Customer advocacy template

Customer advocates can facilitate success when working alongside sales and support teams. They play a key role in:

1. Maintaining customer relationships
2. Enhancing brand awareness
3. Providing insights and assistance to other customers
4. Improving product launches

This five-step process outlines how product marketers can build and optimize their advocacy programs.

| **Steps** | **Goals** |
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| 1. Engage with your customers | To understand the customer on a deeper level |
| 2. Identify customers | Potential brand advocates |
| 3. Reach out | Asking for feedback |
| 4. Automate tasks for teams | Collaborate with teams |
| 5. Share social proof | Prove brand value through social proof |

| **1. Engage with customers** | | |
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| **Customer touchpoint** | **Timeframe** | **Tasks** |
| Onboarding | 90 days | Send welcome messages |
| Talk to your customers |
| Conduct virtual events |
| Ask them to participate in webinars |

| **2. Identify customers willing to give reviews** | | |
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| **Customer touchpoint** | **Time frame** | **Tasks** |
| Adoption | 6 months | Product tutorials |
| Create and curate content to help them achieve more |
| Conduct business reviews to showcase the value and future goals |
| Conduct joint webinars |
| **Identify** |
| Which customers do you share the best relationships? |
| Which customer can give case studies? |
| Who can provide testimonials? |
| Which customer is willing to part with reviews? |

| **3. Reach out to the decision maker** | |
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| **Timeframe** | **Tasks** |
| 3 months | Reach out to the decision maker (in your customer's org) |
| Ask for specific feedback |

| **4. Automate tasks for sales and marketing teams** | |
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| **Timeframe** | **Tasks** |
| 2 weeks | Once feedback is received, set up tasks for marketing and sales team to:  1. Send out "thank you" emails 2. Convert it into a case study and/or video testimonial 3. Share it with your customer to get his consent before publishing |
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| **5. Share social proof** | |
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| **Timeframe** | **Tasks** |
| 2 weeks | Publish it on your website and share it on your social media handles |
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