

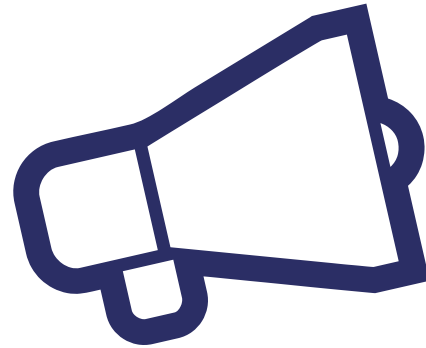


# Advocacy & Retention: Correlation or Causation



**Brittany Pais**  
VP, Customer Experience

Lytho™



# Agenda

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**01**

Why Focus On Advocacy?

**02**

Where We Started – And How We Have Phased Our Approach

**03**

What Gets Measured Gets Managed

# Simplifying Creative Operations

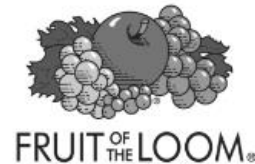
Better Process. Better Outcomes.

Learn More



Trusted by 600+ Global Brands

Read Success Stories



# Our CX Mission at Lytho

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Our mission is to deliver outcomes-focused, value-enriched experiences **that customers want to have again** – to earn the right to customer-driven growth!

#lytholove

# Core CX Tenets

1

2

3



4

5

**Focus on  
Customer  
Outcomes**

**Reduce  
Customer  
Effort**

**Nurture  
Product  
Adoption &  
Expansion**

**Turn  
Adopters  
Into  
Advocates**

**Hear & Share  
The Voice of  
the  
Customer**

# What is Advocacy?



—

Any positive comment that a customer makes to another person outside of their organization.



POLL

## Who Owns Advocacy At Your Organization?

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- Customer Success
- Marketing
- Product
- Sales
- It doesn't have an owner...



# Customer Success Lifecycle



“ There are only two metrics that I want to be measured on as a Chief Customer Officer...

NRR  
&  
Advocacy

- Wayne McCollough  
*Author, The Seven Pillars of Customer Success*

# Why CX Should Own Advocacy

Obsession  
With  
Outcomes

01



02

Broadcasting  
the Voice of the  
Customer

Risk Mitigation

03

04

Loyalty &  
Retention

# Where We Started...

# Pure Chaos



No defined sales reference, case study, or event processes



“Bothering” the same customers again & again



No ability to track metrics or outcomes



# 1. Admit You Have Problems

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Take a step back and document the pain – and what your dream future state might look like from each team



## 2. Commit to Documenting Advocacy

### Advocacy Event Types

- Knowledge Exchange
- Analyst Interviews
- Speaking Engagements
- Blog/Case Study
- Sales Referral
- Public Review
- Social Post

New Activity

Note \*

Apply Template

Enter notes and @mention users

Tasks

Add Task

Activity Type

Advocacy

Company/ Relationship \*

Search Companies and Relatio... Q

Subject \*

Enter text

Activity Date \*

4/7/2023 4:10 PM

Advocacy Event Type \*

Select

Knowledge Exchange

Analyst Interview

Speaking Engagement

Blog/Case Study

Sales Referral

Public Review

B I U [List Icons] [Link Icon] [Quote Icon]

Discard Log Activity

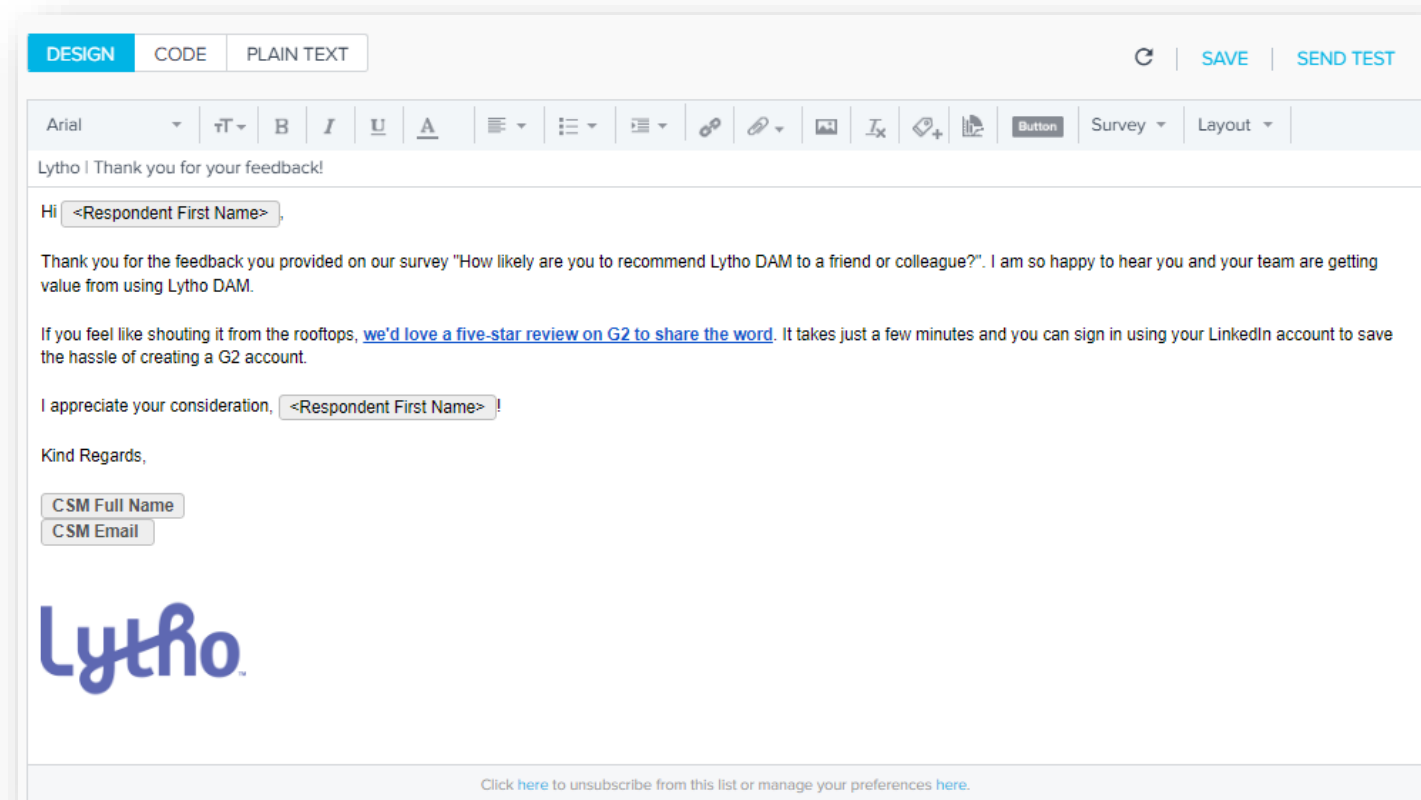


# 3. Build Advocacy into Customer Milestones

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## Advocacy Prompts

- Promoter NPS
- Expansion & Renewal Negotiations
- Risk Playbooks
- Successful SBRs
- Promotions, Rebrands, & Awards





## 4. Partner with Marketing for Events & Content

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- Industry white papers & reports
- Case studies
- Targeted verticals
- Webinars and round tables
- Customer conference

# 5. Build an Advocacy Dashboard

- Democratize advocate data across your organization!
- Put this in a location that is shared or push out updates

Company *	CSM	Industry	Segment	Tenure in Years	Product Package	Health Score	Average NPS	Likelihood to Renew	Users	ARR	Events in Last 180 Days	Customer Reference Level
Alkermes	Travis Basso	Industrial Conglomerates	Business	5.8	ignite	96	10	75	5	USD 10,763	N/A	Public
Amgen	Greg Hill	Chemicals	Enterprise	7.3	ignite	84	10	75	32	USD 53,019	N/A	Permission Required
Amgen	Greg Hill	Diversified Consumer Services	Business	1.5	ignite	92	9	75	6	USD 11,601	N/A	Public
Amgen	Greg Hill	Pharmaceuticals	Business	5.7	ignite	80	8	75	13	USD 15,555	N/A	Public
Amgen	Travis Basso	Leisure Products	Business	4.3	DMU	92	8	75	0	USD 10,056	N/A	Permission Required
Amgen	Travis Basso	Diversified Telecommunication ...	Business	7.8	ignite	93	10	100	6	USD 9,600	N/A	Public
Amgen	Travis Basso	Not For Profit	Business	4.4	ignite	96	10	75	13	USD 10,056	N/A	Permission Required
Amgen	Travis Basso	Insurance	Enterprise	5.1	ignite	92	9	75	6	USD 9,600	N/A	Permission Required
Amgen	Travis Basso	Insurance	Enterprise	2.1	ignite	92	9	75	13	USD 21,070	N/A	Permission Required
Amgen	Travis Basso	Education Services	Enterprise	2.1	ignite	84	10	100	39	USD 71,364	1	Public
Amgen	Travis Basso	Hotels, Restaurants & Leisure	Business	2.1	ignite	100	N/A	100	5	USD 0	N/A	Permission Required
Amgen	Travis Basso	Leisure Products	Business	6.8	ignite	98	N/A	100	18	USD 6,260	N/A	Permission Required
Amgen	Travis Basso	Electrical Equipment	Team	10.5	ignite	98	N/A	100	9	USD 12,971	N/A	Permission Required
Amgen	Travis Basso	Health Care Providers & Services	Enterprise	5.4	ignite	83	N/A	100	12	USD 12,570	N/A	Public
Amgen	Travis Basso	Food Products	Enterprise	7.9	ignite	81	10	75	10	USD 7,959	N/A	Public
Amgen	Travis Basso	Professional Services	Business	5.4	ignite	95	9	75	7	USD 7,959	N/A	Public
Amgen	Travis Basso	Professional Services	Team	5.5	ignite	95	9	100	7	USD 10,500	1	Permission Required
Amgen	Travis Basso	Not For Profit	Business	7.6	ignite	89	N/A	75	86	USD 134,761	N/A	Permission Required
Amgen	Travis Basso	Consumer Discretionary	Business	8.2	ignite	94	10	75	12	USD 29,799	N/A	Permission Required
Amgen	Travis Basso	Health Care Providers & Services	Business	6.2	ignite	93	10	75	6	USD 5,925	N/A	Public
Amgen	Travis Basso	Leisure Products	Business	5.3	ignite	93	10	75	11	USD 13,244	N/A	Public
Amgen	Travis Basso	Business	Business	9.5	ignite	91	8	75	8	USD 10,800	N/A	Public
Amgen	Travis Basso	Business	Business	7.6	ignite	91	9	100	10	USD 17,730	N/A	Permission Required
Amgen	Travis Basso	Business	Business	8.7	ignite	87	10	100	27	USD 51,376	N/A	Public
Amgen	Travis Basso	Business	Business	8.7	ignite	87	10	100	15	USD 21,849	N/A	Permission Required
Amgen	Travis Basso	Business	Business	8.7	ignite	87	10	100	17	USD 21,849	N/A	Permission Required

## 6. Maximize Every Tool In Your Stack

### Slack

- #customer-stories
- #cx-marketing-mindmeld
- #cx-sales-mindmeld for referral requests

### Zoom

Focused storytelling of customer use cases and successes for CX, Marketing, Product, & Sales

### Lytho

Planning events/content + proofing to ensure customer quotes are approved internally and externally

### 15Five

CSMs have individual advocacy goals each quarter



Lytho.



Lytho.



# What Gets Measured Gets Managed...

# Building an Advocacy Dashboard

## Filter customers by:

- Health Score >80
- Stage = Success
- Likelihood to Renew >=75
- NPS = 9,10, or null
- <=1 advocacy event within the last 180 days
- Certain product packages
- Opt-out = false

The screenshot shows a dashboard titled "[00] Advocacy Event Candidates" with a table of customer data. The table has columns for Company, CSM, Industry, Segment, Tenure in Years, Product Package, Health Score, Average NPS#, Likelihood to Renew, Users, ABR, Events in Last 180 Days, and Customer Reference Level. The table is filtered to show customers with Health Score > 80, Stage = Success, Likelihood to Renew >= 75, NPS = 9, 10, or null, <= 1 advocacy event within the last 180 days, certain product packages, and Opt-out = false.

Company #	CSM	Industry	Segment	Tenure in Years	Product Package	Health Score	Average NPS#	Likelihood to Renew	Users	ABR	Events in Last 180 Days	Customer Reference Level
10000000000000000000	Tyler Reiser	Industrial Conglomerates	Business	5.8	ignite	96	10	75	5	USD 10,743	None	Public
10000000000000000000	Mike Appenweiser	Chemicals	Enterprise	7.3	ignite	84	10	75	32	USD 53,019	None	Permission Required
10000000000000000000	Emily Hill	Diversified Consumer Services	Business	1.5	ignite	82	9	75	4	USD 11,601	None	Public
10000000000000000000	Bill Hill	Pharmaceuticals	Business	5.7	ignite	80	8	75	13	USD 15,555	None	Public
10000000000000000000	William Beall	Leisure Products	Business	4.3	DAM	82	None	100	0	USD 10,056	None	Permission Required
10000000000000000000	Travis Baska	Diversified Telecommunication...	Business	7.8	ignite	93	10	75	4	USD 8,600	None	Permission Required
10000000000000000000	Michelle Rizzo	Not for Profit	Business	4.4	ignite	96	10	75	13	USD 21,070	None	Public
10000000000000000000	Michael Remy	Insurance	Enterprise	5.1	ignite	82	9	100	39	USD 71,364	1	Permission Required
10000000000000000000	Michael Remy	Insurance	Enterprise	2.1	ignite	84	None	100	5	USD 0	None	Permission Required
10000000000000000000	Michael Remy	Insurance	Enterprise	2.1	ignite	100	None	100	18	USD 6,260	None	Permission Required
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10000000000000000000	Travis Baska	Hotels, Restaurants & Leisure	Business	6.8	ignite	96	None	100	12	USD 12,570	None	Public
10000000000000000000	Bill Hill	Leisure Products	Team	10.5	ignite	83	None	75	10	USD 7,989	None	Permission Required
10000000000000000000	Michael Remy	Electrical Equipment	Business	5.4	ignite	81	10	75	7	USD 10,500	1	Permission Required
10000000000000000000	Michael Remy	Health Care Providers & Services	Enterprise	7.9	ignite	95	9	100	86	USD 134,761	None	Permission Required
10000000000000000000	Emily Hill	Food Products	Business	5.4	ignite	95	None	75	12	USD 29,799	None	Public
10000000000000000000	Shirley Fey	Professional Services	Team	5.5	ignite	89	10	75	4	USD 5,825	None	Public
10000000000000000000	Bill Hill	Professional Services	Business	7.6	ignite	94	10	75	11	USD 13,244	None	Public
10000000000000000000	Bill Hill	Not for Profit	Business	8.2	ignite	93	10	75	8	USD 10,800	None	Permission Required
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10000000000000000000	Bill Hill	Health Care Providers & Services	Business	5.3	ignite	91	8	100	27	USD 51,376	None	Permission Required
10000000000000000000	Tyler Reiser	Leisure Products	Business	9.5	ignite	91	9	100	15	USD 21,869	None	Permission Required
10000000000000000000	Emily Hill	Berkeley	Business	7.6	ignite + DAM	87	10	100	10	USD 41,411	1	Permission Required

# Benefits of an Advocacy Dashboard



## Reference “Self-Service”

Marketing & Sales can now research customers by industry, size, & location and find the best fit ahead of asking CS



## More distributed asks

Customers leave the dashboard after participating in 2 events over the last 180 days



## Customer Opt-Outs

CSMs have jurisdiction over allowing customers to remain on the dashboard

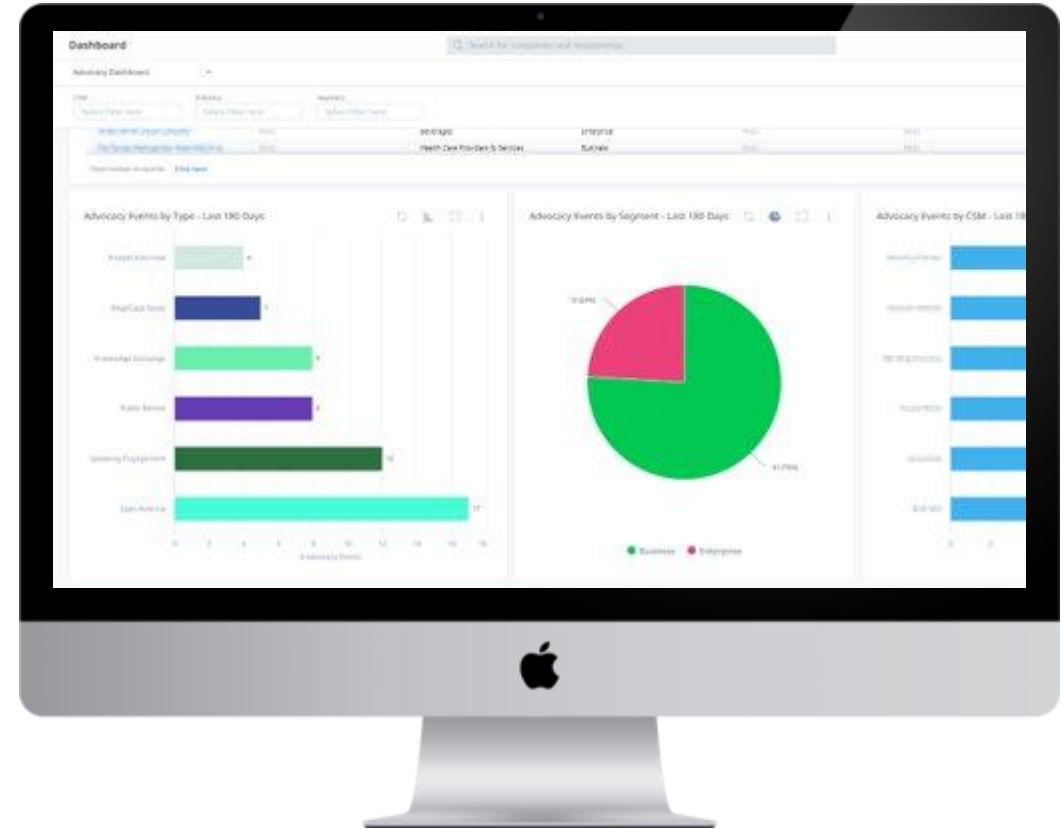


## Measure What Matters

Advocacy progress is tracked and trends analyzed QoQ

# Data Points to Measure

- Advocacy Events By Type
- Advocacy Events By Segment
- Advocacy Events by CSM
- Advocacy \$ARR Influenced





Advocacy Event In  
Last 12 Months =  
100% Retention

# Advocacy & Retention: Correlation or Causation?

# Key Takeaways

- Document your events!
- Build advocacy throughout the lifecycle
- Democratize your data
- Goal, measure, and iterate

# Questions?