Elevating Our Game and Our Profession: How and Why?

Jeff Ernst @ SlapFive
Howard Fields @ Essential Expertise

October 26, 2020

CustomerX Con 2020

Elevating our Game and our Profession: Why and How?

Monday, October 26 @12 noon - 1pm EST

Co-Founders of the CustomerX Pros Community:

Jeff Ernst
Co-Founder & CEO
SlapFive

Howard Fields
Managing Partner
Essential Expertise LLC

Cindy Aitken
Senior Manager, Customer Advocacy
Ellucian

Dana Alvarenga
Director of Customer Experience
SlapFive

Crystal Anderson
Director, Customer Marketing
Invoca

Nichole Auston
Customer Marketing Consultant
Nichole Auston

Kaily Baskett
Director of Client Services
SlapFive

Kalina Bryant
Head of Customer Advocacy
Asana

Alison Bukowski
Director, Customer Advocacy and Engagement
Optum

David Coates
Director Customer Marketing
Forter

Mary-Leslie Davis
Director of Customer Engagement
Waters Corporation

Jeff Ernst
Co-founder & CEO
SlapFive

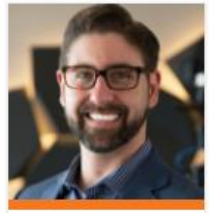
Howard Fields
Managing Partner
Essential Expertise, LLC

Meredith Franks
Senior Principal Consultant
Erdmann Marketing Group

Jeff Gabel
Customer Reference Specialist
ServiceNow

Irwin Hipsman
Customer Success Marketing Manager
Nexthink

Lisa Hoesel
Senior Case Study Manager
Cognizant



Ari Hoffman
Director of Customer Advocacy
Coveo

Evan Jacobs
Director of Customer Marketing
Catchpoint

Bill Johnston
Founder & CEO
Structure3C

Victoria LaPlante
Head of Customer Marketing
Nasuni

Rob Leavitt
Senior Vice President, Consulting
ITSMA

Lisa Nakano
VP & RD: Customer Engagement Strategies
Forrester

Kim Plank
Customer Success Marketing Manager
Acumatica

Heather Pritchett
Director, Customer Voice
OutSystems

Steve Rankel
SVP, Customer Research & Insights
Appfire

Tracy Reusch
Manager, Customer Reference
DXC Technology

Liz Richardson
Co-Founder & Managing Partner
Captivate Collective

Amanda Salem
Manager, Customer Advocacy
Egnyte

Rebecca Salem
Marketing Communications Manager
Achieve3000

Sarah Schreiner
Senior Strategy Analyst, Client Experience
ADP

David Meerman Scott
Marketing Author & Speaker
Author of Fanocracy

Gordana Stok
Buyer Journey Expert
Buyer Journey UX Design

Meaghan Sullivan
Customer Reference Marketing Manager
Google Cloud

Jeanne Talbot
Customer Marketing Director
CloudBees

Barbara Thomas
Sr Advocacy Strategist
Yesler, part of Accenture

Nick Venturella
Customer Engagement Operations Manager
Ceridian

Scott Wilder
Global Head, Customer Engagement & Community
HubSpot

Deena Zenyk
Co-Founder and Managing Partner
Captivate Collective

CustomerX
MISSION
Elevate the impact, influence, and appreciation of our roles,
by connecting our work to strategic growth initiatives,
to make our CustomerX roles a career path to the C-Suite.

“Customer Marketing, when done right, is the most important function in any company.”

FORRESTER®

Jeff Ernst
Principal Analyst Serving CMOs
November 16, 2010
@jeffernst

“Connect your work to the strategic growth initiatives your C-level executives care about, and your C-level executives will care about your work.”

Jeff Ernst
Co-founder & CEO @ SlapFive
October 26, 2020
@jeffernst

What do we mean by Strategic Growth Initiatives?

Activities we care about

- Case studies
- Happy quotes
- Peer reviews
- Testimonial videos
- Reference calls
- Advocacy challenges
- Surveys
- …

Initiatives our execs care about

- Improve retention
- Launch new products
- Move up/down market
- Penetrate a new industry
- Land & expand
- Assimilate acquired companies
- Displace competitors
- …

The traditional role of Customer Marketing

Showcase our customers' successes

The new job description for Customer Marketing

Mobilize our customers to drive our company's strategic growth initiatives

Showcase our customers' successes in ways that build their reputation and help us earn trust in the market

Engage our customers to make them successful and increase customer life-time value

Infuse customer voice into CX

Infuse customer voice into product

Infuse customer voice into every fibre

Gather and represent our customer's voice

Jeanne Talbot

Just promoted to:
Customer Marketing Director at CloudBees

Elevating Our Game

Inspiring Engagement

Leadership & Buy-in

Innovate for Impact

Customer-to-Customer

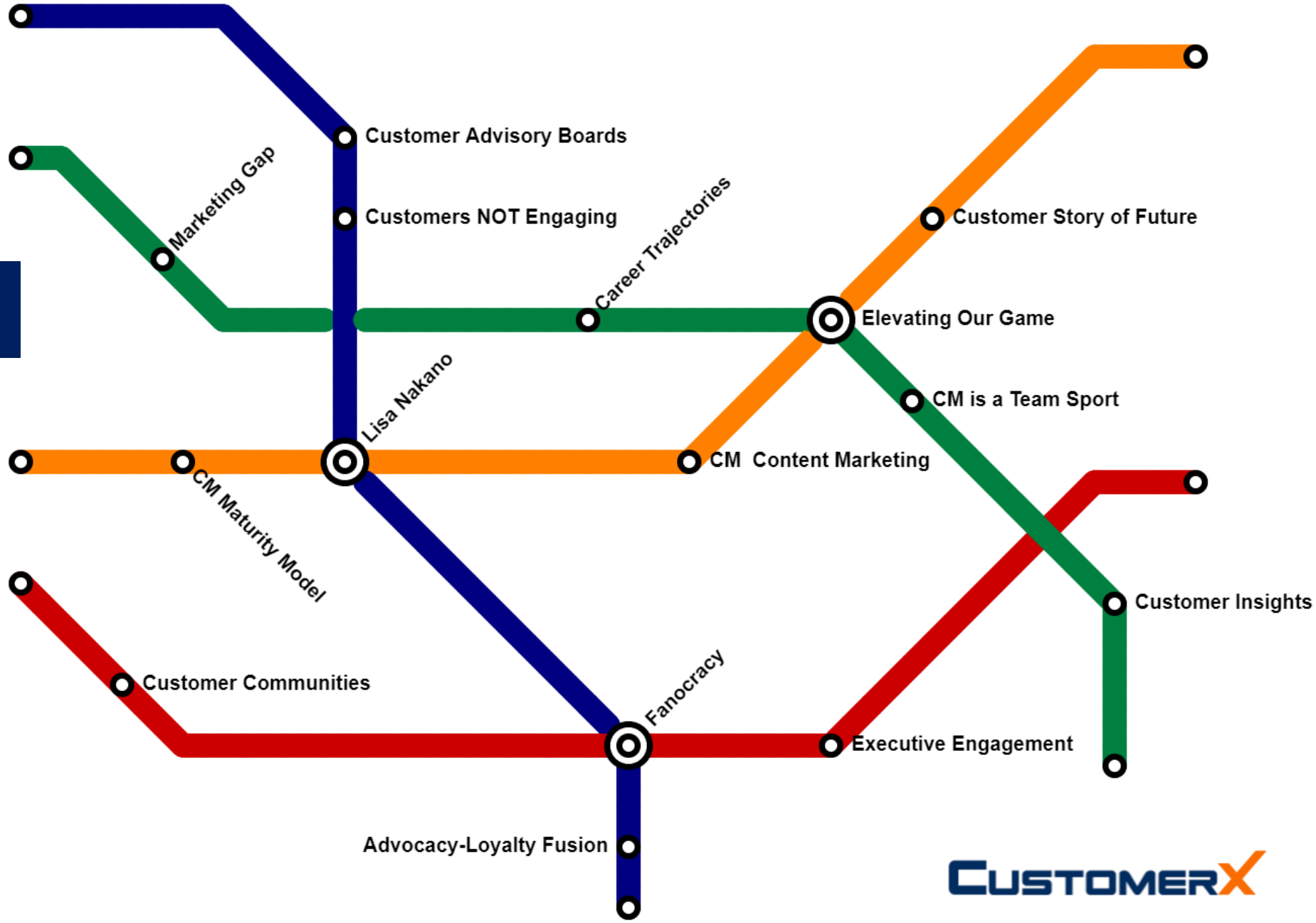
TRAIN TRACKS

Inspiring Engagement

Leadership & Buy-in

Innovate for Impact

Customer-to-Customer



Elevate Your Game

CustomerX

Howard Fields

Managing Partner, Essential Expertise, LLC

Co-CEO, Cognitient Corp.

COO, UnifyImpact Inc.

10.26.20

As digitalization and AI adoption accelerate, the diffusion of customer insight and programs across an organization has never been more consequential. The C-Suite of the future will be led by executives who have proven themselves highly skilled in harnessing this knowledge and effectively deploying it.

Will your situation change you, or will you change your situation?

2020 was a perfect storm.

It accelerated the digital trends that preceded it and is driving permanent behavioral changes in customers and organizations

2020: The Perfect Storm

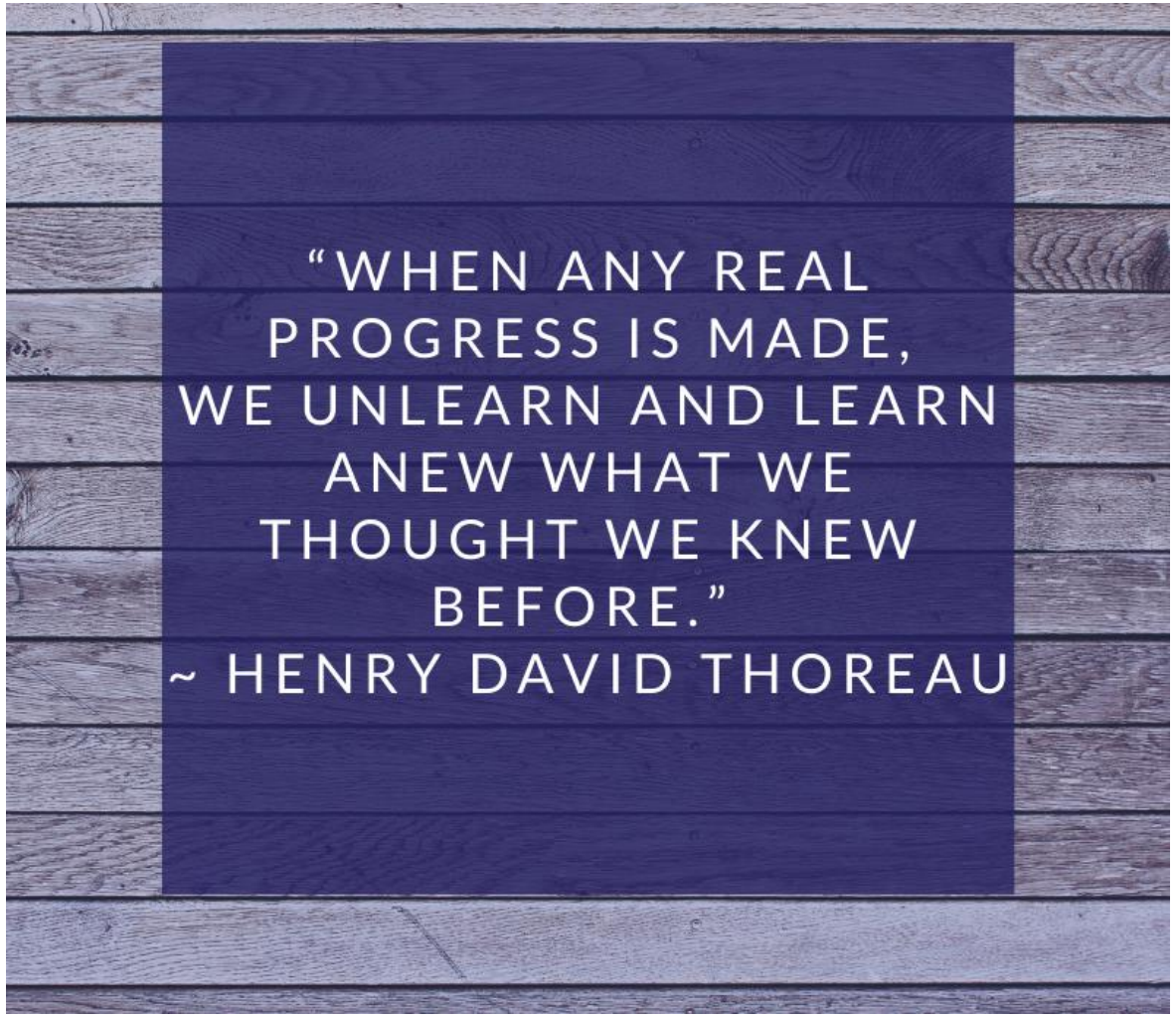
Face to Face

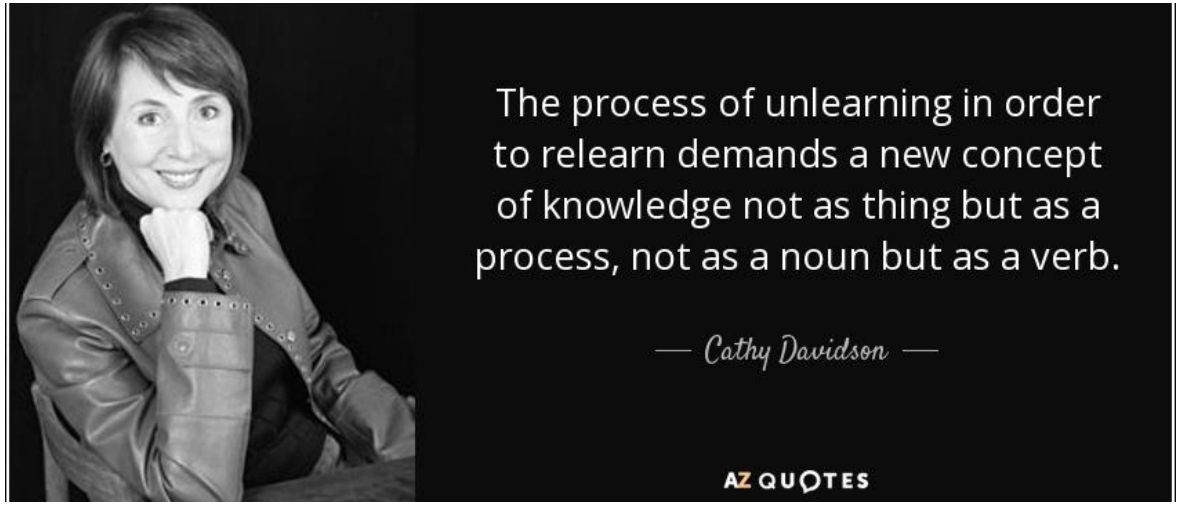
Zoom

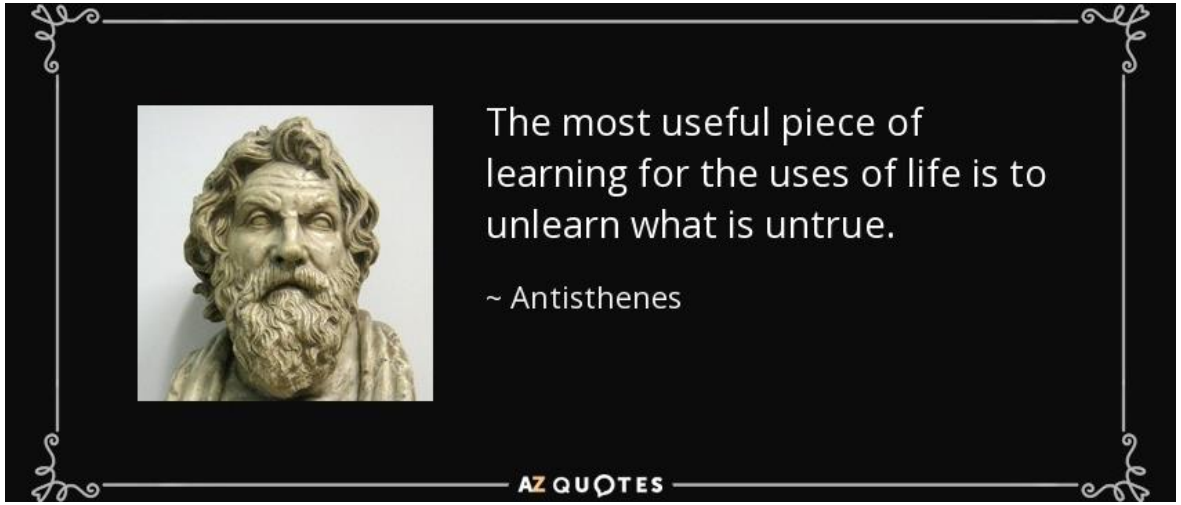
“The illiterate of the 21st century will not be those who cannot read and write, but those who cannot learn, unlearn, and relearn”

~ Alvin Toffler, Future Shock (1970)

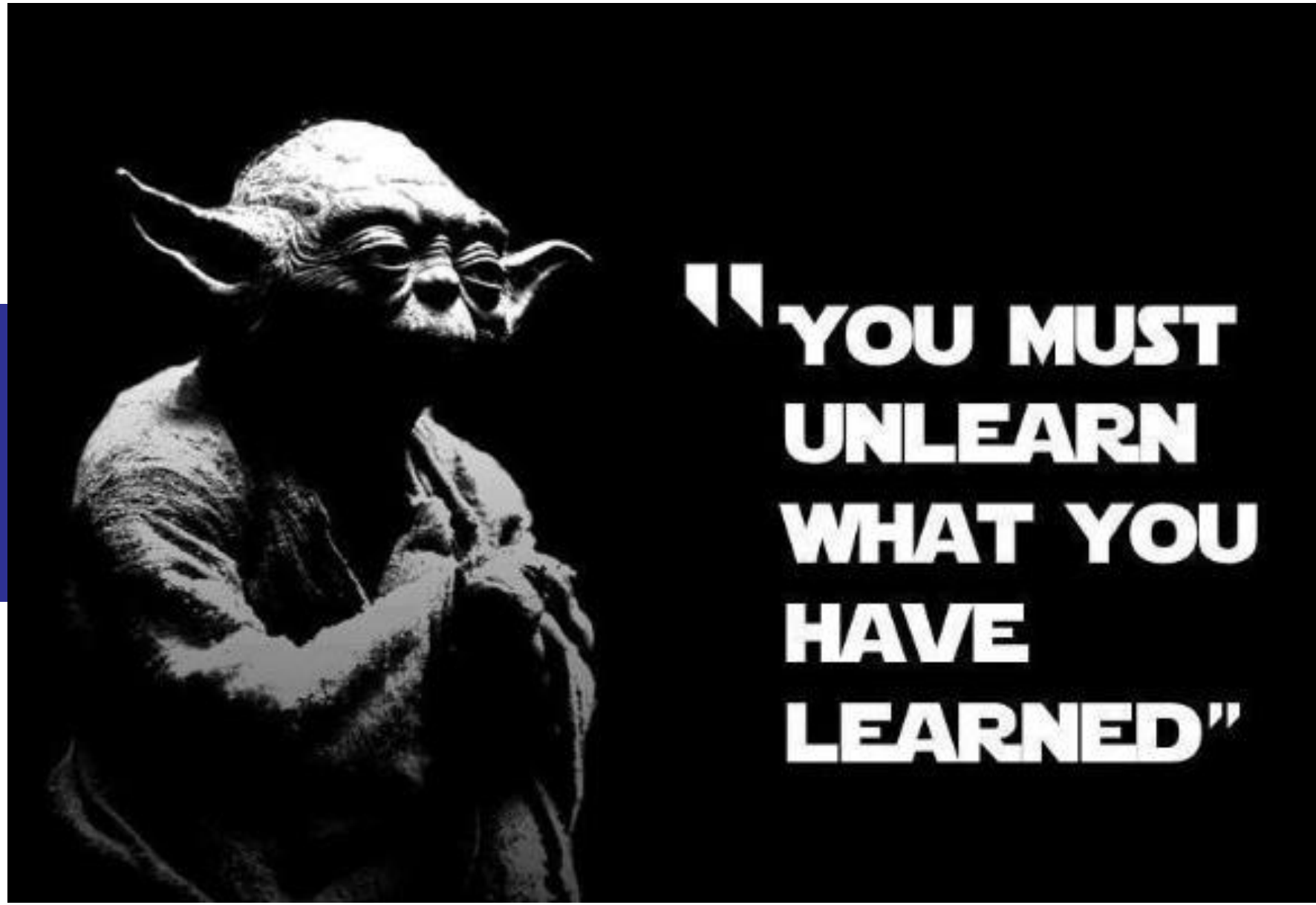
“History never repeats itself, but it rhymes.” ~ Mark Twain







A long time ago, in a galaxy far, far away...



ELEVATE
FORESIGHT
RESULTS
INTUITION
COMMUNITY
INFLUENCE
UNDERSTANDING
GROWTH
PERFORMANCE
KNOWLEDGE
ADVOCACY
STRATEGY
VOICE
CONTENT
MATURITY
GAME
VALUE
LEADERSHIP
PROFESSION
CLARITY
REACH
ADAPTABILITY
TEAM
PERSUASION
RELATIONSHIPS
LOYALTY
INSIGHT
ABILITY
INNOVATION
CONSISTENCY
GROWTH
COMMITMENT
MATURITY
TRAJECTORY
CAREER
PERSPECTIVE
INSPIRATION
OPPORTUNITY
ENGAGEMENT
STATURE
CONFIDENCE
CONVICTION
INITIATIVE
STORY
COURAGE
EXPERIENCE

Customer Marketing Impact Formula

Impact = Opportunity to Excel X Ability to Influence

Opportunity to Excel = (Knowledge + Experience + Performance) X
The % of Work Tied to Strategic Growth Initiatives

Ability to Influence = Degree of Foresight X Degree of Confidence

Survey Responses Follow

How has COVID-19 changed what you're doing in your customer programs this year?

- Video is the main medium we're doing less of. The other is customer speakers for conference sessions
- Shift from virtual events and launch of new virtual roundtables
- More reactionary programs on how to best support customers in their times of need, and more challenges with video case studies.
- Slightly
- Working from home has made it easier to connect with customers. There is a willingness to help and a sense of community that has emerged. Doing a lot more interviews than normal. More frequent CAB meetings.
- Accelerated the need to engage even more with top/high value customers
- No in person events. Not sure how to mail physical things as people aren't in offices.
- Everything is virtual. It definitely was a factor in allowing us to get budget to use SlapFive to capture video recordings, and customers are more willing to engage on recorded Zoom video calls than ever before.
- I continue to obtain solid client stories, however anything beyond a phone interview is not happening.
- No live events.
- Moved everything online
- Annual customer event has gone virtual
- All in-person events canceled, moved some to virtual but not the same quality.
- Need to pivot quickly. More testing and experimenting. It's a brand-new landscape of understanding what matters to our customers in this (brave) new world.
- There are no in-person events, which is hard when trying to build strong, strategic relationships / partnerships.
- Our tech teams have been much more hands on and we've had to pivot and add functionality on the fly. At the same time, our marketing teams have done more to create community and provide information to help our customers without highlighting our software.
- We have made our brand and campaigns more human. Our campaigns have a highly personalized, highly targeted focus. We have moved to show customers we're just as loyal to them as they are to us.
- Switched in-person events to virtual - added many more webinars; reduced printed collateral
- Created the necessity and need to "pivot" and be flexible. In person meetings are no longer an option - at least for the foreseeable future - so we're flexing on how to keep clients engage and maintain our connection with them.
- After the dust settled, my company decided now more than ever, creating a customer community is a key priority. They brought me on to build it out, even though it hadn't been in the budget

How has COVID-19 changed your planning process for 2021?

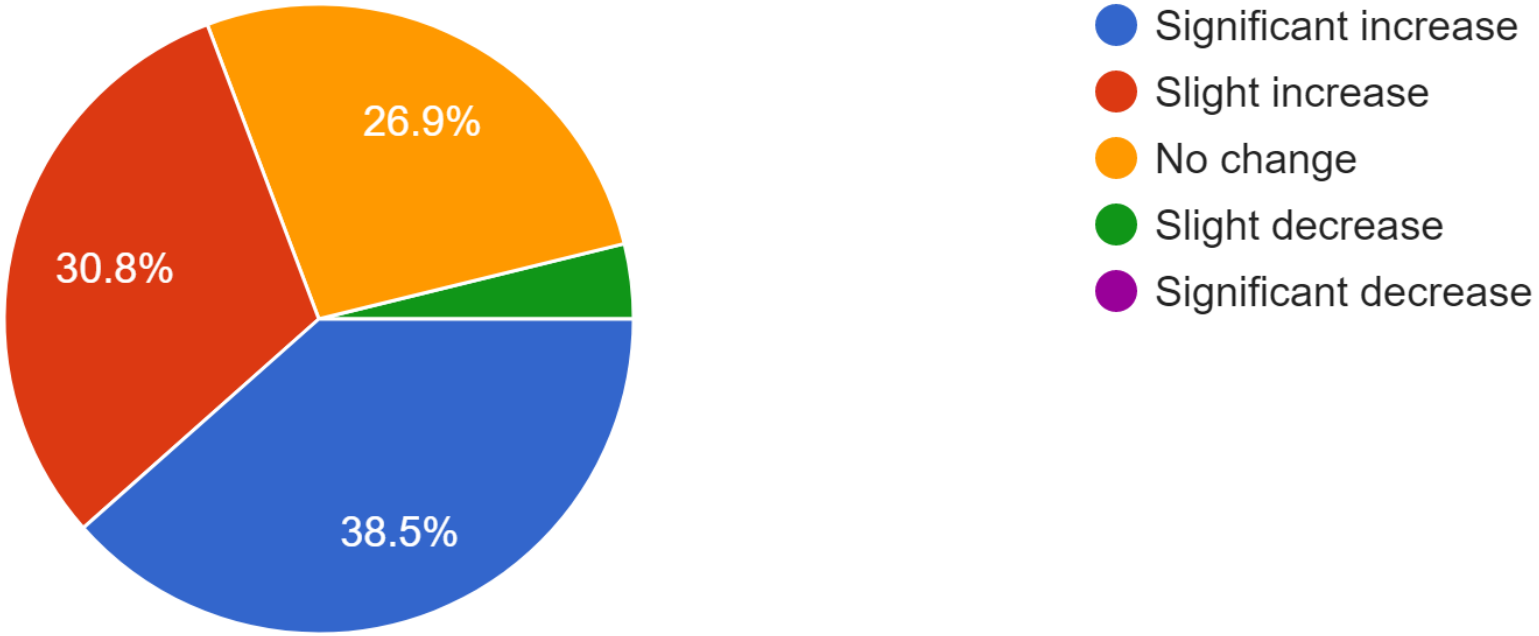
- The planning process remains the same. What we dialed back is videos and speaking sessions for customers.
- Looking to get creative around how to keep engagement virtually
- We are assuming difficulty moving forward into 2021, and want to support our customers, but also scale up and improve strategic programs that have been on the back burner now that there's a bit more breathing room.
- Increased uncertainty.
- Same process.
- More digital events and online community focus
- Planning on no physical events.
- Loss of headcount, leadership strategy directional change
- Still planning for virtual events. We're hosting our first ever, annual virtual global customer conference.
- Client stories have become more important as sales validation tools, we have doubled our goals.
- How are we going to spend marketing dollars if live events are turned virtual in 2021.
- No plans for onsite visits
- We do all of our 2-21 planning on Zoom calls.
- Further investment in VoC and Customer Marketing given that in this climate, customers have less patience for anything short of stellar CX.
- Hard to plan for any on-site events and in-person events. And, there are a TON of virtual events that we are all being asked to attend. It is overwhelming.
- Well, definitely a lower budget moving into 2021. We are weighing who is physically in the office, what is the best way and frequency to communicate? How can we delight our customers without seeing them in person at events? Can we even send them a physical mailer? The majority of the 2021 plan will be digital and we will be exploring new ways to contribute to virtual conferences.
- We have taken a look at what could potentially be happening to get ahead. Which means optimizing our customer journey to respond to our customers' new problems caused by: Fear, Isolation, Physical Distancing, and Financial Constraints. We've created a customer-centric directional matrix that addresses each of the above problems and have different customer marketing strategies set up.
- Looking for more innovative digital opportunities
- Having to re-think onsite meetings and travel

What are you planning to do differently in 2021?

- My company is a startup with very little of everything (content, process, tools, etc.). Next year we plan to go big with a few customers stories and push more on usage of customer stories vs. just doing more of them.
- Find new/creative ways to keep engagement high (hope to get some ideas next week!)
- More remote video
- Scale advocacy and loyalty efforts.
- We are planning more COVID-focused customer communications
- Scale and target audiences more precisely
- We will be doing more video, I think, but we will need to significantly improve the quality and consistency. More time to think through and prepare for online conference participation from customers. Much more focus on reducing churn.
- Drive a non-product focused community strategy
- Virtual user groups/CABs
- Engage more with customers on recorded Zoom calls to capture more video interviews and customer voice (audio and/or video). Previously, we struggled with budget and resources to travel to do expensive video shoots (which are still very nice to have), but in today's new reality, the more natural, though lower quality video, is widely accepted.
- Consider new tools to capture recorded interviews and videos.
- Continued effort to gain organizational buy-in.
- More virtual customer events
- More virtual events, new rewards program, more mentorship
- Many more virtual events, direct mail and focus on the customer as renewal/expansions will be more important than ever.
- Expand VoC
- Strategically changing our goals to focus more on the customer journey.
- The majority of the 2021 plan will be digital and we will be exploring new ways to contribute to virtual conferences. We are also planning to welcome videos for new customers and new user training videos.
- Optimize customer journey to include micro-moments to continue to understand what drives and motivates our customers and support our customer needs first.
- More focus on customer web experience
- Still in planning phase...
- Create stronger customer relationships, focused on driving success for them

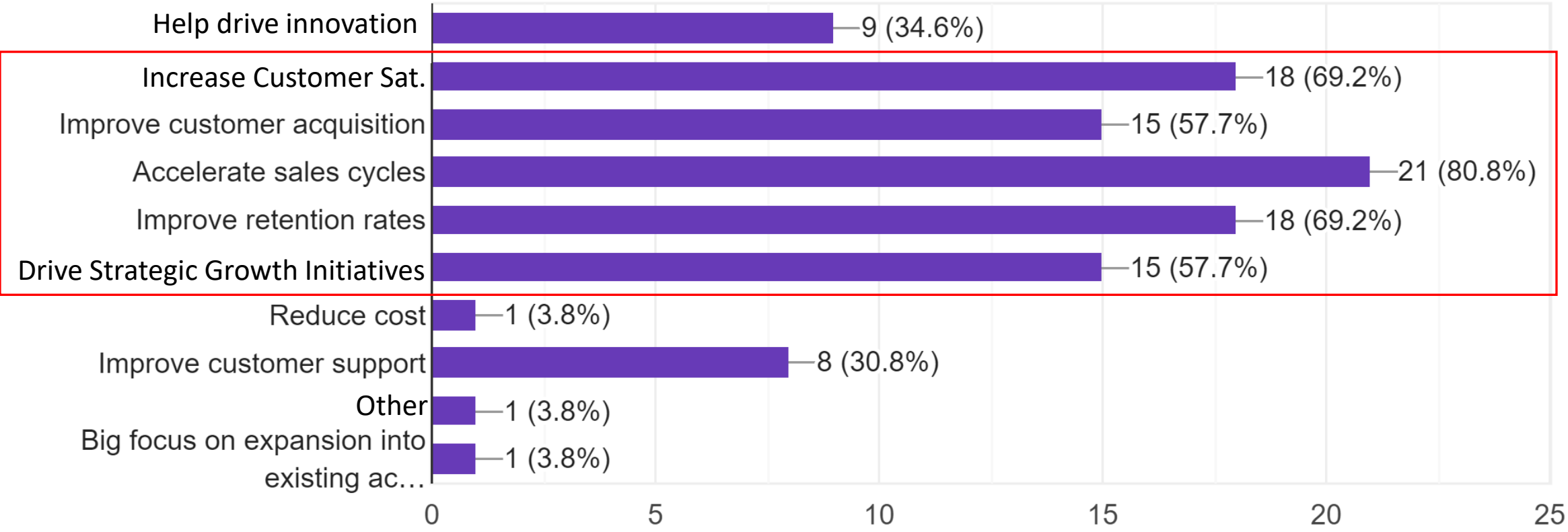
How has executive interest and involvement in customer programs changed in 2020?

26 responses



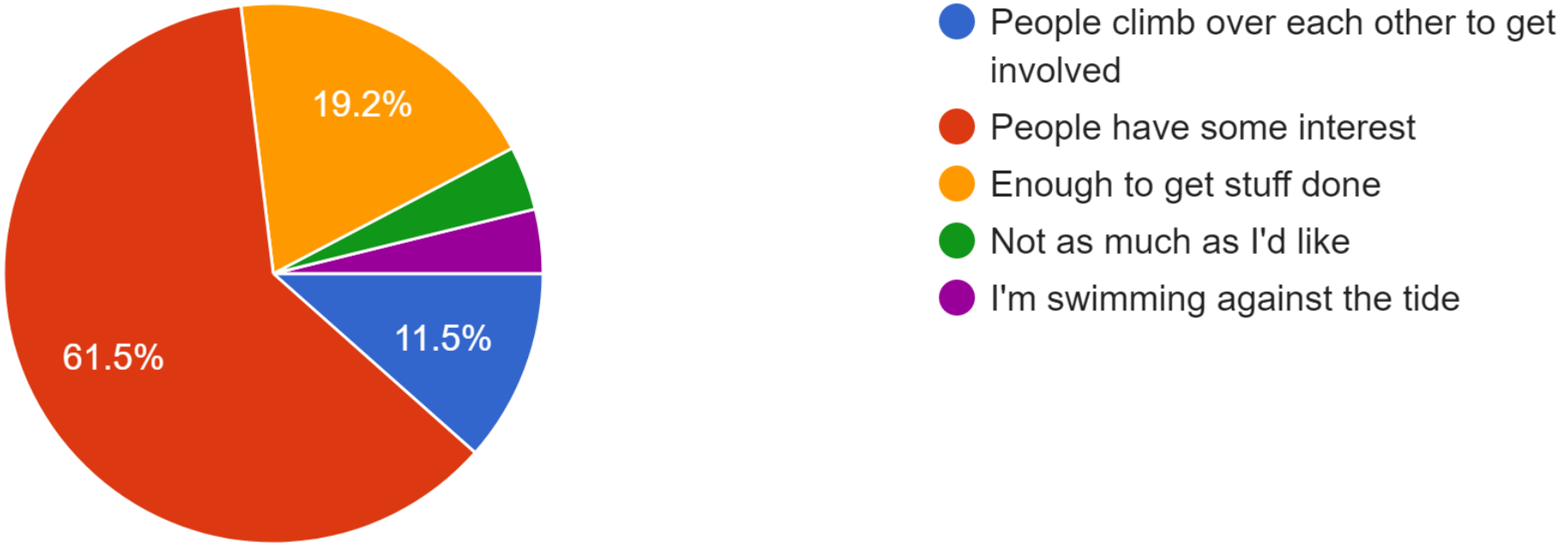
How would you categorize the nature of the outcomes your C-level executives expect from your customer programs? (check all that apply)

26 responses



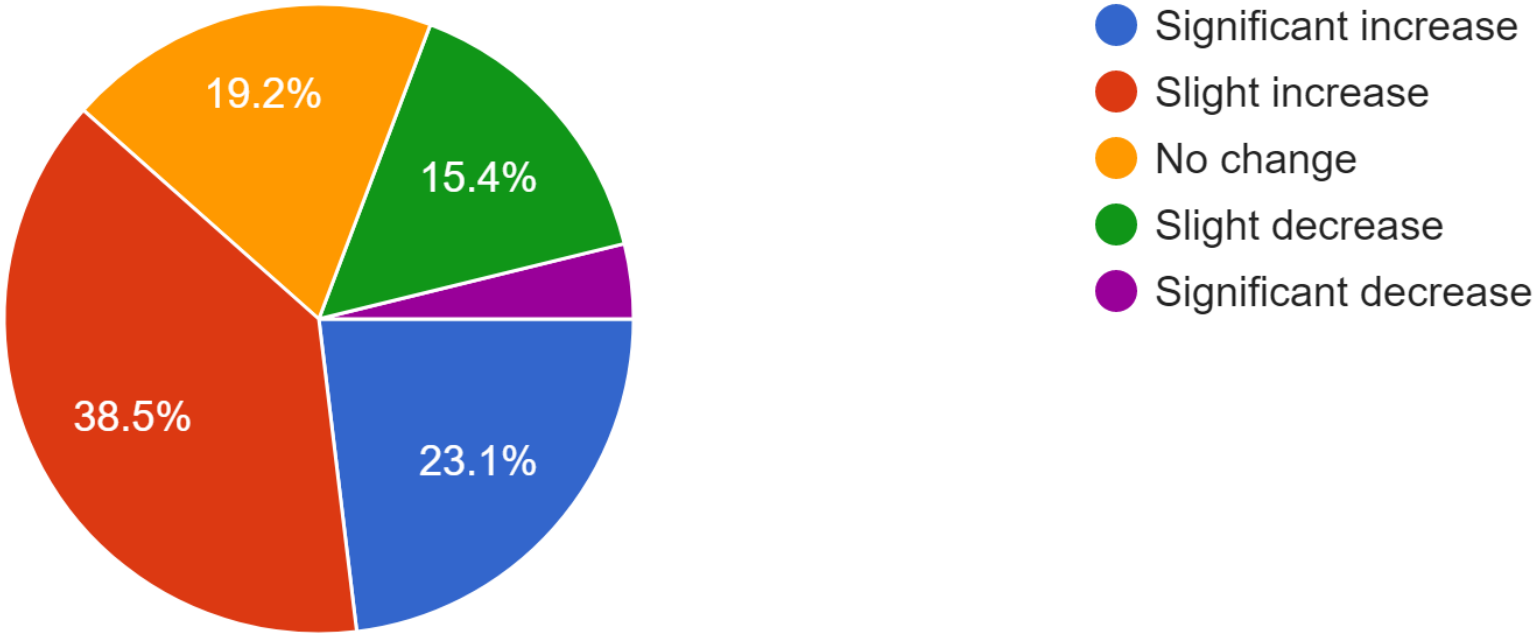
How much buy-in and collaboration do you get from people in your organization today?

26 responses



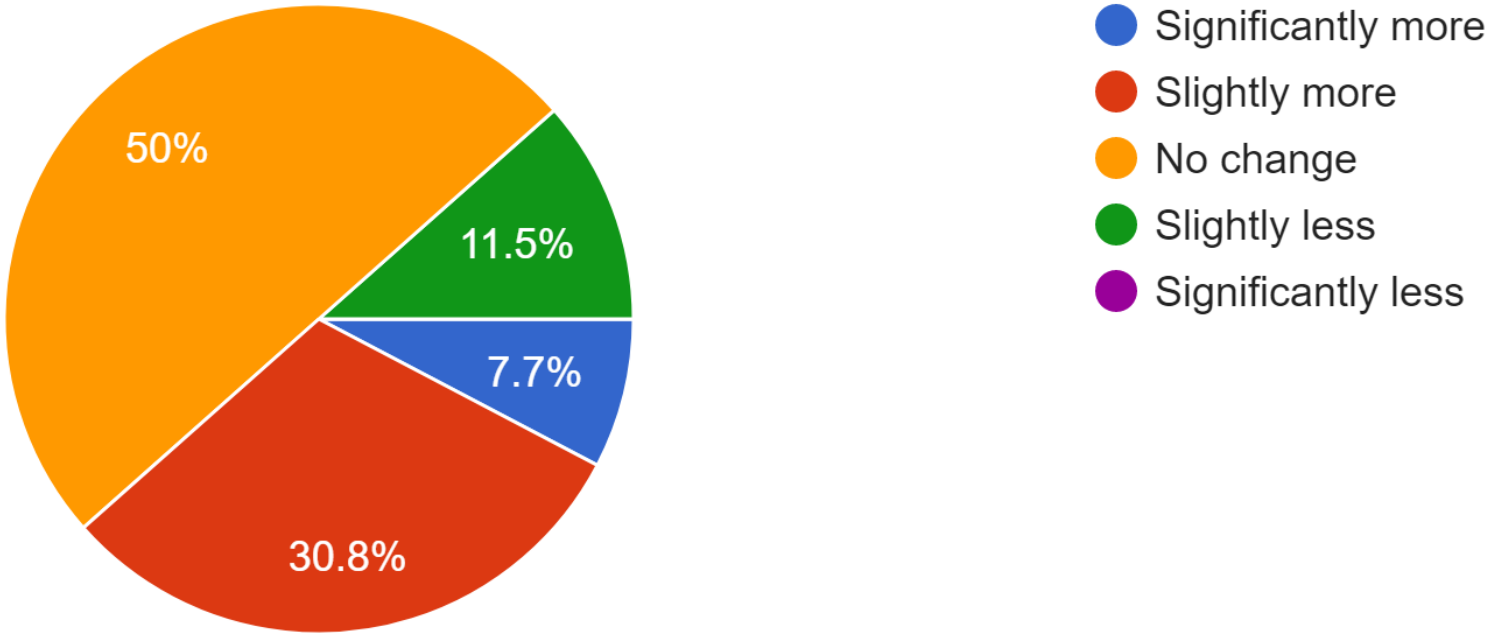
How has the level of customer willingness to participate in your programs changed this year?

26 responses



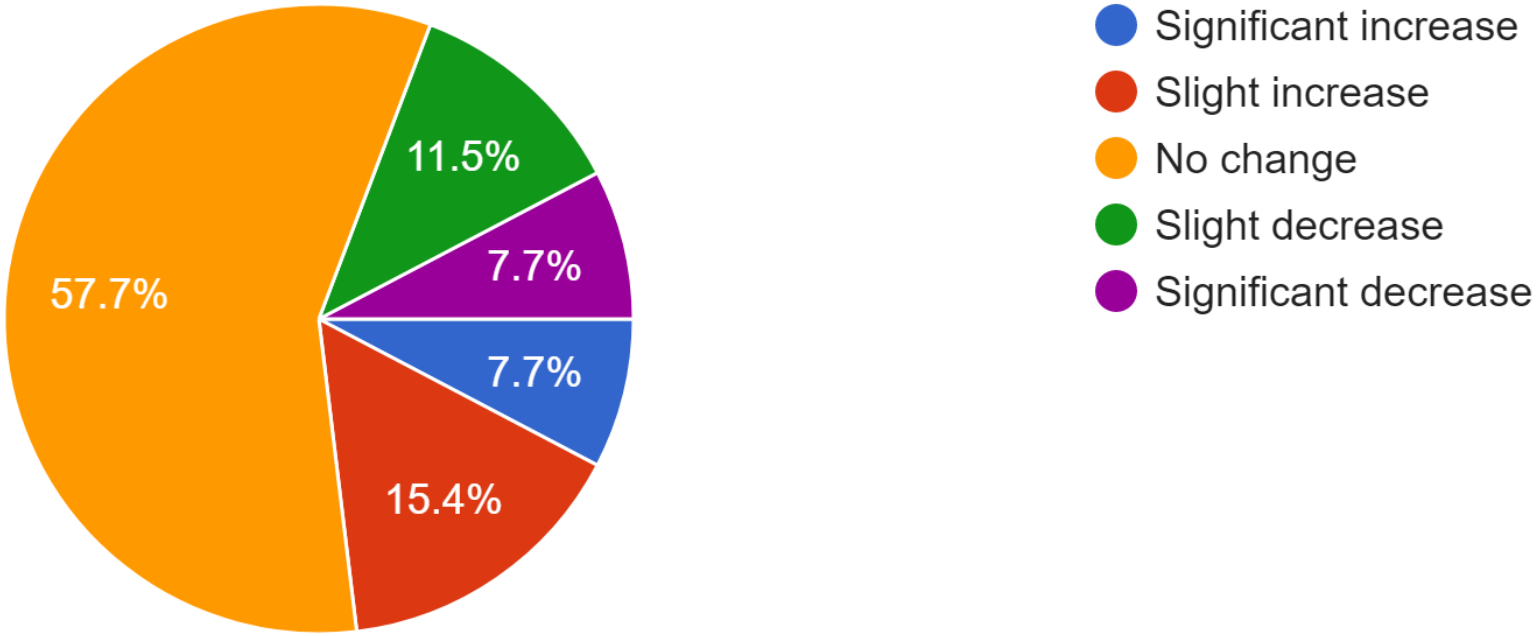
To what degree are your customers more or less forthcoming in the customer stories they are sharing with you?

26 responses



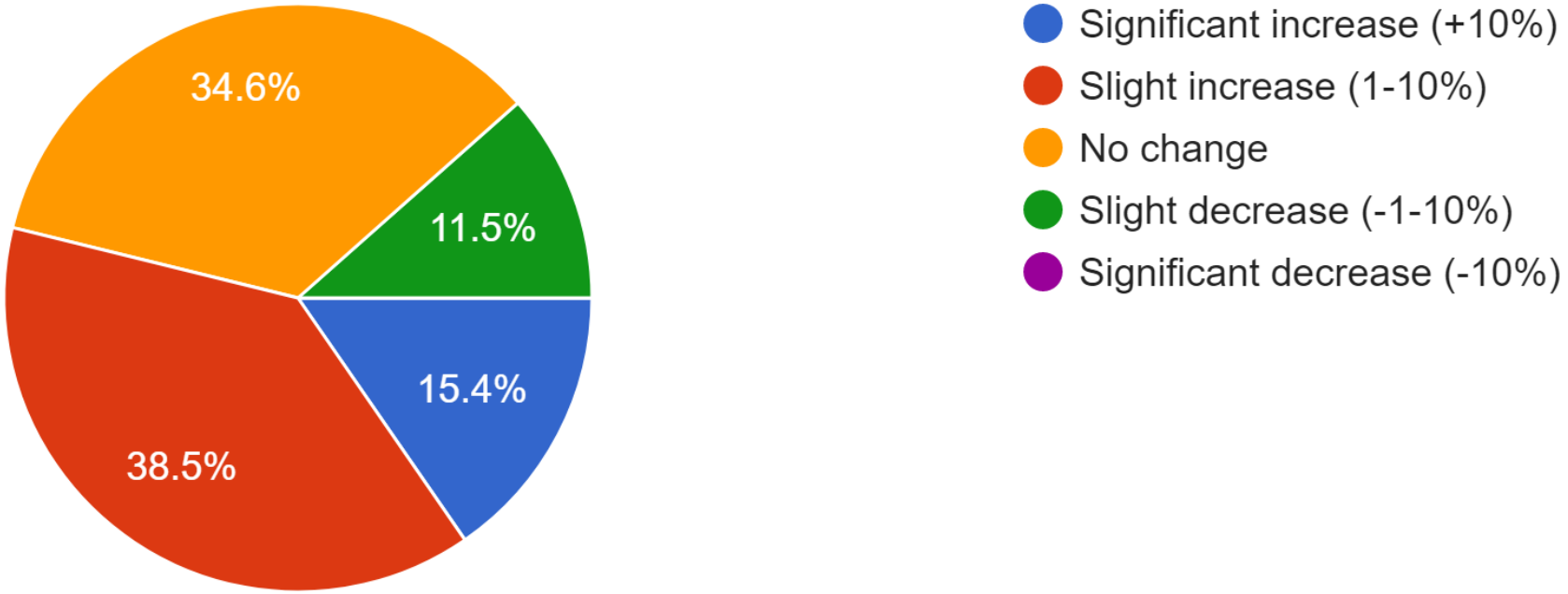
How has your customer programs budget changed in 2020?

26 responses



How do you expect your customer programs budget to change in 2021?

26 responses



What are the key points in your business case to keep or increase your budget or other resources in 2021?

- The impact which can be made with the proposed budget
- Impact to revenue this year and need to meet CRO asks for sales enablement
- Key stats on word of mouth and advocacy, proof of success from early efforts
- Repeatable impact on customer metrics
- Upsell pipeline growth quarter over quarter and year over year; Impact on new business pipeline
- Business scale
- Reducing churn
- Expansion into community to drive NRR/GRR and install base marketing
- Retention, Loyalty
- Ongoing interest in building the program at exec level, create more stories than this year.
- TBD
- Land and expand strategy requires shared knowledge of customer successes
- Better customer experience with advocacy
- Big shift to virtual events will allow us to do more and reach more customer
- Programs Increase Adoption > Increased Adoption Reduces Churn / Expands Upsells / Closes Deals with Social Proof / Generates Demand with Referrals & Online Sentiment
- Need solid metrics that show adoption, retention & expansion
- We need to understand where our customers are at and how to best serve them. We need to keep the budget where it is for the time being, but once things start to pick up some more, we need to actually increase our budget so that we can grow our customer programs and add better analytic tools.
- Creating the customer-centric strategy matrix has been a huge help in identifying the need for an increase in budget.
- Need for better targeting

What's one capability or tool that if you had it, would increase the value you could deliver with your customer programs?

- The impact customer content is making
- Tech Validate
- Easier way to execute case studies and swag delivery in a Covid/remote world.
- SaaS-enabled products/improved telemetry
- Centralized DB
- Clone myself. LoL. I honestly have access to everything I need.
- Centralized customer data set and alignment of engagement platform
- Comprehensive visibility into customer health
- A mini me. I need someone to help with the admin of the program.
- Reference program tool. Formal training on customer engagement
- Venue, to bond
- Complete customer marketing platform (advocacy and reference management)
- Marketing automation
- A working customer management solution tool and tracking software. Our current database is not working properly.
- Currently, we have too many different places that we house customer information and they do not communicate at all. If there was a way to pull information from all sources to keep accounts accurate, that would make all of our customer marketing programs extremely effective.
- Potentially a customer community, but I'm not sure we have the customer base yet to support it.
- Marketing automation (just implementing it now)

What's one question you want to have your peers answer during or after the conference?

- What is a new medium you are working on to share customer stories?
- How do you deal with others in your company (execs) who use false/made up customer data points in marketing presentations? This is a new challenge for me.
- How are you building community in a remote first world? What new, creative approaches are you taking?
- How to get joint buy-in for customer programs in a decentralized marketing environment?
- How do you get other departments to engage more fully and leverage customer content? What's your sales enablement strategy?
- Who owns community and how can it be more than just product/support focused?
- I have two: How to stay top of mind to continue to recruit new client names? How to motivate national sales to share names?
- Is your customer portal part of your customer engagement program? When/how do to scale to include?
- How to get around gatekeeper(s)?
- How are you handling global rewards (i.e. swag, gift cards, physical items) in other countries and comply with tax and reporting requirements that differ by country?
- Where does customer marketing sit within the organization and do you feel it aligns well to that team/departmental goals? We are considering a change for 2021.
- How do you measure success of your Customer program?
- How involved are your product development teams in your customer engagement programs?
- Where do you see customer marketing headed in 2021? Anything with upcoming trends around the dynamic environment we're living in.
- How have you driven peer-to-peer connections in a scalable fashion?

As digitalization and AI adoption accelerate, the diffusion of customer insight and programs across an organization has never been more consequential. The C-Suite of the future will be led by executives who have proven themselves highly skilled in harnessing this knowledge and effectively deploying it.

Thank You