



## THE CUSTOMER ADVOCACY MINDSET

Customer advocacy helps you close more business, and there isn't a sales professional in the world who would say no to a raving fan customer who is singing your company's praise. Gaining referenceable customers who are willing and ready to share their experience with the world can seem a little more challenging.

To improve advocacy we have first to consider it not as a need that we must have to do more business, but rather as a way to better serve and delight those that use our offerings. That sounds simple, but if we are honest with ourselves, we will see that our customer reference efforts have been us-focused. We've treated our best customers from a place of need and not a place of service. We need their reference-ability over we need to serve them extraordinarily. If we are serious about making our customers raving fans, we must turn our advocacy efforts to be completely service oriented.



## HOW TO DO GET THEM TALKING



### 1. Surveys and Business Reviews

The standard practice of surveying customers on some regular schedule, or conducting a periodic business review with key clients is a perfect opportunity to develop improved customer advocacy. The key is to seek transparent and honest feedback while focusing also focusing on specific areas of the offering that you believe (a) has been a success for the customer and (b) is an example that new prospects would find valuable in their decision-making process.

#### ACTION PLAN

- Keep survey brief requiring no more than five to ten minutes to complete
- Include open-ended responses to allow customers to elaborate on specific scenarios
- Ask success seeking questions that encourage candid and transparent response
- Ask for permission to follow up with a phone call or offer personal review of the survey results
- Create thematic business reviews that focus on specific use-cases that apply discretely to the customer's business



### 2. Trade Events

There are two solid opportunities for improved customer advocacy at trade events. First trade events are natural pipeline building and sales opportunities. The likelihood that key customers will be at the same event as key prospective customers demands that you prepare to connect the two properly. The connection must be the focus. We want to connect two like-minded professionals that will have much in common and be of value to one another. Secondly, events are inherently social, and social events put even the most introverted introvert in a talking mood. Conversations about product or service impact should be capture when possible. Ideally in video or audio.

#### ACTION PLAN

- Know which customers will be attending the trade event
- Reach out to customers before the event with something that will be of value to them. (e.g. suggested sessions to attend)
- Maintain list of prospects that you also expect at the event
- Create formal outreach to both parties with the intent to make the introductions
- Prepare to facilitate the discussion by asking probing success oriented questions
- Ask both parties if you can capture their thoughts via video
- Consider creating a schedule for willing customers to sign up



## 3. Social Media Engagement

If your company has any social media presence, it is likely that customers are engaging you there. Regardless of the platform social media gives customers a voice, but also gives us an opportunity to connect personally with them outside the formal channels of our sales and support process.

Additionally, we can and should be monitoring social media to discover the conversations that include mention of our company directly or even indirectly. When the conversations occur, we must engage in them at a personal level. That is we can't leave it up to the corporate Twitter account to reply, we have to have a real member of the team engage in these conversations. Positive things said about us in the public square can be shared informally and formally. A tweet, Facebook reaction or Instagram comment are potential mini testimonials in waiting.

### ACTION PLAN

- Increase the social media monitoring by using a tool like Hootsuite, Social Mentions, or even Google Alerts
- Prepare for specific scenarios to turn around potential complaints to satisfaction
- Save positive social media reactions and consolidate for formal publishing as a sales tool (you should ask for permission but remember social media posts are already in the public domain)
- Ask customers who have expressed positive feelings across their news feed to be interviewed



## 4. Customer Service

Customer service is not only an opportunity to address our customers issues, but also engage them in a deeper discussion about how they are using our offerings. We must be prepared to explore their use and dig deeper than usual to uncover the dramatic elements to the way the customer is succeeding. What impact is it having on their immediate team? Their most important customers? Their employees in general? As we answer and solve problems for our customers, we also have to commit to getting to know them a little more closely.

### ACTION PLAN

- When a call elicits praise we must ask if we can use the praise as a testimonial
- If recording calls, include in the recording disclaimer that with permission the call will be used in promotional materials
- Consider creating a closed Facebook group for customers that have run into, and overcome similar problems.



## 5. Repurpose Existing Case Studies

Even if our customer advocacy is poor, odds are that you have some case studies of some sort on hand. These are typically in a before after format that calls out key dollars and cents sort of metrics. These sales tools are perfect fodder for repurposing. The customer has already given their consent to have their story told, so revisit it and find out more about the emotions that live behind the numbers of the case study. As more is learned by engaging the customer map out specific types of content production that can better tell the details.

### ACTION PLAN

- Inventory all existing case study assets and evaluate for relevancy
- Write multiple blog posts for each major element of the existing case study
- Invite the customer to discuss the case study in more detail
- Ask the customer to participate in a webinar that allows you to dig deeper into the case study
- Consider creating social media content that rolls out the updated storyline
- Create email signatures with quotes from the existing case study



**6. Career Spotlights**

Make it about the professional and not the company that they work for. Most employees are free to discuss their career development as they see fit. Whether it is over social media, as a member of a panel at a trade event, an update to their LinkedIn profile, or just hanging out with others in the industry, professionals share information about their career. We can capitalize on this reality by inviting key customers to talk about themselves not their company. We can use this content to promote them as top performers in their field.

**ACTION PLAN**

- Create profile of the type of customer that you want to make an all star
- Formalize the program and regularly feature a member of your customer-base that is doing great work
- Make it easy for those to figure out who the customer works for by linking to their LinkedIn Profile
- Create a before-after journey for typical professional who face the problems that your offering solves

**TAKE ACTION NOW PLAN**

*The most important takeaway here is that customer advocacy has much more to do with culture than anything else. That is the very first step, understand that your entire company culture has to be ordered to be relentlessly focused on how you can serve your customers better for no other reason than for their success. Cultures don't change overnight, so if you are not there yet, it shouldn't prevent you from heading in that direction so consider the first step a decision to make your culture one of relentless selfless service. If you are prepared to make that decision here are the **TAKE ACTION NOW** steps that will immediately impact your customer advocacy:*

- 1. Pick ONE area of the six to focus on**
- 2. Select a SINGLE recommendation under the selected focus area**
- 3. Create a plan of three to five tangible actions**
- 4. Assign responsibility to a single member of your team**
- 5. Communicate the intended actions to the entire company**
- 6. REPEAT**



*Joel Capperella brings over 20 years of strategic marketing execution in the enterprise software, SaaS and technical professional services to the game. He helps clients create a content culture, habits that connect story to sales, get crazy amounts of awareness, a bigger pipeline, faster revenue, and empower transformation. He works with companies of all sizes. From juggernauts like SAP and Oracle, to small startups with new injections of cash.*