



The B2B Marketer's Field Guide to Customer Engagement

Leveraging Advocacy to
Drive Brand, Demand
and Profitable Growth

November
continued early
Post many English
road, packed with
You can't catch the bloody
beggars. See - 6 we learnt
but a - up early. But 2 M. had
small rest & cleaned up
a bit. I saw of Red Cross
shoe left at 1 PM to continue
Camped at 7.00. Guard at hotel
Saw 3 - Packed up in dark at
2.00 A.M. Hiked several hours
then rested on road after
the house. Saw wrecked
bridge, pack on one side.
Ready to cross Eagle's Nest
came to our rescue. Kitchen
left behind yesterday.
Mon - 8. Crossed river at 7.00
dug bridge washed & burning
lay on sand bar to us.



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Customer engagement occurs over the lifetime of your relationship with a buyer



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The traditional rules of engagement in marketing were built around campaigns, offers and product pitches. Outbound messaging was the name of the game; however, the realities of today's self-navigating buyers have turned those rules on their head.

Customer engagement begins the moment a buyer spots a mention of your company on social media or hears about your product from a peer in their industry. Prospective clients are actively listening to what your current customers have to say. What are they hearing about your company, solutions and people?

While that first interaction with your company is hopefully one of many, customer engagement occurs over the lifetime of your relationship with a buyer.

Therefore, developing a strong connection with customers is critical not only for building brand awareness, it plays a role in acquisitions and retention, as well as cross-sell and up-sell opportunities. Engaged customers will be more inclined to effectively represent your brand through blogs and social media, videos, case studies, speaking engagements and other activities.

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80% of reach
from marketing
campaigns now
comes from
amplification
through advocacy.

— @SocialOgilvy



The B2B Marketer's Field Guide to Customer Engagement (Cont.)

Leveraging Advocacy to Drive Brand, Demand and Profitable Growth

In today's connected world, customers are not shy about sharing their opinions, and B2B marketers need to get in the game early or risk having others drive the conversation about their products and services. Customers now play by their own set of rules, choosing to engage with you at any time and through any channel. You need to be ready to respond.

The solution is to mobilize your customers as advocates who can tell your story. By fully engaging customers early in the buying process, you have more people offering insights on your behalf. A strong advocate community

is your secret sales force in today's fast-paced environment where buyers digest information in 140 characters or less.

According to the [Demand Gen Report 2014 B2B Buyer Behavior Survey](#), 36% of those surveyed rely more on peer recommendations than they did a year ago. Research from [Social@Ogilvy](#) also noted that 80% of reach from marketing campaigns now comes from amplification through advocacy. Getting customers to take that extra step and share their positive feelings about your company can truly make or break your marketing effort.

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The B2B Marketer's Field Guide to Customer Engagement (Cont.)

Leveraging Advocacy to Drive Brand, Demand and Profitable Growth

In particular, a formal advocate marketing program can help ensure customers are optimally interacting with your brand at all stages, with specific exploration of:

- **Referrals** — When customer advocates submit the names of peers who would also be a fit for your products or services. These are some of the most sought-after leads and where your advocate marketing program can really contribute to your company's bottom line.
- **The Discovery Stage** — When buyers are learning about the features of your services – and others. Blogs, social media, user reviews and other online content figure heavily at this point in the buyer's journey.

■ **Final Selection** — When buyers reach this point, your advocates have already likely influenced their decision-making process. At this stage, however, they may also ask you to connect them with advocates who can speak about specific challenges in their industry and role.

■ **Onboarding Stage** — When buyers have made the commitment to invest in your solution and are looking for advice from current customers and product experts to get the most from their investment.

■ **Providing Feedback on the Product or Service** — When a customer has spent some time with your product or service, and is in a position to provide input on what is working and what needs adjustment.



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“Companies that have improved engagement increased crosssell by 22%, drove up-sell revenue from 13% to 51%, and also increased order size from 5% to 85%.”

— R “Ray” Wang,
Principal Analyst & CEO,
Constellation Research



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The B2B Marketer's Field Guide to Customer Engagement (Cont.)

Leveraging Advocacy to Drive Brand, Demand and Profitable Growth

All of these activities ultimately increase customer engagement, driving demand and revenue for the company.

“Customer engagement is highly correlated to customer loyalty,” according to Aimee Lucas, Customer Experience Transformist and VP at the Temkin Group, a customer experience research and consulting firm. “Companies need to start by understanding how their interactions are meeting the functional, accessible and emotional expectations of their customers through a ‘voice of the customer’ program.”

Companies with more engaged customers are seeing the results on their balance sheets, experts say. “The impact is massive,” notes R “Ray” Wang, Principal Analyst and CEO at Constellation Research, an advisory and research firm. “Companies that have improved engagement increased crosssell by 22%, drove up-sell revenue from 13% to 51%, and also increased order size from 5% to 85%.”

Throughout this eBook will be examples of how companies have put advocate marketing at the center of their customer engagement strategies. They are writing the new rulebook and making customer engagement the focus of the story.

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"Without customer engagement, we don't have advocacy."

— Deena Zenyk,
SMART Technologies



SMART Technologies Gets Smart About Customer Engagement

There is a distinct difference between a customer, a fan and an advocate. "Advocates are people who are not just fans of your products, but they are passionately engaged and ready, willing and able to share their story," says Deena Zenyk, Advocate Marketing Manager for SMART Technologies, a vendor of collaboration hardware and software for business and education.

Customer engagement is a critical component of SMART Technology's overall business strategy, Zenyk adds. The company uses customer feedback to shape new products and develop events, among other initiatives.

"Without customer engagement, we don't have advocacy," she explains. "You need customers who like your brand and like what you do, or you're not in business very long. However, if you are not engaging your customers, you are not opening up space to nurture and grow those relationships. You need

customer engagement to open the door to ramp up your advocacy initiatives."

Zenyk says customer engagement has a huge impact on her role as an advocate marketing manager charged with building the company's growing group of advocates. In her role, it is important to have a customer engagement plan that is easy to execute and measure, she notes.

The company is currently focusing its engagement efforts on in-person events and meetings, Zenyk says. "We all have a tendency to get bogged down in e-communication. We don't want our customer to become an email address, so we are bringing them together to connect with us and one another, person to person."



Deena Zenyk
Advocate Marketing Manager,
SMART Technologies

SMART
Technologies

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"We're seeing daily and weekly reports and more than 50% of our advocates are engaging."

— Deena Zenyk,
SMART Technologies



SMART Technologies Gets Smart About Customer Engagement (Cont.)

SMART Technologies has been better able to match advocates with the right opportunities using Influitive's B2B advocate marketing software, AdvocateHub, says Zenyk. The company had previously used a spreadsheet to manage its advocate marketing program.

The move to a more comprehensive system for managing advocate engagement has improved advocate satisfaction levels, she notes. "It has certainly had a positive impact on the customer experience, because the doors are now wide open between us and our advocate community. They choose their own experience. The process is now streamlined, so that they can tell us if they are interested in accompanying us to a trade show, writing a blog or

other activity, and respond to appropriate challenges."

Zenyk says more engaged advocates are able to grow and learn from one another. "They see the benefits of being a SMART advocate and it just snowballs. They are also seeing the rewards of meeting other SMART advocates."

SMART Technologies is seeing engagement with its advocates skyrocket, she adds. "We used to reach maybe 10% of our advocates with authentic engagement. Now, with the ability to opt-in to the activities that suit their needs and schedules, engagement is off the charts. We're seeing daily and weekly reports and more than 50% of our advocates are engaging."

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Marketing plays a crucial role in creating positive customer interactions that drive customer loyalty.



The Impact Of Customer Engagement

A focus on customer engagement throughout the customer lifecycle determines your customer's experience with your company. One-time initiatives to address specific opportunities may drive incremental improvements in the customer experience. However, sustained differentiation and customer loyalty requires more than a veneer. It requires a deeper set of changes.

"Sustainable customer experience also requires a deep understanding of customers and uses customer insights across the organization to guide decision making about the experiences it designs, the processes it defines, and the products it creates," explains Lucas.

Don't overlook marketing's role in creating positive customer interactions, experts emphasize. "Once you have an accurate picture of what your customers need from you after they buy, look

for gaps that marketing's toolkit can fill," says Megan Heuer, VP and Group Director for SiriusDecisions, a global research and advisory firm. "Marketing is generally an untapped resource for customer relationship nurturing. The process map shows you where to focus and make those contributions."



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“It is extremely important for marketers to have an active, happy and engaged customer community in which to embrace prospective customers.”

— Jen Howard,
Clarizen



How Clarizen Turns Customers Into Brand Champions

Like many companies, Clarizen finds that prospects often research their company by connecting with like-minded customers over the social web or speaking with a reference. The company is a leader in enterprise work collaboration software.

While today's buyers have come to expect real-time interactions, they're also hungry for the human touch that inspires brand loyalty.

As a result, customer engagement — including advocate marketing — plays a pivotal part in Clarizen's overall business strategy. Jen Howard says it is also critical to her role as senior manager of corporate marketing for the project management software vendor.

“It is extremely important for marketers to have an active, happy and engaged customer community in which to embrace prospective customers,”

Howard explains. “Not only will advocates promote your brand socially, helping to increase awareness, but ideally they will give your prospects that boost of confidence in selecting your solution — ultimately growing your business.”

Clarizen uses a variety of tactics to keep customers engaged. The company's Champions League, which is managed on the Influitive platform, is one key component. “Having our advocates complete challenges from learning educational tips to providing references certainly keeps them more engaged,” she says.



clarizen
the way to work

How Clarizen Turns Customers Into Brand Champions (Cont.)

The company also holds regular global "Champions Events." Select customers are invited to meet other customers, share success stories, as well as learn best practices from Clarizen staff on a more personal level, Howard explains.

A community and support site, The Clarizen Success Center, acts as a central location for both best practices and support needs, as well as an online community, enabling customers to collaborate, engage and learn from each other in real time.

"We also have a responsive social media team — one that catches issues either before they occur, or directly afterward and responds in real time so customers know they are being heard," Howard notes.

Clarizen also offers free consulting in the form of daily Q&A webinars. "We have an expert on the phone delivering tips and answering questions, at no cost to customers, every business day," she says.

All of these initiatives have an impact on the customer experience, Howard explains.

The VIP experience and intimate nature of the Champion events foster a mutual respect, according to Howard. "Face-to-face communication and interaction goes a long way and it will keep our customers coming back for more."

The Success Center is part of the company's vision to drive first-class customer service, and enable Clarizen users to engage and learn from one another.

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“In a SaaS business model, renewals are king and churn is your worst enemy.”

— Jen Howard,
Clarizen

How Clarizen Turns Customers Into Brand Champions (Cont.)

Social media is becoming increasingly important to the customer experience, Howard says. “When customers feel like they're personally heard and addressed, they're more likely to stay loyal to the brand and spread positive word-of-mouth. The converse is also true — bad reviews travel fast.”

The Q&A webinars enable the company to communicate with customers in a personal way, but on a broader scale — regardless of size or geography.

With a reliable advocacy group of engaged customers, Clarizen's marketing team has more opportunities

to provide sales with strong references to help close deals.

“New customer acquisition is a win all around — especially for the company bottom line,” she adds.

A happy customer base is also great for retention, Howard notes. “In a SaaS business model, renewals are king and churn is your worst enemy.”



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Understanding customer needs, issues and challenges can help determine the types of engagement that are going to be most successful.



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Making The Most Of Every Interaction

Every customer touch point needs to be negotiated carefully to maximize the impact on sales, marketing, service and product development. "A key way to view engagement is that this is about a continuum of touch points," says Wang. "You have to view these continuums based on use cases and scenarios that span departments and go through a customer journey."

A critical starting point is understanding customer needs, issues and challenges. Then determine the types of engagement that are going to be most valuable, says Russell Kern, founder and CEO of KERN, a marketing and data consultancy. "Should it be face-to-face conversations, information on how to get better value from current products or services purchased, or providing information and programs on additional services and products that would be of value to a customer?"

Examining customer roles is also a crucial step to enhancing engagement. "Just like we have buyer personas, we need to understand the customer roles that must be supported in the post-sale customer lifecycle," says Heuer. "There may be users who were never involved in buying who need support post-sale support, and they will have different needs. Consider extending personas to cover customer roles."

The next step is to map out the post-sale lifecycle for those roles. "At first, it should be a basic representation of what happens right after the sale though all the stages of the post-sale customer lifecycle," Heuer adds. "What do customers want to accomplish as they engage with you? How will they get value from what they bought? How do all of your internal functions contribute to that experience?"

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"You can't steal our most loyal fans. And it's those champions who believe in Rally who are posing as an extension of our company's culture and as the internal sales rep at our strategic accounts."

— Hannah Shain,
Rally Software



Rally Software: Engagement Drives The Customer Journey

At Rally Software, a leading global provider of cloud-based solutions for managing agile software development, customer engagement is one of the company's key differentiators. "We view customer advocacy as our unfair competitive advantage," says Hannah Shain, Customer Programs Manager at Rally Software. "You can't steal our most loyal fans. And it's those champions who believe in Rally who are posing as an extension of our company's culture and as the internal sales rep at our strategic accounts."

The marketing team acts as trusted advisors for the customer journey, making customer engagement critical

to her role as Customer Programs Manager. "Engagement and empathy are key to make sure we are on the right track in terms of the customer experience. We take the outside-in approach in designing the experience from the eyes of our customers. On a personal level, it is exciting to work with people who are as passionate as I am in finding, activating and retaining happy customers."



Hannah Shain
Customer Programs Manager,
Rally Software



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Rally Software: Engagement Drives The Customer Journey (Cont.)

Shain adds: "And it's so exciting to be part of a customer advocacy team that is consistently looking for new, creative ways to keep advocates engaged and echoing their voice in the market."

Improving the customer experience is a top priority of Rally, according to Shain, and more specifically, customer advocacy is playing a key role in that strategy. "We look at likeliness of customers to promote our products and gauge their sentiment for the brand. This helps shape our decisions about the solutions we deliver. We also put a keen emphasis on being a customer-centric organization and there is always someone in the room who is the voice of the customer."

Shain says the company is making a concerted effort to use different communication channels for customers to tell their stories. "We're looking at all types of marketing assets, such as video, blogs and case studies, for customers to tell their stories and so that we have a nice mix of content to reach various audiences in various formats."

Like many software firms, a majority of Rally's new revenue comes from existing customers. "Whatever we can do to retain that business is helping our bottom line," Shain concludes.

**Disclaimer: The opinions expressed are Hannah Shain's alone and do not necessarily represent the positions, strategies, or opinions of Rally Software Development Corp.*

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"Both sales conversations and important advocacy-based content becomes critical."

— Tony Zambito,
Buyer Persona Authority



Best Practices: From Referrals To Product Feedback

There are a number of ways to improve customer engagement at every stage. The following are some best practices for interacting at various points in the customer lifecycle:

■ **Referrals:** Part of the discovery stage for many buyers is speaking to other users in their sphere of influence. Referrals are the foundation of advocate marketing.


Marketing should be providing customers with easy ways to encourage referrals, via everything from advocate marketing technology or simple social sharing options, Heuer notes. "Not doing this is leaving money on the table, literally."

■ **Later Stages Of The Buying Process:** Advocate marketing strategists need to understand from buyers, as well as their

sales teams and partners, what assets or interactions are needed to help move a deal forward and help close it, according to Heuer. "Many advocacy and reference assets aren't connected to a specific deal stage or customer need, and that's a mistake."

Buyers are looking for affirmation they are on the right track later in the sales process, emphasizes Tony Zambito, an authority on buyer personas. "Both sales conversations and important advocacy-based content becomes critical." At this stage, positive stories from advocates can inspire buyers and reinforce their desire to change, so industry- and role-specific case studies and other content works best.



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During the onboarding process, it is important to clearly communicate involvement level, expectations and beneficial outcomes of an advocacy program.

Best Practices: From Referrals To Product Feedback (Cont.)

■ Final Selection and References:

Nearly every buyer will ask for references, and it is often one of the first opportunities they have to speak with someone outside of your organization about your product or service.

Asking for references is an important process, which today needs to be founded on positive social comments from customers, Kern explains.

■ **Onboarding:** Companies need to think about the unique journey of the new customer and thoughtfully design the experience, says Lucas of Temkin. "New customers want to love you, but they are willing to hate you. And this is why new customer onboarding — while it may not be the most glamorous part of the customer journey — is an important one to focus on."

Heuer explains: "It's not a best practice to flat out say, 'Will you join our advocacy program?' I see a lot of complex agreements and lists of demands from advocacy teams looking to cover too many legal issues way too early in the customer relationship."

Spend time identifying customers who have a story to tell and offer them ways to share that story, Heuer says. "Find out what the customer cares about and help them get it. Match the advocacy participation request to their life-cycle stage."

Clearly communicating involvement level, expectations and beneficial outcomes of an advocacy program has to be evident to customers, Zambito notes. "Otherwise, they will think 'Why bother?'"

Best Practices: From Referrals To Product Feedback (Cont.)

■ **Feedback:** Advocate marketing teams often have responsibility for advisory boards, executive briefings, user groups or other customer events where important feedback is collected formally and informally.

"The key is making sure that feedback reaches those who can take action on it, and then communicating back to customers what was done," Heuer says. "Advocacy and reference teams should also be tapping into customer feedback from other sources to find customers who would make great advocates."

* Excellent	<input checked="" type="checkbox"/>
* Good	<input type="checkbox"/>
* Fair	<input type="checkbox"/>
* Poor	<input type="checkbox"/>

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"In leading support and advocacy for my company, I feel privileged to work with our customers every day — really getting a hands-on feel for the things they're finding value in and what their pain points are."

— Nicole Naidu, *CloudOn*



CloudOn Finds Creative Ways To Engage Advocates

At CloudOn, customer engagement is integral to growing the user base for its cloud-based productivity tools.

"Customer engagement is critical to the success of any company," says Nicole Naidu, Manager, Customer Advocacy and Support. "If you don't have a real sense of what your customers are doing — what they want, like, love, hate, value, etc. about your product and/or service — how can you have a true sense of what you're doing right and where you're missing the mark?"

Naidu explains that finding creative ways to keep advocates engaged is essential to her role as a customer advocacy manager. "In leading support

and advocacy for my company, I feel privileged to work with our customers every day — really getting a hands-on feel for the things they're finding value in and what their pain points are, and being able to drive that information back into the business."

Communicating in an upbeat tone helps to maintain an advocate's interest in providing feedback. "It is important to keep the language used to describe challenges fun and fresh," Naidu notes.



Nicole Naidu
Manager, Customer Advocacy and Support
CloudOn



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CloudOn Finds Creative Ways To Engage Advocates (Cont.)

Getting a sense of what types of challenges your advocates prefer early on gets the relationship off on the right foot. "Then providing a healthy variety of those challenges is a good idea," she says. "Mixing it up with fun, non-business related things that are a little off the wall keeps things exciting."

This all provides a more personalized experience, Naidu notes. "It keeps customers interested and I think it makes them feel like there are actual people with real personalities running the company that makes this product that they love. So my hope is that it makes them feel more love for the

product and more attachment to the company because there is a sense of authenticity."

Exceptional customer engagement helps inspire users to upgrade from the company's free offerings. "More engagement means more usage and dependence, and if a user is dependent on the free product, they may be more likely to need an upgraded feature,"

adds Naidu. "In addition, they are more inclined to tell their friends about a product that they love so much, which would lead to more overall growth for us and potentially more sales of our Pro product. Engagement is good stuff!"



Sustaining Profitable Growth Through Customer Engagement

Customer engagement is the critical factor in profitable growth, Heuer explains. "It's a company's only real source of sustainable, unfair — in a good way — competitive advantage. Ask any software-as-a-service or other company with a recurring revenue stream and they'll be the first to say customer engagement has everything to do with being able to grow faster because you keep what you have and develop customer advocates who are happy to support you."

Engagement builds trust, and buyers are more likely to make additional purchases if they have a positive interaction with your company from the beginning. That revenue can be amplified if you can turn buyers into advocates who are willing to make testimonial videos, participate in research, or post reviews of your product or service on social media.

"Customers who grow confident through delightful engagement experiences will put more trust — and business — in the company who provides these experiences," Zambito says. "In terms of advocacy marketing, influencers can impact new prospects, thus reducing the costs of new customer acquisitions."

Temkin's Lucas notes that loyal customers are willing to purchase additional products and services, reluctant to switch to another provider, and more likely to recommend the company to others. But that's not all. "Loyal customers are also more willing to forgive a company when they make a mistake and trust the company and the information it provides," she says. "All of these outcomes can have a positive impact on the bottom line."



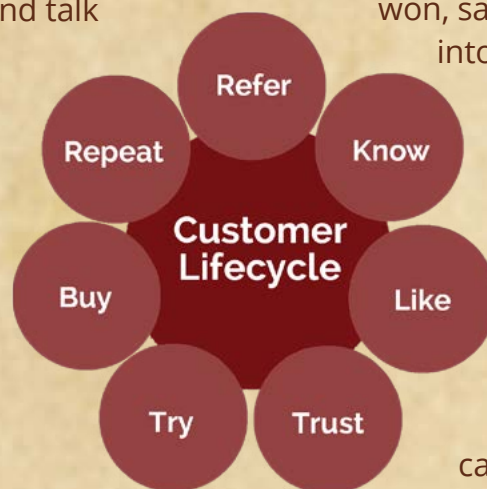


Conclusion: Engaging Customers From The Start

Today's sales cycle is customer-driven, and they are engaging with your company at a number of touch points at their own pace before they pick up the phone and talk to one of your sales people. The sales funnel has evolved, and there are now more effective tactics that can help push prospects through the funnel at every stage of the sales cycle.

Advocate marketing plays a key role in feeding the top of the sales funnel through high-quality referrals. Advocates also influence buyers through social media, content such as case studies,

webinars and in-person events. In the later stages of the buying cycle, advocates provide references to help close deals. Once the business is won, satisfied customers evolve into advocates.



Progressive companies are creating positive interactions for customers throughout the lifecycle. But they don't stop there. They are also putting the framework in place to capture, share and amplify those stages of engagement. It is vital that each step of the process — from the first time that they hear about your company until they become advocates themselves — affirms their choice.

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More than one third of B2B buyers rely on their peers for recommendations more than they did a year ago.



Conclusion: Engaging Customers From The Start (Cont.)

If a customer is passionate about your product or service, it is a win. They'll remain a customer and may even buy more products or services. And since acquiring new customers costs at least five times more than retaining existing customers, improving customer retention is a direct boost to the bottom line.

Getting a loyal customer to take the next step and speak at a conference, write a blog or participate in a case study moves them from fan to advocate. And as more buyers rely on peer input during the decision-making process, you'll need those advocates in your corner.





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About Influitive

Influitive, the advocate marketing experts, helps B2B marketers mobilize their advocates and fans to share their positive experiences across the social web in order to influence buyers. Influitive's innovative AdvocateHub software and Maven mobile app make it fun and exciting for advocates to participate in more referrals, references, success stories, product reviews, survey responses and other promotional content. This approach, called advocate marketing, is proven to generate higher-quality sales leads, accelerate sales opportunities and improve brand recognition. For more information, visit us at: www.influitive.com.

About Demand Gen Report

Demand Gen Report is a targeted e-media publication spotlighting the strategies and solutions that help companies better align their sales and marketing organizations, and ultimately, drive growth. A key component of the publication's editorial coverage focuses on the sales and marketing automation tools that enable companies to better measure and manage their multi-channel demand generation efforts. For more information, visit us at: www.demandgenreport.com.

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