ORIGINAL INTERVIEW TRANSCRIPT

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1,300+ words

Could you describe your program?

ReferenceEdge enables the marketing team at Databricks to scale the customer reference program. We leverage ReferenceEdge to track, monitor and report on all reference activities pertaining to marketing (all types except for peer-to-peer references). We have over 180 marketers serving more than 40 different go-to-market motions and strategies—each needing voice-of-the-customer (VoC) content to support the various campaigns, events, programs, messaging, and more. When the Customer Marketing team designed the formal reference program, we wanted to give the rest of the marketing organization the tools, resources and ability to drive their customer content and programming, empowering all marketers to be customer marketers.

Before deploying a reference management tool, we used a Google Form and found that most requests were on a first-come, first-served basis. We knew we had to become more strategic, organized, and respectful of customers' time. The Customer Marketing team needed to have a complete view into each customer—including any advocacy activities in motion and new requests—and couple that with which activities the customer was well-suited for and wanted to participate in to ensure we were offering them the most relevant and beneficial activity for them, and for Databricks.

Now, we have everyone on one platform, and each marketer submits a reference request for their various needs; whether a case study, blog post, webinar, PR opportunity, etc. As an example, if eight marketers are looking to use the same customer, the Customer Marketing team processes that information and works with the project owners to either consolidate the requests or prioritize the requested activities, and we look at which activities match the customer's advocacy preferences. This process gives us the ability to track all activities so we avoid burning out customers and asking too much of any one person or company. After completing each activity, we ensure the output/published content is in ReferenceEdge and tagged appropriately.

The Databricks marketing team spans many time zones and regions, so having a centralized tool is imperative. It gives us insight into our global customer base and enables us always to be a customer-first organization

Where did the initiative to start the program originate, and why?

It originated within Customer Marketing. We have a small Customer Marketing team, over 180 in Marketing and 5,500 employees and growing, and we have 10,000 customers. Before using a reference management tool, we received requests through a Google Form, one-off emails and Slack messages, which quickly became hard to track and manage. We realized we needed to scale. To scale, we created a new model—customer marketing everywhere—which would enable every marketer to be a customer marketer. We have developed various toolkits, such as a case study toolkit which includes an end-to-end process guide, email outreach templates, an interview question guide, a writer's guide, and a story template to follow. There are also toolkits for speaking engagements, blog posts, video development and more.

Who are your internal stakeholders?

Our key stakeholders are primarily within marketing: partner, product, industry, and regional marketing teams. Of the 180 marketers, there are about 100 using the tool (not all groups need access). Additionally, about 25 sales leaders in two business units have access to leverage the tool similarly to marketing. They are focused on driving customer blog content and need a way to manage and track the progress.

Marketers are generally the main stakeholders, so we needed buy-in from our Director of Customer Marketing, VP of Corporate Brand and Communications, and final approval from our CMO.

What were your top 3 challenges before ReferenceEdge?

The biggest challenge was the number of requests coming in from various channels. Between the Google Form, Slack messages and email, and each request being sent to a different customer marketer, we needed a central view into the requests and who would be managing the requests.

Another pain point was reference overuse. Without the visibility and tracking of references, it was difficult to understand when the last engagement was with a customer and how many activities they recently participated in.

The third challenge was activity prioritization. In customer marketing, we're looking at it from a global perspective, whereas our stakeholders from the various go-to-market workstreams are looking at it from their respective roles and responsibilities. They might want a top-tier customer to engage in a blog post, but the customer marketing team wanted to prioritize an analyst interview or a video testimonial or a global event. We needed to think more strategically about our advocates.

Since launch, what has changed in terms of your company's reference practices?

Everyone has a customer-obsessed mindset. People include customer advocates in all programs, activities, content, etc., while keeping a customer-first mentality; respecting the customer's time, interest, and story they want to tell.

From a program management perspective, adoption was a challenge for the first nine months, and in some areas, a work-in-progress. However, every team across marketing has VoC goals that have directly correlated to adoption. As we've partnered with various groups, and hosted multiple training sessions, office hours, training documents, toolkits, and more, it has continued to support our adoption goals and reference practices. Although every team is responsible for driving customer stories, we need guardrails, guidance, and processes to ensure a consistent voice. Now, with a unified view of customer reference activities, we are more unified, strategic, and collaborative as we approach customers to partner on various activities.

Since launch, how has your job changed?

Since the launch of ReferenceEdge, I've increased my focus on enablement, efficiency and scaling our program. I have decreased the number of external facing programs I manage, increased my focus on internal enablement, and continued to scale our customer reference program. ReferenceEdge has given our team visibility into each customer advocate, has enabled us to be cohesive as we work on various VoC programs, and provides a single source of truth. We complete over 150 reference activities each quarter between case studies, blog posts, speaking engagements, and videos globally. Before our reference program, we could not achieve that scale, it has been a true team effort.

What feedback have you gotten from stakeholders? Leadership?

All of the feedback we've received has been positive. Our stakeholders and leadership team appreciate tool consolidation and efficiency, and with one cohesive reference process, they can quickly gain insight into the reference pipeline. Additionally, we have created executive-level dashboards, which gives them a better understanding of the current state of our reference database and reference content.

What aspects of ReferenceEdge do you value most?

The most valuable aspect of ReferenceEdge is the ability to leverage Salesforce fields in reference searches and reports through access to a tool everyone is familiar with. The reports and dashboards are critical to our success. We have created about 15 different dashboards for the various teams to leverage. And for marketing users, the [reference search] page is helpful for searching for accounts, contacts, and content using the pre-defined filters we've put in place which map directly to those go-to-market motions.

We are also using the integration with Slack, which is helpful and streamlines our workflow. For admins, whenever a nomination or request comes in, our direct reference team can start a thread on the request before responding to the requestor. Once we respond, the requestor receives a Slack notification. Our organization uses Slack heavily, so it's nice to have the integration.

How do you measure program success?

We measure internal adoption and external output. For internal adoption, we look at how the database has grown quarter-over-quarter by new contacts, accounts, and nominations. We have a goal every quarter that we are measuring against. For external output, we track completed requests, published content, and speaking engagements.

How does Point of Reference service compare with other vendors with whom you work?

The level of support we've received from our account director is outstanding. We meet regularly to strategize on how we can optimize and tweak various processes to better leverage ReferenceEdge. She has really become an extension of our team and is always very responsive. It's clear that the entire team is invested in helping us be successful and partnering with us.