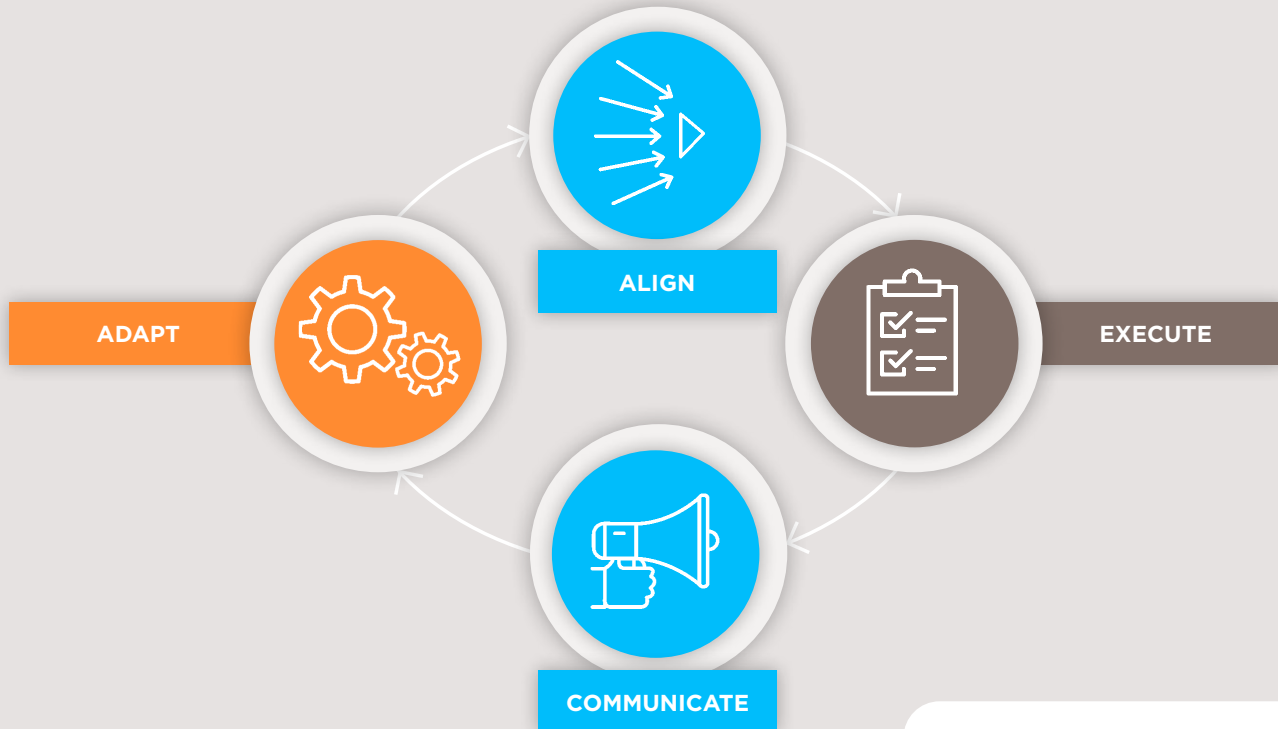


# ▶ Capturing and Keeping CxO Engagement

## for Customer Reference Success



## Business professionals generally acknowledge the importance of executive buy-in for company initiatives and new programs, even if only tacitly.

The need for executive support applies to customer reference programs (CRP) as much as any other initiative of significance. Executive engagement is needed to gain budget, achieve change management, and sustain a program long-term. Unfortunately, few aspiring or practicing customer reference (a.k.a. customer marketing) program managers effectively factor in executives in program design, and that can undermine the program.

Many VPs and CxOs have no idea how a CRP can strategically support their business goals, by which they are personally measured. The program is a nice-to-have or a necessary evil but not a vital function. Being a non-essential program nearly guarantees that the program will be roadkill if budget cuts are mandated not to mention a career dead-end for anyone who fully comprehends the power of customer advocates in marketing and sales activities.



**So how does a program leader avoid this situation and elevate their program?** This eBook provides specific, tried and true practices that every CRP manager can start applying immediately to change the game. The end goal is to give your company a serious competitive advantage through customer reference activities.

What many customer reference program managers fail to realize is that executive support is neither automatic nor altruistic. Executives get behind programs that support what's near and dear to them: the company's growth. It's another example of Darwin's survival of the fittest. **To earn executive commitment, CRP survivors connect the dots clearly showing how they contribute to executive and corporate goal achievement, not operating discretely churning out case studies or rounding up references for salespeople.**

## THE VIRTUOUS CYCLE

Introducing the success model that CRP leaders should follow in order to be relevant to executives and continuously evolve to remain strategically essential.



## ▶ Know the goals

### PRO TIP:

#### Know the “What” and the “How”

Every company has growth goals, but those may not be communicated in detail to the frontline staff. “We intend to grow by 20%” may be the overriding goal, but supporting it are specific strategies. That is the “what” the company must do.

The “how” might come in a variety of different ways. Growth may be achieved by entering new markets, new geographies, delivering the service in new ways, or building a robust partner channel. The CRP manager must know the details in order to build a synchronized program plan.

CRP staff, who are down in the proverbial trenches, can lose site of the difference between a short-term, tactical objective and an executive’s strategic goals. In fact, many CRP managers don’t know what the CMO’s corporate goals are, let alone how the customer reference program can and should contribute to reaching those goals. As a CRP leader, it is your mission to change that.

Do you know your executives’ goals? If this information isn’t shared as part of the annual planning process, then you have to track it down.

It’s not a secret, or at least it shouldn’t be. Ask your manager or your manager’s manager. In a well-aligned organization, executives expect their employees to know and understand the vision and direction of the company. After all, CxOs know they can’t get where they want to go if everyone is rowing in a different direction.



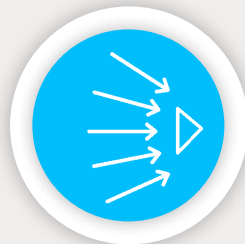
ALIGN

In some cases a lack of communication may make it difficult to get the 411 on top company goals. Not sure what to look for? Begin with the findings of this Deloitte and CMO Council survey on how CMOs are driving growth. The report identifies the top 5 ways that **companies** as a whole and **CMOs specifically** measure growth:

- Revenue (**95%** and **70%**)
- Gross Margin (**51%** and **20%**)
- Market Share (**40%** and **32%**)
- Customer Retention (**37%** and **27%**)
- Customer Satisfaction (**35%** and **25%**)

There are two key points to take away from this data:

- Revenue, by far, is the most important measurement
- A CRP absolutely has the potential to contribute to top goals and many of the other metrics CxOs care about listed in the report



**ALIGN**



# Research and plan

PRO TIP:

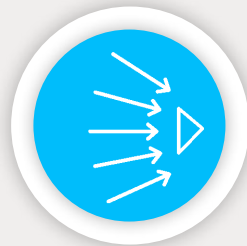
## Ask the right questions.

If you ask your leadership, “What are my goals?” or “How is my program going to be measured?” you may receive quotas such as, “X new references per quarter” or “Five new case studies a month this year.” Notice what’s missing? References and case studies in support of what specific end goal(s)? Building libraries of documents that aren’t in need is wasteful. Buyers expect relevant insights appropriate for their point in the buyer’s journey.

Be a consultant and discover, then prioritize the CRP efforts to meet those needs. For example, case studies for a specific geography, use case, industry or product line.

Think through all of the ways relevant and compelling advocate stories and perspectives can contribute to goal achievement so that you can align program objectives. This step demands detailed and thorough assessment.

Example: If a goal is to expand the international market, then learn country priorities based on potential. Learn how customers in those prioritized countries use your company’s solution. The answers you need begin with questions like this:



ALIGN

- What are appropriate advocate sales activities (e.g., reference letters are de rigueur in Asia)?
- What are the best marketing channels for customer advocate information (content, webinars, social media, events, etc.)?
- What are the language considerations?
- What stories will resonate with those buyers?
- Are there sufficient advocates in those markets to tell our ideal story?

## ▶ Create your plans and goals

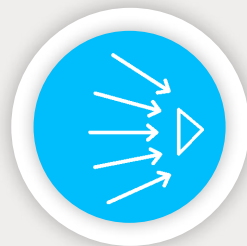
### PRO TIP:

#### Think deep and wide

Some uses of customer advocates and their stories are obvious, like a reference call or customer video within the buyer's journey. Your CMO will have specific marketing needs in support of revamped messaging or new product launches. Who better to provide invaluable perspective than the customers most invested in your success? Is your company making a foray into a new niche or geography? Existing "early adopter" customers in that segment are your eyes and ears in the market.

Once you have the corporate goals, and have a good idea of how customer advocates can be leveraged to help reach those goals. You'll need to identify what gaps you have to fill in order to meet the demand for customer advocates and content. This information forms the basis of your program plan.

After completing the discovery phase, you may determine that you need, for our example, 60 additional reference accounts across three countries. Realistically, that may mean 30 new program members for each of the next two quarters. **The end goal is to leverage customer content and the customer advocates themselves (calls, webinars, social media, etc.) in 75% or more of all opportunities.**



ALIGN

You may also have content goals based on demand at various stages for the targeted regions, and the formats for which sales has communicated the greatest need (e.g., 500-word stories and PowerPoint executive summary slides versus 2-page glossy case studies).



PRO TIP:

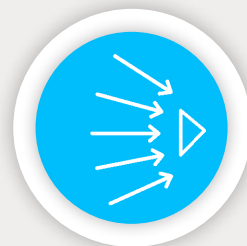
**Leverage your stakeholders**

You have colleagues in product marketing, business development, field sales, and other departments who have already accrued valuable business intelligence. Combine their findings with your own primary research (e.g., conversations with sales, PR, AR, etc.), and you should have a pretty good picture of how well your program is positioned to assist and what gaps need to be filled.

Build your plan with specific quarterly goals and find a balance between short and long-term goals. It's important to show success early while not losing track of initiatives that may take longer, but will have a bigger impact. Remember, all CRP goals should tie to company goals.

Just as managing upward to align with your CxO's goals is critical, so is horizontal alignment. Working with stakeholders across functions only strengthens the CRP's position as an essential function and affirms that your goals are well-informed. CMOs struggle with getting in agreement with company goals too. Just 31% of CMOs think their organization is aligned with company growth strategies and goals.

Only 18% of CMO's are supremely confident their organization can meet intended growth goals. As a marketing function that dovetails with the sales (the company's revenue engine), the CRP is poised to be instrumental in improving those odds.

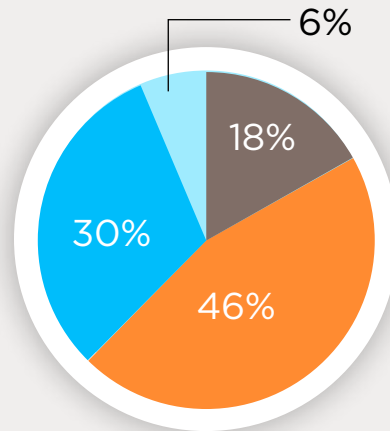


**ALIGN**

The lesson here is that while you should know your CMO's goals, do not assume they are in complete alignment with company growth goals (see charts on next page). When it comes time to acquire or retain budget you must demonstrate the CRP's contribution to the achievement of the CEO's growth goals.

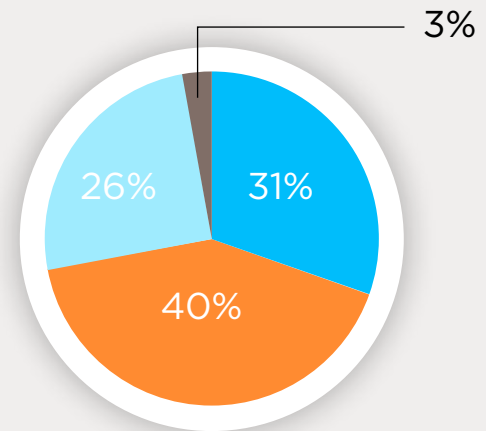
## CMO PREPAREDNESS TO SUPPORT COMPANY GOALS

How poised are you to reach intended growth goals?



- Extremely poised for success
- Fairly well positioned to succeed
- Success is likely but not guaranteed
- Losing ground and unlikely to succeed without change

How aware and aligned are organizational allies to your growth strategies and goals?



- Totally aligned and in full support of activities
- Supportive and quick to offer advice and recommendations, but not actively involved in deployment
- Aware of strategies but are focused on their own agendas
- Alignment on strategy is good, but they fail at the point of execution

Source: CMOs and The Spark to Drive Growth, Deloitte Development LLC

## ▶ Execute your plan

Finally, after conducting your research, gathering input and insight, and solidifying your goals, it is time to put that plan into action. Execution encompasses all of the tactical activities and daily decisions you undertake to accomplish your strategic goals. We won't go into details here, because as a program manager, you are already well aware of them. Instead, we want to acknowledge the reality of executing a strategic plan.

One of the most significant issues for mid-level marketing managers is staying focused. Bend too often to too many “emergency” requests, and you lose sight of and progress toward your top priority goals. Being entirely inflexible to changing demands and spontaneous opportunities can sabotage your success. Striking a balance is tricky, but essential.



**EXECUTE**

PRO TIP:

**Staying on track**

You must stay focused on your plan and balance the cost of responding to requests, demands, and opportunities. If you are asked by an internal customer of your program or your boss (or boss' boss) to take on an unanticipated project, make sure your stakeholders know how this is likely to impact the goals set for your program.

**Questions to address:**

- How important is this new activity to the company and my program?
- What resources will need to be allocated/diverted to achieve the result?
- How exactly will taking on this new activity impact your ability to meet your previously set goals?
- Is this a one-off fire drill emergency or a new direction for the company that requires the CAP to reevaluate and set new goals?

Customer Reference programs have to be responsive to both the needs of the sales teams they support and changes in the competitive environment. For example, a salesperson is working on a substantial deal and needs a reference or reference content that you don't have and isn't on your radar. You don't ignore the request or the chance to impact revenue by rigidly sticking to your original plan, your program adapts.

How do you do everything? You can't. You must automate the manual and tactical parts of the job so you have time to handle important tasks when they arise and still have time to make progress on your plan. Read more in our *Getting UnStuck!* eBook.



**EXECUTE**



## Share your plan

Once you've got your plan and goals together, you're ready to socialize your ideas with one or more executive stakeholders. The Marketing VP or CMO will likely have your budget, but the Sales VP or CRO leads the largest group of internal stakeholders. Assuming you've done your homework and have zeroed in on their needs and have their attention, then the next step is to ask for their visible and vocal support. So what are you asking them for, exactly? Time and money investment that has clear ROI.

You need on-going engagement with internal stakeholders, the consumers of your program's services. The importance of program visibility cannot be underestimated. Announcing the purpose of and

value delivered by a program is a good start, but as a CRP manager, you will need face time at sales meetings, sales kick-offs, and the ability to communicate through collaborative channels (Chatter, Slack, Hipchat, etc.). It is only through regular and reinforcing conversations with sales teams that you will reach the critical mass of engaged users to drive results.



COMMUNICATE

## ▶ Share **Relevant** Results

### PRO TIP:

#### **Revenue goals are king**

The more love you show to the company's growth goals, the more: a) budget you'll get to expand your capabilities, b) the program will be seen as a cornerstone to strategy, and c) you will be included proactively in strategic discussions that position your program to contribute even more.



**COMMUNICATE**

CRP managers tend to be most comfortable measuring and tracking tactical objectives, which is natural. While these may quantify output or efficiency of the staff, they don't answer the CXO's question of "How does this help me with my goals?" When vying for executive attention, you need to be able to show how your plan to support strategic goals is actually performing. It's all about providing easily digested proof of your program's impact.

In our previous example, the goal was the expansion of international sales. In that case, you'd want to provide information like this:

- How many international opportunities were influenced? What was their value?
- How much content, regardless of format, was produced specifically to support international opportunities?
- How were those new "assets" shared with the sales team?
- How many new international advocates were added?
- What gaps still exist and how are they being addressed?

PRO TIP:

**Be politely aggressive**

If you wait to be invited to sales calls and meetings, you'll be waiting a long time. Take the initiative to get a slot and be specific about what you intend to do with that time.

- Get feedback
- Share new resources
- Educate sales

Keep in contact with the people who plan sales meetings and be assertive when it comes to getting face-time. Putting a name and face on the CRP has many benefits. It is, after all, a relationship-driven environment.

Make sure you have an established channel to get the CRP's results to your CxO stakeholders—don't assume they've seen it, ask for feedback. Initially, you may even want to meet with those stakeholders to review

results and discuss plan modifications to adapt to changing conditions. Use quarterly scorecards, leverage existing dashboards, and make sure contributions to company growth objectives are front and center for all relevant CxOs.



**COMMUNICATE**



# Adapt to Change

Fine-tuning your program to company goals is a process, not a one-time exercise. Conditions change, and so should the CRP. Each revenue cycle brings new challenges, opportunities, and priorities to address. Done right, this becomes a virtuous cycle for the CRP.

- Evaluate top goals and align plans
- Execute your program plan to support those goals
- Communicate results
- Refine and apply new insights as you start the cycle again

With each cycle, you build credibility and the CRP achieves the strategic importance it deserves. This cycle of program activities reinforces and improves the program and the resulting outcomes. Savvy CRP managers who dedicate themselves to the process will reap benefits for themselves, their reference program, their executive stakeholders, and their company.



ADAPT

## IN SUMMARY

Jump in now and start employing the processes and tips outline in this eBook to make it work for your program. You might be surprised at how aligning your program to corporate goals will elevate the value of your CRP - and you.



### **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](http://www.point-of-reference.com).

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