CUSTOMERXCON 2023

Building your Advocacy ecosystem:
People, Processes & Tools

Cache Walker
Sr. Customer Advocacy Manager
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ACCELERATE!

People, Processes & Tools

PEOPLE

- **Ecosystem of supporters** to a team of 1 (or anyone needing more hands):
  a. You and your advocacy team
  b. Other internal stakeholders (Sales, Account Managers, Marketers, etc)
  c. Leadership (executive buy-in)
  d. Community (CMA & Peers)
  e. Advisors

PROCESSES

- Documented processes don't exist until you **educate** participants on how to follow them.

- To improve your processes, you need a clear understanding of what you already have. **Your current state**.

- Since processes involve many participants, involve them in the improvement process as well.
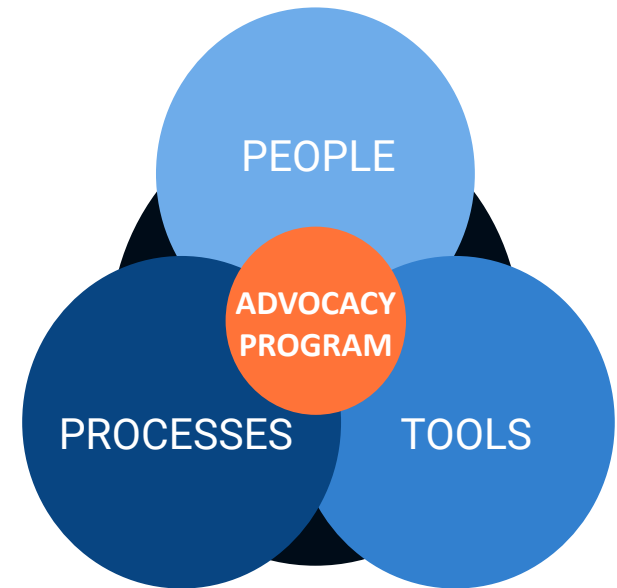
TOOLS

- Ensure **the tool works for you**, and you don't end up working for the tool.

- No single tool covers everything; **integrations** are essential.

- Avoid moving internal users **out of their familiar tools** (sellers won't easily transition out of their CRM).

- **Reporting** capabilities will enable you to make further progress and gain internal buy-in.

"A place where a culture of advocacy can thrive!"

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PEOPLE

ADVOCACY PROGRAM

PROCESSES   TOOLS

Now, take your handouts and a pen.

Let's write down the People, Processes, and Tools you currently have in your hands, and what you need to achieve your goals for each initiative.
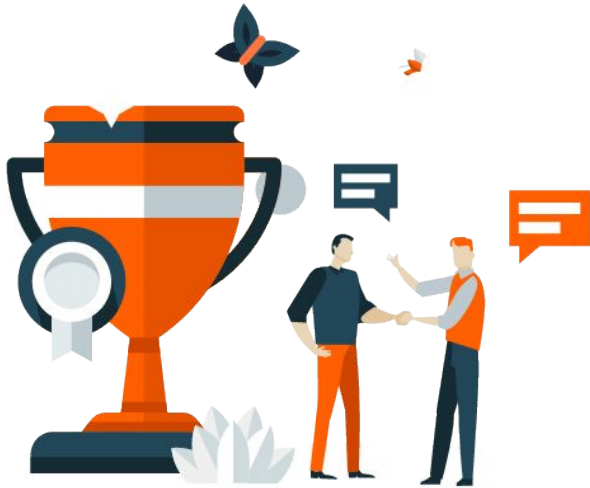
We have proposed some categories:
- CONTENT PRODUCTION AND DISTRIBUTION
- CUSTOMER REFERENCE MANAGEMENT
- PEER REVIEWS MANAGEMENT
- REWARDS PROGRAMS

Feel free to add your own categories in the last empty tables.

Group Conversations

Great, it's time to share!

Let's take 10 minutes to share your thoughts with your table mates.

Are you ready? Please choose a table leader who can summarize the key points of your discussion.

Main Takeaways

PEOPLE

- Think of Sales, Customer Success, and Marketing as an extension of your team.

- Seek executive buy-in and sponsorship.

- Consider implementing flexible part-time structures.

PROCESSES

- Documentation is your best friend.

- Documented processes don't exist until you educate participants on how to follow them.

- To improve your processes, you need a clear understanding of what you already have.

- Since processes involve many participants, involve them in the review and improvement process as well.

TOOLS

- Ensure the tool works for you, and you don't end up working for the tool.

- No single tool covers everything; integrations are essential.

- Avoid moving internal users out of their familiar tools (sellers won't easily transition out of their CRM).

- Reporting capabilities will enable you to make further progress and gain internal buy-in.

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THANK YOU!!

ACCELERATE!