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Advocacy & Retention: Correlation or Causation



Brittany Pais VP, Customer Experience



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Agenda

01

Why Focus On Advocacy?

02 Where We Ha

Where We Started – And How We Have Phased Our Approach



What Gets Measured Gets Managed



Solutions v

Resources v Company

Careers v

Schedule a Demo

Simplifying Creative Operations

Better Process. Better Outcomes.

Learn More



Trusted by 600+ Global Brands

Read Success Stories



De**Nederlandsche**Bank EUROSYSTEEM





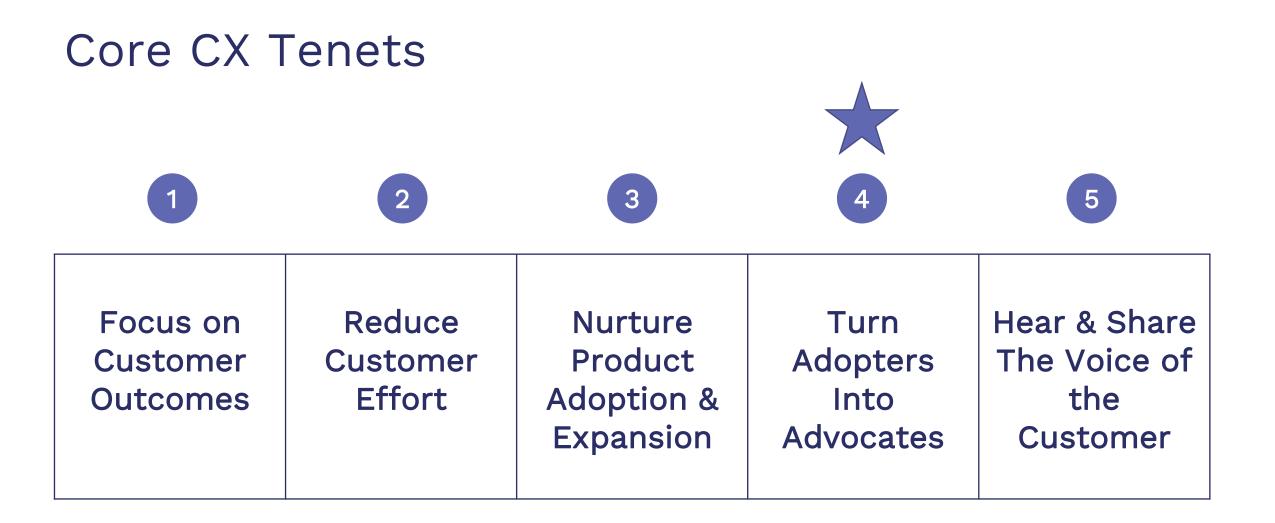


Our CX Mission at Lytho

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

#lytholove







What is Advocacy?

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

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Who Owns Advocacy At Your Organization?

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



Customer Success Lifecycle



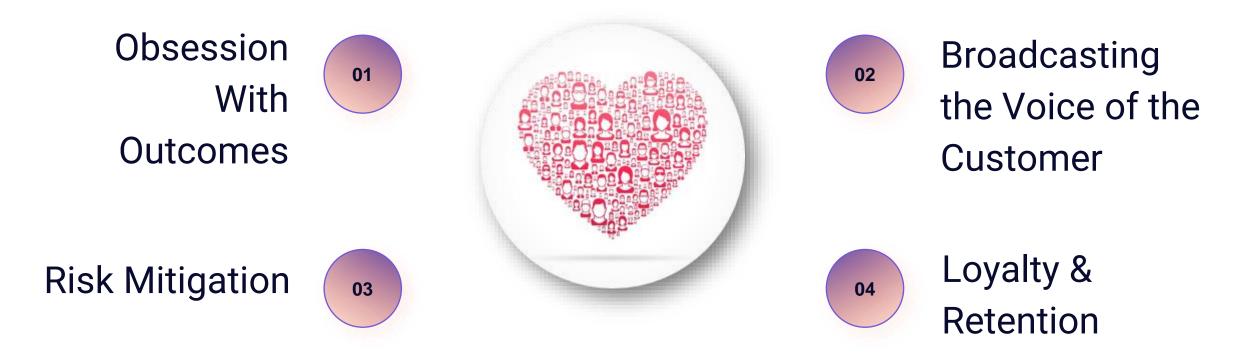


66 There are only two metrics that I want to be measured on as a Chief Customer Officer...

NRR & Advocacy

- Wayne McCollough Author, The Seven Pillars of Customer Success

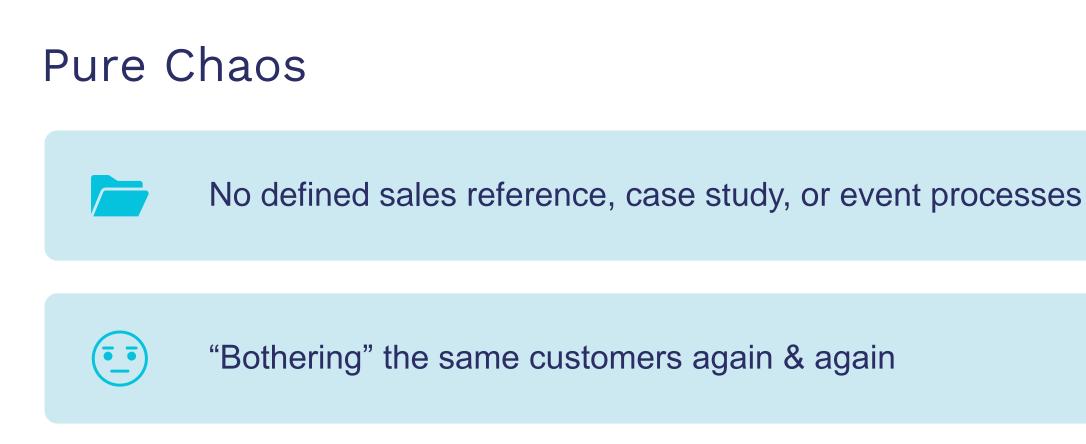
Why CX Should Own Advocacy





Where We Started...







No ability to track metrics or outcomes





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1. Admit You Have Problems

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

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3. Build Advocacy into Customer Milestones

Advocacy Prompts

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

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4. Partner with Marketing for Events & Content

- 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

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6. Maximize Every Tool In Your Stack

Slack

- #customer-stories ٠
- #cx-marketing-٠ mindmeld
- #cx-sales-mindmeld • for referral requests

Zoom

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

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

15Five

CSMs have individual advocacy goals each quarter







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

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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

(7)

Customer Opt-Outs

CSMs have jurisdiction over allowing customers to remain on the dashboard



Measure What Matters

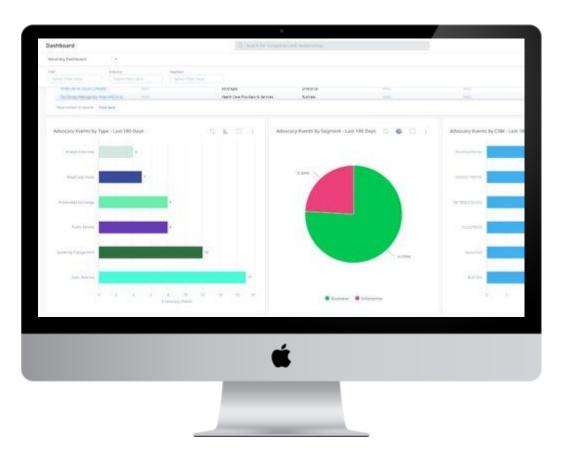
Advocacy progress is tracked and trends analyzed QoQ



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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?

