How to Create Powerful Customer Advocates—All the Way to the C-Suite

EXECUTIVE SUMMARY

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Overview

Cultivating C-Level executives as customer advocates can make your firm. C-Level executives are often highly influential in their industries and have large rolodexes. They can provide you with the most powerful possible introductions to large numbers of other C-Level prospects. Yet in my experience, very few companies develop such relationships skillfully, or even think they can do so. This report will show you how.

What Can a Powerful C-Level Advocate Do for You?

- Open her Rolodex of other C-Level prospects for you.
- Build peer influence among her networks.
- Dramatically enhance your thought leadership efforts.
- Provide invaluable input into your strategy and product roadmaps.
- Attract other desirable C-Level executives into your network.

Key Steps

- Care. Don't just show up when you need a reference or referral.
- Remember: you have leverage. It's in her interest that you succeed as a business.
- Get delivery right (obvious, but often overlooked).
- Tout *her* successes, not just how wonderful your products and services are.
- To get her to open her Rolodex, help expand her network.
- Offer her a broad range of opportunities to engage with you.

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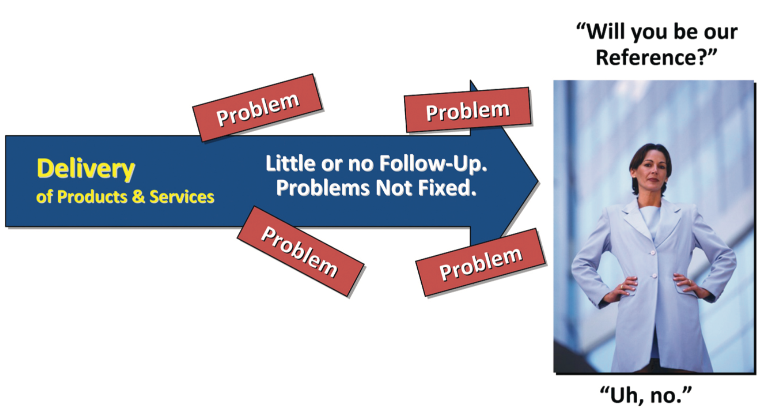
FULL REPORT

The question most firms seem to ask is, "How can we find more customer references and advocates?" A better question is, "How do you create customer advocates?" The answer: "Create a great value proposition"—and this approach will gain powerful advocates all the way to the C-Suite of your customers.

Here's how to do so.

- **The starting point (which everyone knows but many firms lose sight of over time): deliver what you promise and promptly fix what goes wrong.** These actions are what generate genuine enthusiasm from a customer, and without that, you don't have a real reference. You can't create or enlist a customer advocate or build a customer-based sales force without the solid foundation of an ongoing, responsive relationship.
- **Know your customers' problems.** "The most important thing you can bring to a dialogue with me is knowing my challenges," says Patty Morrison, CIO of Cardinal Health—a dynamic, highly respected, well-connected executive in her profession, and a dream customer reference for any technology business. "And it's really not that hard." She suggests that reference program managers invest in, or otherwise get access to their firm's market research about key-customer references. "If you want to develop a customer as a reference, know everything you can about them. And then know everything you can about your important prospects too."

Building an Advocacy Relationship
How NOT to do it.

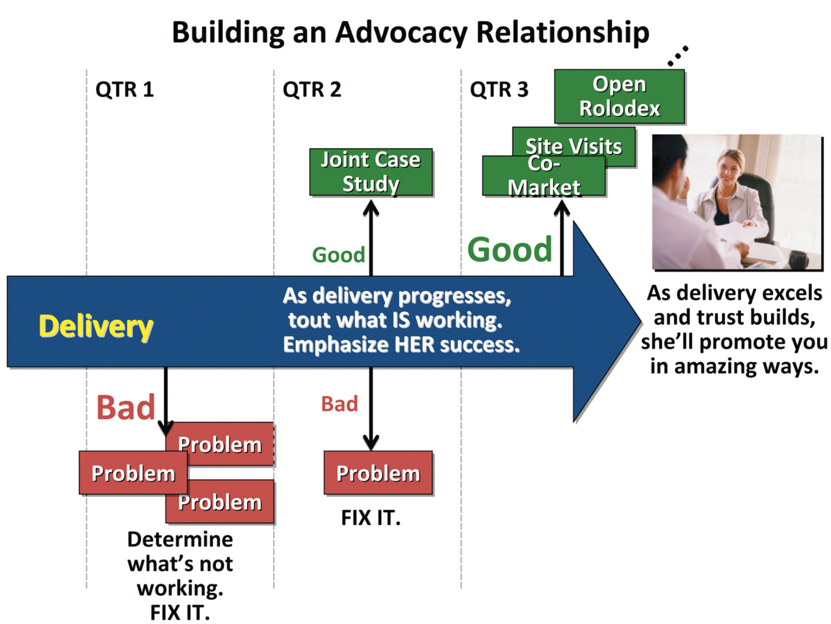


Remarkably, many firms ask customers to advocate *irrespective of performance.*

Remember, you have some leverage. If we're building our relationship, I'm willing to do what I can to help you grow your customer base.

Patty Morrison, CIO, Cardinal Health

- **Put your customer references together with their peers.** Your firm is in a great position to connect your customers to their peers—other executives and managers like themselves who deal with similar issues. And those connections are highly valued. But where do you find them? Among your other customers, of course. Find ways to bring them together—live, in teleconferences, on the Internet—so that they can exchange ideas and learn from each other. Often, that can be done in the context of events, such as industry conferences, at which they're providing references for you as well.
- **Market and sell your customers.** Tout your customers' achievements as much as—if not more than—your own in that white paper or case study. Work with your customer's PR firm to align your respective marketing messages.
- **Provide your customer references with opportunities for growth.** Often your most dynamic customer references are eager for personal and professional development. Provide these in the form of speaking opportunities, interviews with the media, and the like, where customers can demonstrate thought leadership.
- **Remember, you have leverage.** If your firm is a smaller supplier or brand new, your customers want to help you. "Helping my smaller vendors grow and get established is in my interest," notes Morrison. "So I'm willing to do what I can to help you grow your customer base. On the other hand, if you're larger and better established, you can help me reward my team by creating opportunities for them to showcase their work at conferences and present papers. It's great career development for them."
- **Tie referencing to performance.** For larger relationship accounts, some reference programs try putting an agreement to provide references up front in the customer's contract—a major and obvious turnoff. Yet many companies persist in doing, or trying to do, this. A better, value-based approach is to initiate a quarterly review process that looks more



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Patty Morrison, CIO, Cardinal Health

like the following (notice how providing references evolves naturally):

1. First, review all performance metrics with the customer every three months. Make sure they're being met. If any are not, address the problems swiftly.
2. Next, identify how your solutions are benefiting the customer and then document it. This is a superb win-win that provides customers with verification, a learning tool, and a basis for building best practices, while providing a case study or success story for you.
3. At this point (not before!), with everyone feeling good about the relationship, turn to a discussion of your prospects who are facing similar issues. By now your customer will be ready to open up her contact lists and talk to prospects on your behalf.

- **If possible—and it often is—align your PR messaging with your customer's.** "If you want a customer to speak as a public reference for you," notes Morrison, "you need to understand the message their own PR team is trying to get out to the world about their company. And then ask, how might your message tie into theirs?" When she was CIO at Motorola, for example, the company had public positions on things like mobility, devices, and public safety. So, if you're doing business with Motorola, how can you tie your messaging to theirs? "If my PR person comes into my office with you and you both say, 'Here's the messaging we think benefits both our companies,' then I see a win-win. I'm there."
- **Offer other customer-engagement possibilities**. This is particularly important for your higher-level key customers, who may very well want to provide input into product or solutions development, or even your strategic direction. Offer such customers positions on your advisory boards or executive forums. (We will explore this aspect of ROR in depth in later chapters.) Or they may want to engage with your other customers or other peers in community efforts.
- **Succeed!** A customer who's taken the risk of putting her eggs in your basket wants you to succeed for obvious reasons—if yours is a small company, you're more likely to survive. If you're a large firm, you're more likely to invest research and product development dollars improving the solutions you're providing. And that's true even if your customer is a large or even marquee customer. Don't be intimidated about asking for appropriate reference support.

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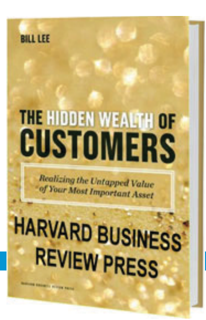

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