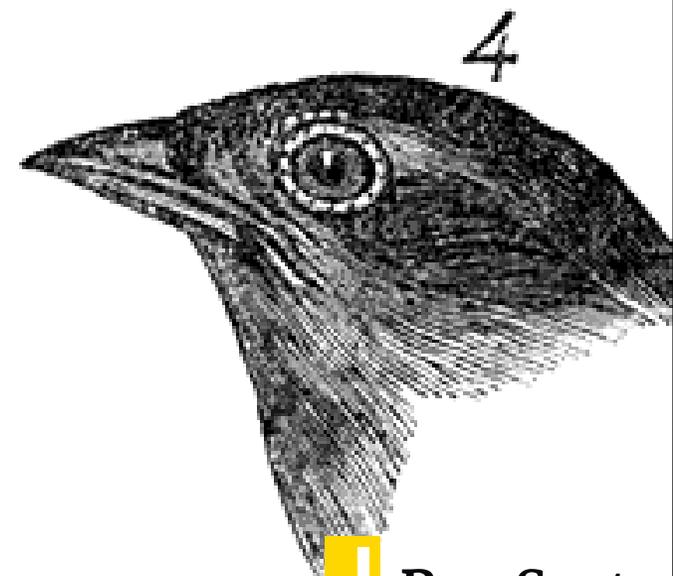
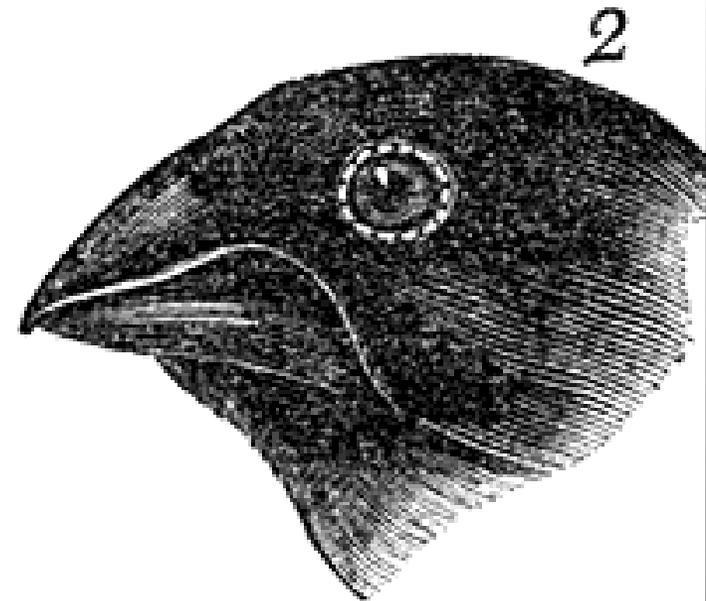
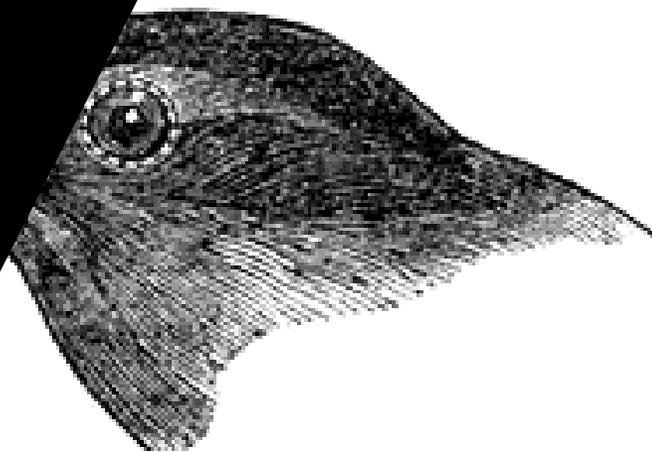
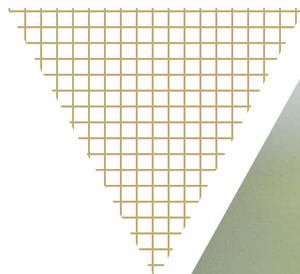


The Customer Reference (R)evolution



My story

Alison is an experienced marketing professional committed to building exceptional relationships with internal & external customers. A Top25 Customer Marketing & Advocacy Influencer, she moves advocacy programs from merely transactional, to an engaging, multi-dimensional customer experience. With >20 years in marketing, customer success and sales operations, she knows what truly drives organizational growth—the customer voice. While her true passion resides with customer marketing, Alison fancies herself a better-than-average baker and cook, an avid nature lover, curious explorer, and animal welfare enthusiast.



Overview

- A History Lesson
- Time for a Change
- Definitions & Naming Conventions
- Resetting Expectations
- Real Examples of “How To”
- Questions/Discussion



Customer references: A history

Sales needs a reference

Sales knew they needed a reference for this proposal five weeks ago; they thought someone else was taking care of it

Sales begins to panic

Sales pulls out their "little black book" of previous customers and tries to secure their own reference

Sales' lack of planning becomes your emergency

You start the scramble of securing references that can be leveraged within the proposal

Sales asks everyone else in the company for a reference besides customer marketing/advocacy

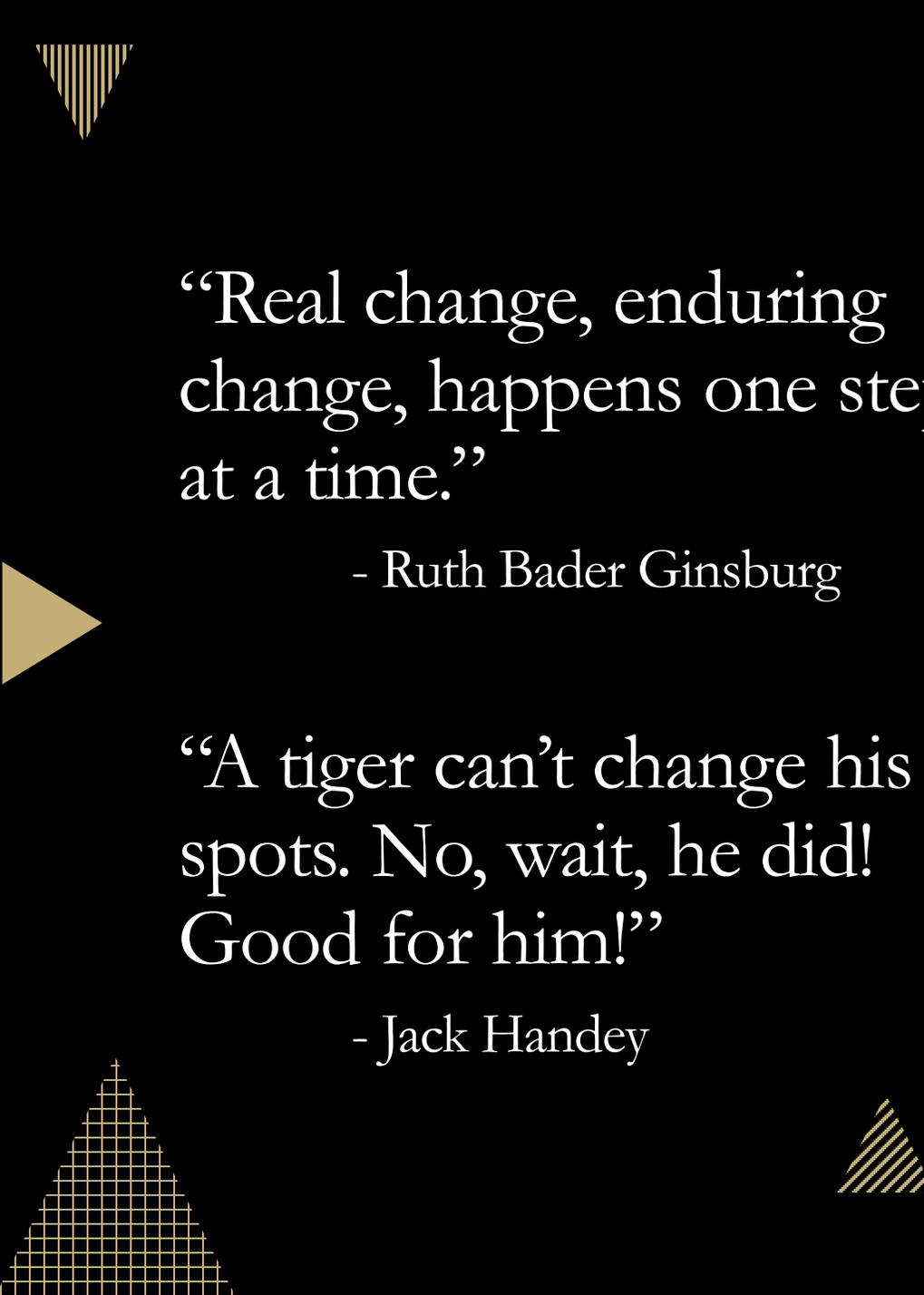
Sales seeks reference

You learn, through the grapevine that sales is struggling to find a reference

Through the grapevine

Leveraging your connections and expertise, you deliver the references in record time

Customer advocacy saves the day



“Real change, enduring
change, happens one step
at a time.”

- Ruth Bader Ginsburg

“A tiger can’t change his
spots. No, wait, he did!
Good for him!”

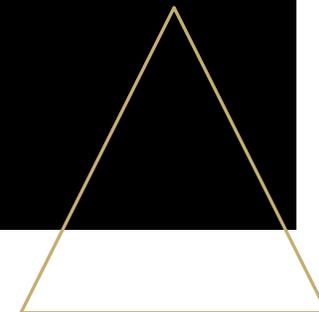
- Jack Handey





What's in a name?

- Does what you call a reference matter?
- If a reference is framed differently with customers, will you be more successful?





noun (boring)

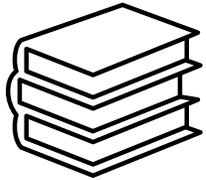
1. A round patty of ground beef, often served on a bun or roll



descriptive language (exciting)

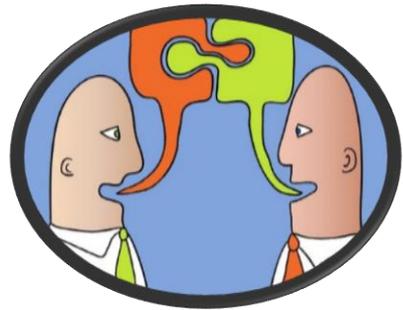
1. Baconator
2. Double Animal Style
3. Cowboy Burger
5. Royale with Cheese

Hamburger



noun (boring)

1. The action of mentioning or alluding to something
2. The use of a source of information in order to ascertain something



descriptive language (exciting)

1. Recommendation
2. Testimonial
3. Peer-to-peer conversation
4. Character resource
5. Review

Reference

Create a new vocabulary; frame it properly with advocates in order to gain buy-in

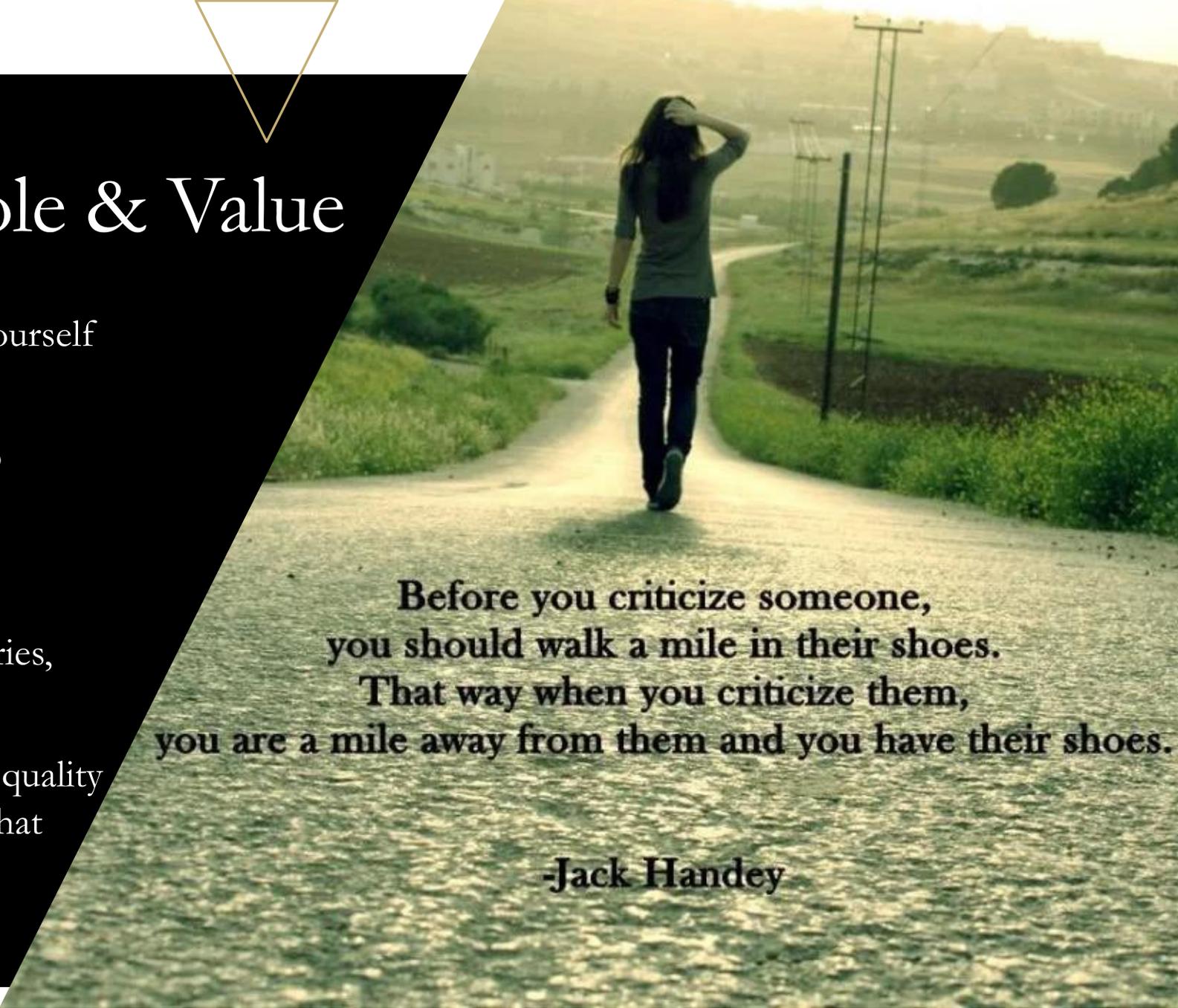
EXPECTATIONS

Set *AND* manage expectations for stakeholders

- Remember your worth
- Don't be a doormat
- Be a gentle bulldozer
- Bring in your top supporters

Establish your Role & Value

- Expert in your field; do not sell yourself short
- Trusted advisor and gatekeeper to customers
- Liaison across the organization
- Creator of impactful content, stories, and sentiments
- Proven track record of delivering quality references and timely references that impact TCV

A woman with long dark hair, wearing a grey long-sleeved shirt and dark pants, is walking away from the camera on a dirt path. She has her right hand raised to her forehead, possibly shielding her eyes from the sun. The path is surrounded by green fields and hills under a bright, hazy sky. In the background, there are utility poles and a fence line.

**Before you criticize someone,
you should walk a mile in their shoes.
That way when you criticize them,
you are a mile away from them and you have their shoes.**

-Jack Handey

Set AND Enforce SLAs

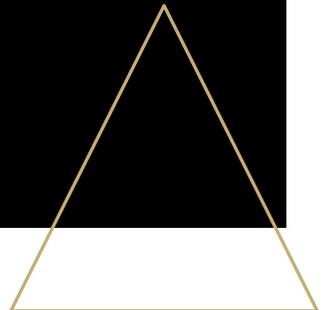
- Process for reference requests
- Responsiveness expectation
- Delivery expectation – not only turn-around time but the type of content provided
- Non-Approved references (eliminate the little black book)
- Create a Governance council of senior leaders



We're humans

▶ Never underestimate the human element

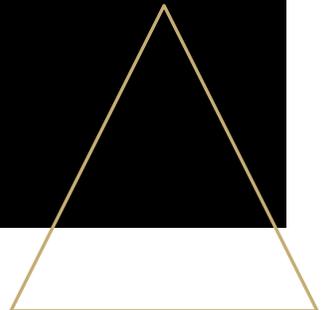
- Relationships matter
- Bring back the golden rule, and then improve it





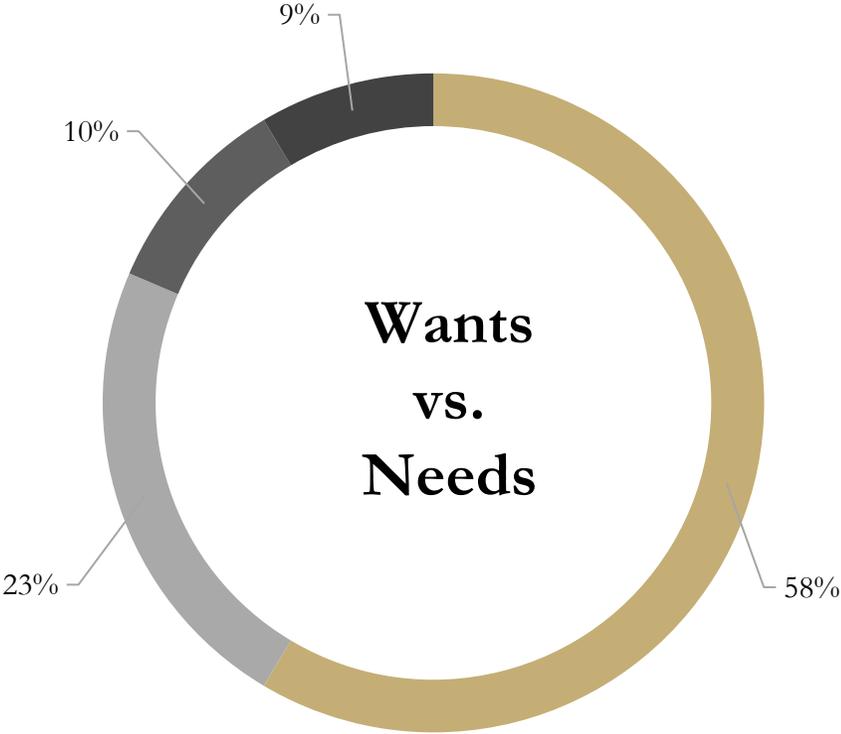
Executing the evolution

- What are tangible items you can focus on to start the evolution?
- How do you prioritize?



Quantify “X”

What do stakeholders really need?



- Proposal Language
- Scripted Responses
- Videos
- Live Phone Calls

Find the right option

STATIC CONTENT

Options that are “grab and go,” but still provide extremely impactful content driven by customers. These forms grant flexibility and relieve the burden on customers, while also filling the request/need:

- Proposals in the initial response stage
- General requests from prospects/customers
- Finalist/meetings with prospects/customers

“LIVE” CONTENT

Options that provide video or in-person connections, relying heavily on the human element of the interaction. These forms require customer time and should be reserved for specific opportunities:

- Driving a deal across the finish line
- Specific request from prospect/customer
- Your customer would prefer it



Options

Static Proposal Response to Reference Request

A generic response that can be inserted into a proposal during the initial stages

Pre-scripted Reference Responses

Text feedback from customers that tackle the usual suspects

Marketing Collateral

The wealth of information that marketing delivers (case studies, blog entries, etc.)

Customer Videos

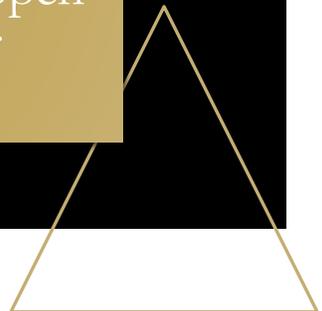
Pre-recorded responses from customers that tackle the usual suspects

Live Reference Calls

Connecting a prospect or current customer with another customer to discuss use case.

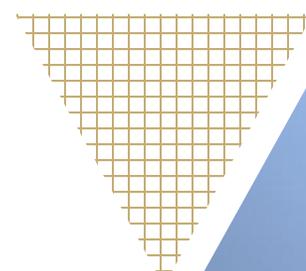
Networking Groups

Regularly scheduled sessions hosted by a customer open to prospects/other customers



Tools & Technology

- How are you executing the process?
- How are you tracking requests?
- How will you report on your work & outcomes?
- How will you connect results to business goals?



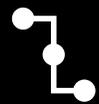
Strategy: One size does not fit all

Considering the following when building your strategy, content, and approach the reference evolution:

- Reward or not reward for references?
- Setting SLAs for deal size?
- Leverage the low-hanging fruit to develop content
- Build a self-service model



Questions? Let's chat!



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