is a format we start from:

- 8:30 – 10:00 | Maturity Model self-assessment, review & discussion
- 10:00 – 11:00 | Review current program scope, services, assets, collateral, systems
- 11:00 – 12:00 | 15-minute stakeholder meetings (4)
- 12:00 – 12:30 | Working lunch
- 12:30 – 1:30 | 15-minute stakeholder meetings (4, if needed)
- 1:30 – 2:00 | Stakeholder meetings, review/recap
- 2:00 – 4:00 | Maturity Model deep dive
- 4:00 – 4:30 | Wrap up

Workshop Goals

- A full understanding of current reference practices, assets, and objectives
- Inventory expectations and goals for the program (program and executive perspectives)
- Identify all factors that will help/hinder achievement of goals
- Program Assessment Summary & Roadmap (within 1 week of workshop date)

Cost

$2,500 USD + travel and expenses.

Scheduling

Minimum lead time required: 2 weeks

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