



BEST PRACTICES TO MAXIMIZE USER ADOPTION OF Customer Advocate Programs

MAXIMIZING ADOPTION

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- ▶ The adoption goals of customer advocate programs are no different from what Marketing strives for in general: **market penetration** and **wallet share**.

For customer advocate programs these generalized goals translate into the following metrics:

- The percentage of all reference activity occurring with the program's knowledge or assistance
- The percentage of opportunities that leverage customer advocates and/or content
- The value of all opportunities that make use of program assets (contacts or content)

For the last decade, we have evaluated programs within companies of different sizes, staff sizes and structures, and industry segments. Across this spectrum of B2B organizations and degrees of program success, patterns emerge. From the analysis of both success and failure, we offer these best practices for companies just starting a program, as well as those with long-standing programs looking for fresh perspective.

1. SELECT THE RIGHT LEADERSHIP

The importance of having the right person leading the program from a personality, experience, and skill set perspective cannot be underestimated. At the end of the day, the right resource match makes all the difference in the quest for user adoption.



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This may be more difficult than you think. A customer advocate program manager needs big picture vision and the ability to execute on a tactical level. Relationship building and communication skills are used both internally and with customers.

The right technology can automate many tactical aspects of a program such as identifying new program candidates, maintaining current data, and facilitating reference requests. However, a truly vital program requires sufficient management bandwidth to keep improving and ratcheting up quantifiable impact. The leader cannot be expected to run an effective program if they are asked to manage 2, 3 or 4 more functions, especially if not complementary.

2. CREATE A PROGRAM ADVISORY BOARD

The largest stakeholder group is typically Sales, but we recommend you establish an advisory board representing Customer Success/Account Management, Marketing, Social Media and other relevant groups. Creating a channel for regular feedback is imperative. Have managers nominate 10-12 board members and hold recurring meetings to solicit their input aimed at ensuring that the program supports their needs and is delivering on its promise. We have plenty of advice concerning the attributes of a good board member. The best candidates for this type of advisory committee are opinionated and vocal, yet good corporate citizens (not lone rangers), and who also appreciate the value of customer advocates. These people are the most likely to provide honest, thoughtful and constructive insights.

3. DEFINE & COMMUNICATE YOUR SERVICES

Users must know what they can expect from your program before they use it. Address these early and often:

- The stakeholder groups supported, for example, Sales, Marketing, Social Media, Investor Relations, and PR.
- The program's functional scope (e.g., reference matching, customer content, advisory boards, customer awards, etc.).
- Your service level agreement commitment is to stakeholders.
- How success is measured.

4. PERSONIFY THE PROGRAM

Customer advocacy is a relationship-centric function. Customer relationships are essential of course, but a close second are stakeholder relationships. Relationships are between people. Ensure your program has a face. The people who power the program should be visible and familiar to the users. Why does it matter? When you know the people personally you are more willing to:

▶ **Participate** -
feel like part of a team effort where everyone's effort counts

▶ **Cooperate** -
make an effort to change process/behavior

▶ **Respond** -
versus ignore a request from some anonymous requester



5. ENLIST LEADERSHIP SUPPORT

Advocate programs usually corral disparate, chaotic, and sometimes dysfunctional processes. They provide structure to improve the use of customer advocates to drive revenue and prevent overuse. You would think these obvious benefits would make change easy. That is not the case. Changing how salespeople, in particular, perform

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their work, and that includes learning a new system, is challenging. Vocal, visible support from top leadership makes all the difference in accomplishing the change management that is necessary. Executive support may be in the form of funding incentive plans (carrots) or simple enforcement (sticks). Often, it is a combination of these, administered via ample and creative communications, that are most effective. The key is to have the support in place

before the program rolls out. Without executive endorsement and enforcement, program adoption will be haphazard, and adoption rates will lag.

6. GENERATE AWARENESS & PROMOTION

Short attention spans, competing interests, and turnover make continuous program promotion a necessity. The larger and more geographically distributed a company is, the greater the need for formalized communications.

- Keep the program's activities and team members visible to internal users through Sales calls, kick-off meetings, Chatter (Slack, Jive, etc.), email newsletters, lunch & learn events, regional office visits, ride-alongs, and publication of program dashboards.
- Create and maintain a promotion plan/calendar for the advocate program just like external Marketing programs.
- Promote user success stories. Who better to explain the value of the program than employees who have benefited? Publicizing those user stories will educate, enlighten, and encourage the un-acclimated users.
- Get to know new users through new-hire training. Catch them when they are new to the company and you'll have them for life.

7. BE AN INTERNAL CONSULTANT

There are a lot of tactical parts to running an advocate program, and it is easy to get bogged down in the day-to-day minutia and become a reactive production line, which has low potential. The program leaders that proactively meet with consumers

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One of the best ways to influence the influencers is to act as a Customer Advocate Consultant. What does this Customer Advocate Consultant do? They continuously seek out ways to incorporate customer perspectives and experiences in any forum or channel that influences buyers, analysts, partners, investors, and employees. The Customer Advocate Consultant becomes a natural participant in strategic activities. This consultant

also promotes the available customer advocate resources and educates internal stakeholders on how to leverage the resources for their own benefit.



CONCLUSION

This is an exciting time to be leading a customer advocate program. Peers have become the #1 influence on B2B purchase decisions; above analysts and traditional vendor marketing. The value of the referenceable customer is now acknowledged, and customer advocate programs should be the core of advocate information, content, and activity.

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As you may have surmised, while not rocket science, a certain amount of focus and bandwidth is required to reach a high level of adoption. The big picture is also important. In that respect, executive support should be at the top of your priority list to gain the necessary resources and budget allocation. Sales leadership should make it crystal clear why using advocate program's resources is not optional. If salespeople are not savvy enough to use customer advocates in nearly every deal, then the organization needs to explain how customer

advocates support company growth goals. When your program's services become a dependency for other departments' business goal achievement, the support grows. It is a virtuous cycle.



Since 2003, Point of Reference has been helping companies leverage customer advocates to fuel business growth and fortify brands. With complete perspective and proven execution, we integrate scalable technology, content and supplemental staffing solutions that organize and optimize authentic customer voices. By combining decades of industry expertise along with business-to-business customer reference management solutions, Point of Reference helps its clients orchestrate coordinated reference activities, inject relevant customer references and related content at the critical time in a sales cycle.

8050 E. 24th Avenue, Denver, Colorado 80238
Inside U.S. 800.708.4857 | Outside U.S. +1 415.839.9983
www.point-of-reference.com | sales@point-of-reference.com

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