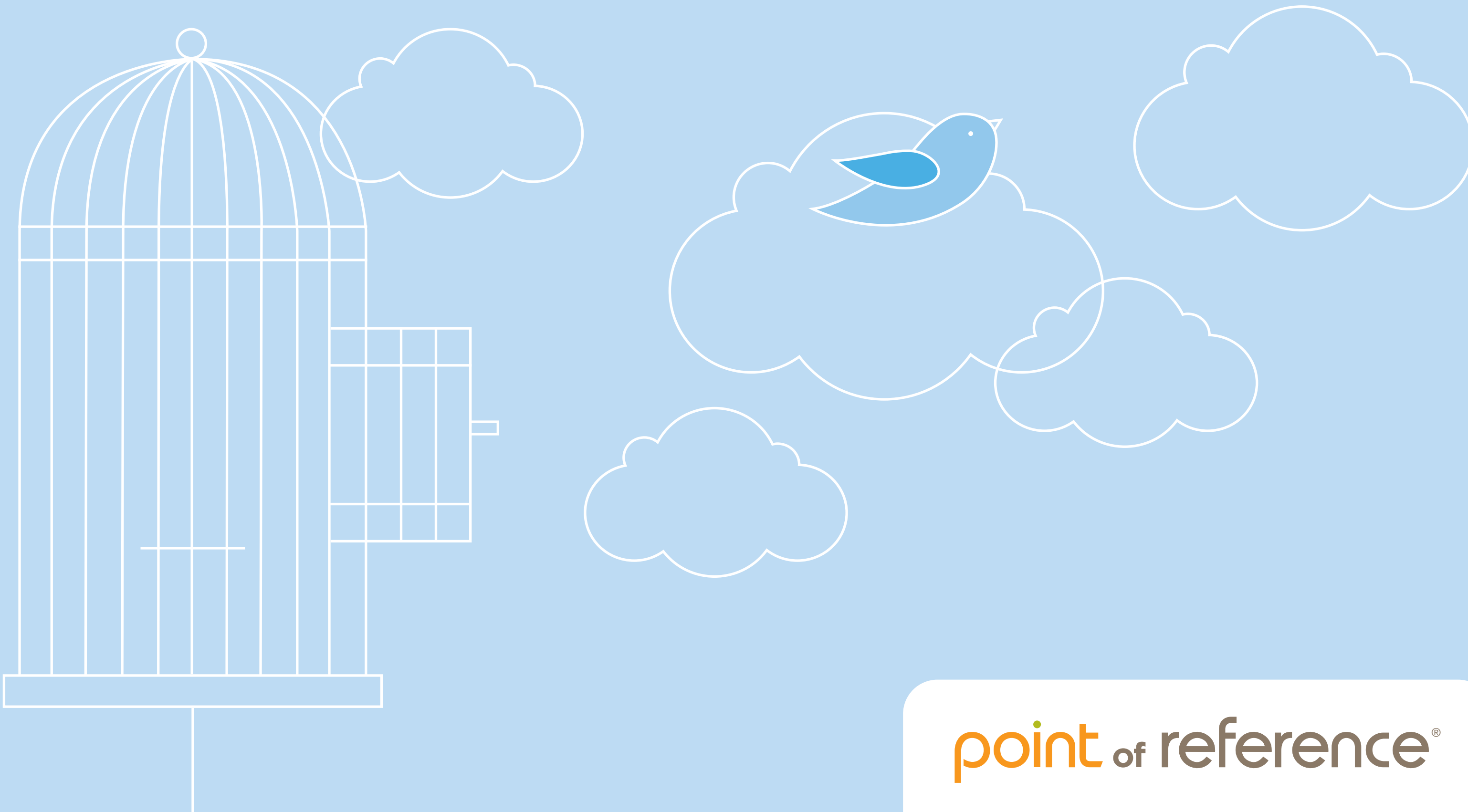
# Getting Your Customer Reference Program **Un**Stuck



point of reference®

**Is your customer reference program stuck in first gear churning out case studies and in a continuous, reactive scramble to support Sales?** You've seen the statistics and know customer references can play an essential role in a variety of key marketing and sales activities.

- Peer insight is in high demand by new buyers and existing customers. According to the SiriusDecisions 2019 B-to-B Buying Study, peer references sourced by the selling organization or by buyers on their own are among the most powerful decision drivers for C-level executives making a buying decision.

  Amy Bills—Sirius Decisions Research Brief: Showing Your CMO the Impact of Customer Advocacy

91

- 91% of respondents agree that marketing measurement and reporting is a top priority for their organization's investments.

  DemandGen Marketing Measurement and Attribution Survey Report

**So, how does your program get the respect it deserves?** This white paper provides best practices for maximizing the impact and value of your reference program and transforming its standing in the organization from invisible to indispensable.

## CHARACTERISTICS OF A STUCK PROGRAM

**First, let's look at the symptoms of a stuck program.**

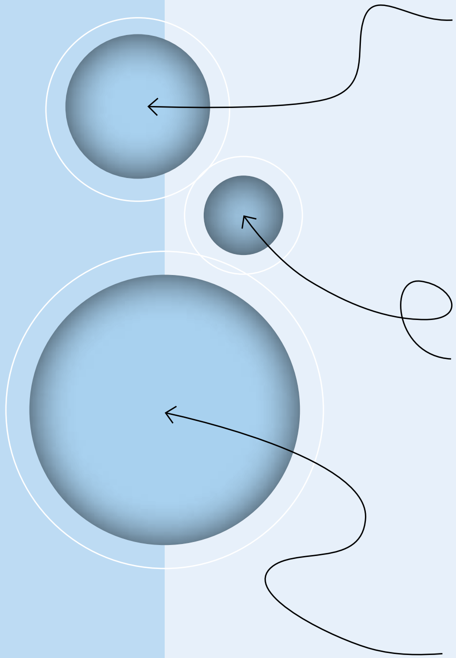
- **It's manual.** Stuck reference programs typically have many moving parts that are manual processes. Vital information is stored in people's heads, and the program relies on those memories to locate, track, record, and capture feedback related to various reference activities. This methodology is highly susceptible to human error and isn't the least bit scalable.

- **It's reactive.** Executing against a clear plan and dealing with fire drills just don't mix. Chronically reactive programs erase any hope of making a significant impact. They are not sustainable and exhausting mostly because there is no light at the end of the tunnel.

- **It's siloed.** When the customer reference function is isolated or discrete rather than part of a customer reference culture, it lacks strategic importance. The stark reality is that programs that can't demonstrate how they are contributing to the greater goals don't get funding. They are relegated to the "nice to have" instead of the "must have;" to the expense column rather than the revenue generating column.

## THREE BLACK HOLES

**We've identified three specific areas that truly are unnecessary black holes that gobble up program resources.**



1. **"Reference help desk" activities.** This encompasses the time spent assisting sales, marketing, events people, and execs who need a reference contact or content. Locating relevant references is an essential part of any reference program, but every request shouldn't need your personal attention, and requests shouldn't be difficult or time-consuming to fulfill.
2. **Opportunistic recruiting of customer advocates.** Recruiting happens by alternatively chasing salespeople/account managers and customer contacts in an effort to compile accurate and comprehensive reference information, often carried out with a "beggars can't be choosers" mindset.
3. **Reporting.** If the time spent running/requesting data exports, combing through data and data sources, formatting, and even distributing reports vastly outweighs time understanding and leveraging the information gleaned from the reports, you've got a problem. This tends to happen when information isn't centralized, tagged, and accessible.

## THREE BLACK HOLES

As you read our black holes short list, you might have thought **“Wait a minute, aren’t these fundamental functions I’m supposed to be spending time on?”** They do need to get done, but not at the expense of higher value program activities. The common denominator of these black hole activities is that for most stuck programs they typically require too much human intervention and are reactive and time-consuming.

If that’s how the bulk of program time is spent, you have a stuck program. The perception of a stuck program is that it is not essential, often flying under the C-suite radar, in spite of how hard you work. Stuck programs have a weak correlation to and modest impact on company objectives. These programs (and their staff) are underappreciated and face both budget and job insecurity.

### Managers who are stuck tend to give equal weight to all the “asks” and responsibilities that come their way.

Rather than being able to focus on priorities and executing on plans, stuck managers are only able to keep their heads just above water, treading as fast as they can. This is extremely frustrating, but worse, typically results in nothing of value getting accomplished because not enough concentrated and sustained effort is applied long enough to any initiative.

**TRAITS OF THE STUCK AND UNSTUCK MANAGERS**

## People who are **un**stuck do the opposite.

Successful executives are proficient at avoiding getting stuck by continually assessing demands on their time relative to big picture objectives. They focus on a handful of goals rather than all the other stuff vying for their attention. What's their secret? It's a combination of discipline and delegation.

Okay, so you may not have anyone to delegate to, but there are other ways. I know what you're thinking: "How do I get the executive support, and potentially budget, to free my time for the important stuff?" Automate and outsource whatever to can. Remember, if you're properly aligned with corporate goals, your success feeds directly into your leadership's success. So, they may be surprisingly willing to invest in technology and services that help you help them reach their goals. **Win-win.**

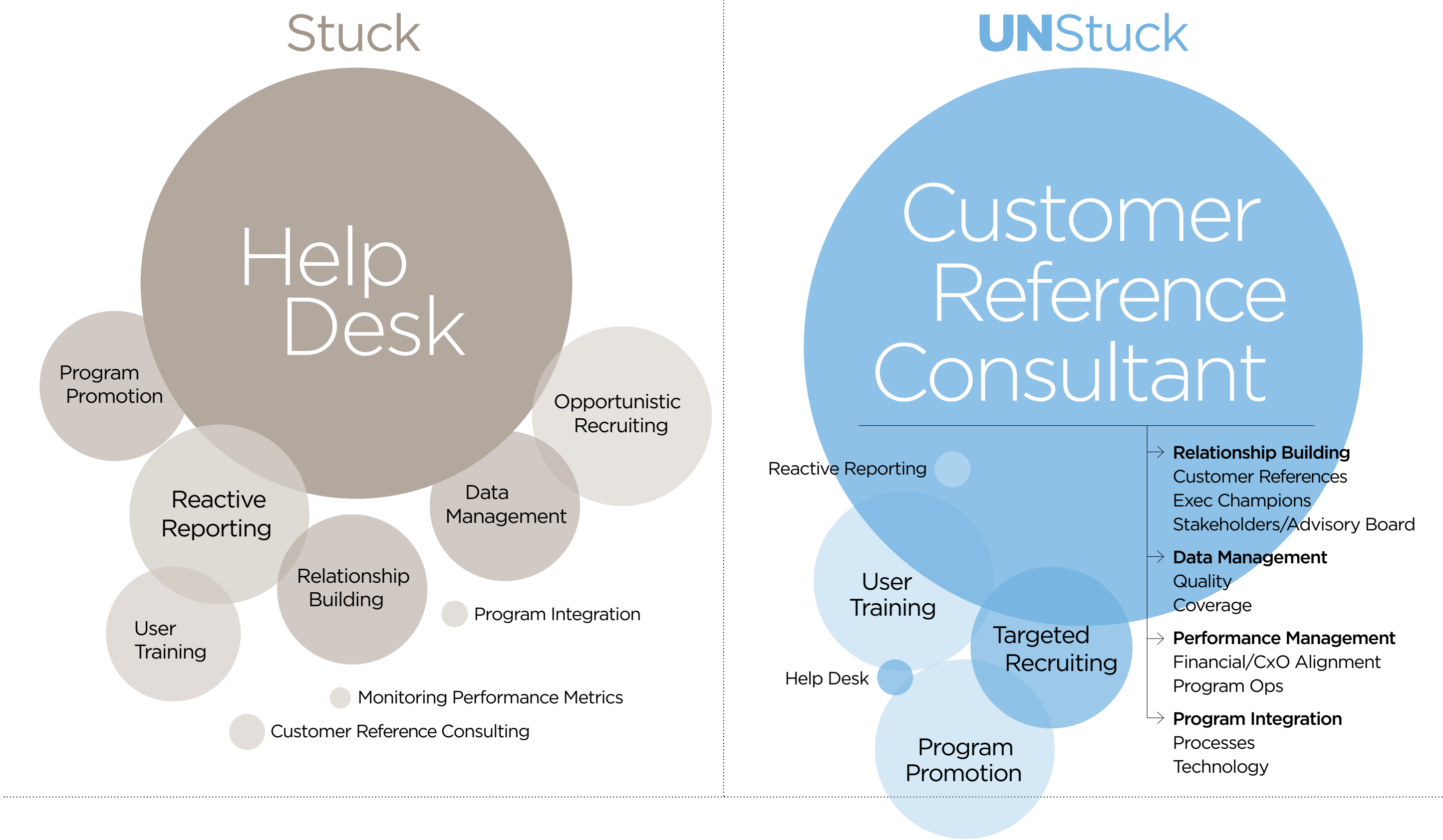
Successful managers spend **much more time on networking activities** with peers in other units and higher-ups throughout the organization."

Harvard Business School research

# Activity Breakdown

## Stuck vs. **UN**Stuck Customer Reference Programs

There are many parts to managing an reference program, and they all have to get done, one way or another. It is just a matter of prioritizing the high impact, strategic elements over the mundane, tactical tasks. The goal is to move from stuck to Unstuck. **Where is your program?**



## PROGRAM HACKS OF THE UNSTUCK

In the daily grind, it is all too easy to miss the proverbial forest for the trees. So how do you get unstuck, correlate practices to the broader needs of the program and corporate goals, focus on those priorities, and stop chasing your tail? Assess where you spend your time today and what can be handled (maybe more efficiently) by technology, through outsourcing, or with a creative and unconventional approach.

**Automation is most efficient when an organization leverages a purpose-built application such as ReferenceEdge℠, but a lot can be accomplished simply by capitalizing on the capabilities within your existing CRM solution.**

- Salesforce® and other CRM solutions make it easy to set up an alert to notify you when, for instance, there is a change in opportunity status, such as when a deal of a certain size closes. This is a simple way to build your pipeline of prospective reference candidates without constantly checking in with salespeople.
- A standardized nomination web form facilitates gathering consistent information with each submission versus email and phone. Creating an online nomination form and adding a button to an account or a contact page to access it is far better than taking notes from Sales meetings, ad hoc emails or phone conversations.

- Put your marketing automation tool (e.g., Marketo, Eloqua) to work for your program. Customer references can be recruited through campaigns, and response data can feed right into a nomination queue or reference database directly.
- There are certain times, like the end of a revenue cycle, where references are in high demand. This is a perfect time to invite a group of prospects to a reference teleconference (a.k.a. reference forum) featuring a single customer. This prevents overtaxing your most in-demand advocates while meeting Sale's needs.
- Partner with post-sales teams such as Customer Success and Account Management. These folks are closest to your customers and can be enlisted to identify advocates, contribute to reference data accuracy, and alert you to any service issues that might temporarily impact a customer's reference status.

It was critical for us to have a reference platform where updates to our customers' places of work were **seamlessly integrated** into the system and didn't require a big manual effort. This capability was crucial to save our team significant time and effort and ensure that the platform had our stakeholders' confidence.

Allyson Crowell, Blackbaud

## PROGRAM HACKS OF THE UNSTUCK

- Take advantage of human nature. People like to be acknowledged and are inspired by competition. Make your program fun. Games and prizes can go a long way in making your job easier both with internal stakeholders and customers. We're not suggesting paid endorsements, but you'd be surprised how much a little public acknowledgment can do for both internal adoption and customer participation.

- Cultivate program ambassadors. These are salespeople, marketers and post-sales colleagues who can be leveraged to tell the program's story and extend your reach. We recommend forming a program advisory board to promote, educate and solicit ongoing feedback from your end users.

- Leverage information on customer health or NPS scores to inform the reference status of your advocates. Automating this connection may yield more reference candidates or avoid the awkward situation where an unhappy customer is asked to be a reference.

- Optimize self-service options for reference searches, reference requests, and sharing customer content. There is a fine line between high touch and becoming a micro-managing bottleneck. Take the proverbial "teach a man to fish" vs. "give a man a fish" approach.

5

## FIVE FOCUSES

**We talk to sales enablement, sales management, and up to our CEO about the customer stories that are needed.** WHAT STORIES ARE WORKING IN TERMS OF THE BUSINESS, **what's working for sales, and what do we need to highlight to progress as a business this year.**

Daniel Palay, Elastic

**Focus on the activities that need you and your skill set.** The unstuck program manager is more strategic and has evolved into a customer reference consultant identifying the needs of stakeholders and executing plans that ensure they have what they need for their goals. We see five high impact areas.

1

**RELATIONSHIP BUILDING –** At the heart of a customer reference program are relationships, and those demand a human touch. There are a lot of relationships to build to create a successful reference program, and deep and sustained relationships with customers are essential. That's how you develop the best reference content and identify the right customers for each need. Equally important are internal relationships. Customer programs call for close collaboration across multiple departments and require executive champions to foster internal adoption. And remember to set up a feedback channel. such as an advisory board. to help you manage and refine your program for the changing sales and marketing environment.

We have a cross-functional working group that meets on a monthly basis to ensure our program is **functioning well** and address any challenges that may creep up.

Jessica Thomas, Benevity

5

2

**DATA MANAGEMENT** – Data quality is fundamental. It is the foundation of any program. Good data is a disciplined process, not a one-and-done project. Customers aren't static entities, so there is a continuous exercise to keep customer information current and comprehensive. And let's be honest, this isn't horseshoes —"close" isn't good enough. Either the data is right, or it is wrong.

**89%**

**of marketers recognize the importance of having customer data in making better decisions.**

Forrester Research

**Data, in and of itself, isn't useful.** Its impact is realized when the insights it holds are unlocked. And those insights are only valuable if the data is accurate, timely, and permissible to use in the desired manner.

Salesforce Research, *State of Marketing* report

5

3

**PERFORMANCE MANAGEMENT** – Establish the right goals and metrics from the start. Think like an executive. What are the key objectives and how can those be measured? Don't make things more complicated than necessary. In our experience, there are really only a few things that keep the C-suite up at night. They want straightforward snapshots of how the reference program is helping meet major goals. Sharing your success is important. It not only solidifies the value of your program for top management, but it also helps encourage participation for potentially wary internal customers from other departments.

There are quite a few levels of sales hierarchy, and **we want to make sure everybody is aligned** and understands our KPIs for the quarter and the program outcomes and how it's going to benefit their organization.

Kate Restaino, Samasara

**PROGRAM INTEGRATION** – No successful program is an island. You need to be aware of key initiatives throughout your company whether they are new product launches or forays into new industries or geographies. Customer reference programs serve many stakeholders, so you need to be mindful of the processes and protocols for working across different functions. Equally important is the data and technology integration and synergy. Many factors contribute to a customer health score, and that health score is particularly important to the reference program. So, connect your technology to related martech components and become part of the ecosystem.

Customer advocacy **touches all parts of the business**, not just sales, and marketing. Anybody in the company that has interaction with the customers, this program can relate to them or can be a part of their plans as well.

Wendi Wolfgram, A10 Networks

5

**ENGAGE YOUR C-SUITE** – The typical CxO has two or three overriding priorities. **That's it. Not six, not twelve, and certainly not 20**. Your program cannot afford to not contribute to the top three. Know your CxO's top priorities. What could be more important than that? Map your program's goals to those priorities. Virtually any major initiative can benefit from insights and experiences from your company's best advocates.

**Leadership loves seeing the increase in program adoption and the objective, hard data.** In essence, the program adoption equates to more opportunities to showcase our customer's success and our ability to QUICKLY MATCH OUR CUSTOMERS TO THE REFERENCE ACTIVITIES that are of interest to them.

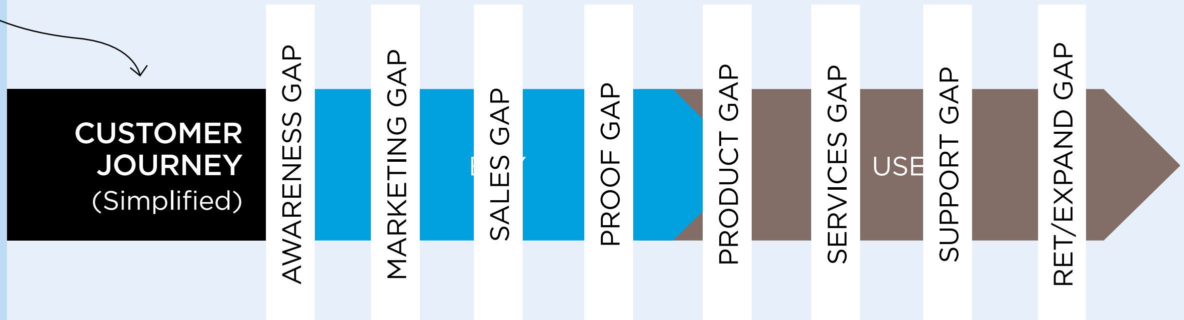
Sandi Montour, Mitel

## SUPPORTING THE JOURNEY

# One last point we want to drive home.

Customer reference programs are in a unique position to touch every facet of the customer journey.


Look at the custom journey continuum from early awareness by a prospect all the way through to customer retention and up- or cross-selling.




Between each phase is a transition; a gap over which your customer will either move forward or will not. If her journey stalls the customer is just as likely to step off the path, and you lose engagement.

Graphic courtesy of: *Advanced Practices in Customer Advocacy and Engagement,* Bill Lee, Center for Customer Engagement

## SUPPORTING THE JOURNEY

**IN THE B2B WORLD, practitioners of customer advocacy must persevere to earn attention and resources** from C-level executives. As these practitioners are focused on tactical metrics, they are often unable to connect the groundwork of customer advocacy to the achievement of business goals.

Amy Bills, Sirius Decisions Research Brief: Showing Your CMO the Impact of Customer Advocacy

Unstuck customer advocate programs have the ability to bridge every gap. **Figure out the specific ways the advocate program solves the needs of those managers whose job it is to ensure they stay on the path at a particular juncture.** Demonstrate how you do that to your executives and sales team, and you and your program become a crucial part of the business.

So, if you find your role or customer advocate program is stuck, making a few changes can get you off the proverbial hamster wheel. Employing a few of our suggestions will help you see the bigger picture, leverage technology, and focus your priorities to elevate your program from invisible to indispensable, and we're here to help.

When the **customer is successful** through [the buying] lifecycle, that engagement turns into ADVOCACY, which **extends your voice in the market** without having to spend the same time, manpower and money through traditional online and offline marketing approaches.

Laura Ramos – Forrester Research

**About Point-of-Reference**

Since 2003, Point of Reference has been powering B2B customer reference programs that fuel business growth and fortify brands. We believe advocates tell their customer experience stories better than anyone and increase our clients' odds of winning opportunities in the process. By combining decades of domain expertise with our purpose-built customer reference management technology, native to Salesforce CRM, Point of Reference allows companies to inject relevant customer references and related content at critical points in a sales cycle, attribute reference activities to revenue, and orchestrate coordinated reference activities that boost productivity. For more information, visit **www.point-of-reference.com**.



**www.point-of-reference.com** | **info@point-of-reference.com**