



Advocacy Training
September 8, 2022

Your Hosts



Guy Hanson

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Jason Crichton

Director, Customer Success



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Agenda

- Advocacy Program & Purpose
- Common Obstacles
- Advocacy Guests
 - Tonya Mitchell, Sr. CSM – Email
 - Aja Sanders, Manager of Data Services –Data
 - Coralie Levi, Sr. CSM - Email
- Working Examples & Best Practices
 - Kennedy Garland , Sr. CSM - Email
- We're Here to Help - Resources
- Questions?



Advocacy Program & Purpose

Guy Hanson

Voice of the Customer



Advocacy An Illustration!



Jeff Foley  21:07

The scene, here at HubSpot Invound event in Boston:

- customer from university of Brazil shows up
- We tell him we have an office there and lots of customers
- Asks if we have examples. Blank stares because we did not bone up on LATAM customers before coming
- Go to website, switch to Portuguese, go to customer list...
- “You heard of acordocerto?” “Oh yeah, yeah!”
- We scroll through case study. “Wow this is amazing, thank you!”

Fin.



Advocacy Purpose

- **Marketing:** Assets like testimonials, case studies, event speakers, and PR activity are the life blood of our marketing activity
- **Sales:** All the above are vital in helping our sales team tell their story. Customers who do referral calls are possibly our *most* valuable form of advocacy.
- **Customers:** Advocacy provides a great opportunity to build even stronger and more durable relationships with your most important customers.
- **Yourselves:** Our customers regularly sing the praises of the CS team members who service their accounts, so they make you look great!

79% of marketers who have turned their customers into advocates see increases in upsell, cross-sell, and enrichment.

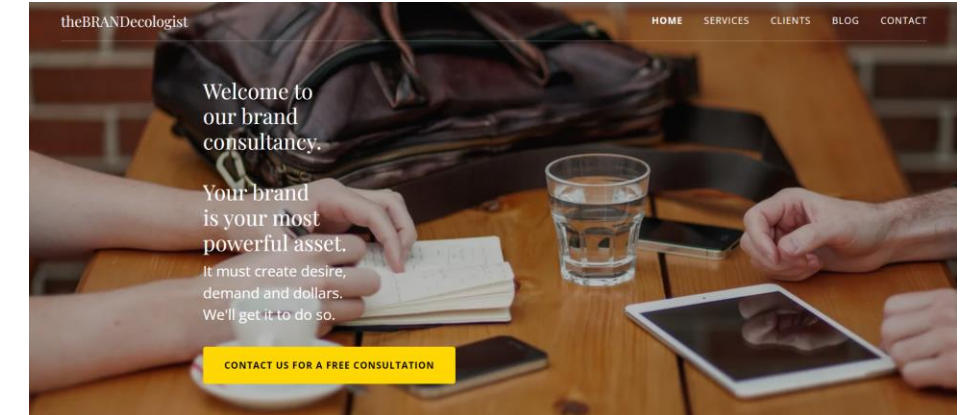
92% of these marketers say that engaging post-sale increases marketing's credibility with customers.

www.forrester.com/blogs/build-an-effective-customer-advocacy-program-by-knowing-the-four-advocate-types

Advocacy External Insight

"The three key anecdotal effects on customer advocates in my view are as follows: "

- "It gives them a sense of inclusion, belonging, and (frankly) ego by being part of an expert group that is "in the know". They are called on as valued experts in their field to come and speak to why this approach is smart business. It's flattering to them and honors them as professionals."
- "It also forces them to think through, articulate, and publicly own the value Validity brings to them and their business needs. This deepens their buy-in, commitment, and loyalty to you by publicly towing the line. They rationalize and think about their role differently as a result."
- "And finally, it deepens and elevates their sense of partnership with Validity from the transactional to the collegial. You strengthen and nurture an existing relationship by presenting and being in the trenches together. It builds friendships, transparency, and shared thinking and problem-solving."



**Henk Groenewald,
The Brand Ecologist**



Advocacy The Four Types

- **Educators:** love to share their experiences and swap best practices
- **Validators:** like giving feedback and offering suggestions about new features or capabilities.
- **Status Seekers:** ambitious and influential — they want to grow their personal as well as their company's brand.
- **Collaborators:** appreciate opportunities to test strategies and explore new ideas. They will also invest in your success using their clout and resources. (Executives tend to over-index on this personality).

Build An Effective Customer Advocacy Program By Knowing The Four Advocate Types

www.forrester.com/blogs/build-an-effective-customer-advocacy-program-by-knowing-the-four-advocate-types

Advocacy Signals

- **Success Story:** customer has seen a significant uplift in program performance, validating working with us.
- **Direct Feedback:** positive words or phrases like: "Extremely happy with service"; or "Great business/KPI results"
- **NPS Surveys:** positive scores or feedback in their NPS surveys (>9 North America, >8 International);
- **Events:** customer has attended a Validity event, webinar, expert office hours, or customer advisory board session
- **Ad-Hoc:** feedback from our Elite ("Whale") program; closed support tickets; positive feedback from social media (LinkedIn) or industry channels (Emailgeeks)



Advocacy Different Forms

- **Use of Name/Logo:** We have permission to use the brand on our website
- **Testimonial (Quote):** Written quote with approval to use
- **External Asset:** Link to a G2, TrustRadius or AppExchange review
- **Product Feedback:** Feedback on solutions, beta programs, new product discovery
- **Reference:** Customer can be contacted for a reference call
- **Case Study:** A published case study on the Validity website
- **Event Speaker:** Contact is willing to speak at Validity events
- **PR Contact:** Can be contacted by our PR agencies for press/media opportunities



Common Obstacles

Jason Crichton

Common Obstacles

- **Newer Relationships**
 - "I haven't spoken to this client much and I am not very comfortable asking about an advocacy"
- **(Legally) Customers Can't Participate**
 - "My contact would love to be an advocate, but their legal department will not allow them to participate" (*use of logo, company name, speaking engagement, etc.*)
- **Asking "Too Much" of our Customers**
 - "I have asked my client to help with X, Y, Z, etc., however I feel like they are burnt out on asks from myself/Validity".
- **Getting to the "Ask" Can Be Difficult**
 - "My client makes it difficult to bring up the topic of advocacy"
 - (I.e. - client is disconnected, has low follow through on asks, etc.)





Advocacy Guests

Tonya Mitchell, Aja Sanders, Coralie Levi

Advocacy with Tonya Mitchell

Management/Corporate Approval Required



Trigger for Advocacy: Client commented about manager being impressed with Everest

- Asked if would provide testimonial – initially stalled because needed approvals
- Personable contact that "gets it" – floated idea of being part of webinars as well
- Ensured followed-up

Advocacy Outcome:

- Testimonial and use of logo
- Guest speaker at Etail conference
- SoE speaker - MPP
- Client open to additional events

Interest For Right Topic



Trigger for Advocacy: Client noted that he likes to "build his personal brand"

- Personable/knowledgeable contact so asked if interest in being a guest speaker in webinars
- Alerted Guy and made introduction
- Note that did say "No" to an SoE option that wasn't a good fit – but we pursued other options

Advocacy Outcome:

- Guest speaker - Adobe Summit webinar
- Adobe/Validity combo webinar speaker
- Client open to additional events

Platform/Product Frustration - But Always Gives Great Feedback



Trigger for Advocacy: Client knowledgeable and would often give input/requests for product features

- Feedback often due to frustration with product, so not ready to approach for testimonial!
- Asked if would be open to speaking directly with our Product Manager to provide feedback

Advocacy Outcome:

- Pfizer – Mandated Mail Feedback
- Omaha Steaks – Certification Dashboard Feedback



Advocacy with Aja Sanders

Take Advantage of Every Opportunity



Customer: GOJO Industries

Opportunity: Positive comment on an NPS Survey

Action Taken:

- Sent an email thanking the customer for his great feedback
- Asked if we could use his quote in our marketing materials.

Outcome:

- Customer Response: *Please feel free to use any of the content I share with you. I have no doubt DemandTools is an awesome tool and will continue to lead for any org to effectively manage their data in SFDC.*

Customer: RideCell

Opportunity: During an Office Hours session, customer mentioned that she referred Validity her to new employer

Action Taken:

- Sent an email to Angie to personally thank her for referring us to her new employer.
- Asked her if we could use her great feedback as quotes in future marketing materials
- Asked her if she would additionally be willing to submit a review of DemandTools, and/or participate in any case studies/event speaking.

Outcome:

- We have received a testimonial from her, a positive review of DemandTools on G2, a completed case study AND...the customer is participating in a Validity speaking event at DREAMFORCE 2022.

Customer: Touch Bistro

Opportunity: Positive comment following a product overview meeting

Action Taken:

- Responded to the customer thanking her for the great feedback
- Asked if we could quote her in our future marketing materials

Outcome:

- The customer gave her permission to use her quote in any of our marketing materials and even provided an extra quote for us to use.



Advocacy with Coralie Levi

“I have never done anything like this before and I am not that comfortable with public speaking.”

- Explained my experienced.
- Explained the preparation done in advance.

What happened:

- 3 webinars (with different 2 contacts)
- 1 case study

How to ask your client for an advocacy?

- Present the advantages for the brand (works best for smaller brands) and the individual contributor.
- Ask for help from the rest of the account team.



What happened:

- 1 Webinar
- 1 Case Study
- Product feedback
- Beta testing (BIMI)



THE BODY SHOP

“The company policy is against logo usage with third party partners” and “I need approval from Senior Management, and I can’t really do that right now”

- Product feedback
- Individual contributor panel discussion
- Other projects

What happened:

- DMA entry submission with the Body Shop
- Panel Discussion with Samsung
- Product feedback with Samsung

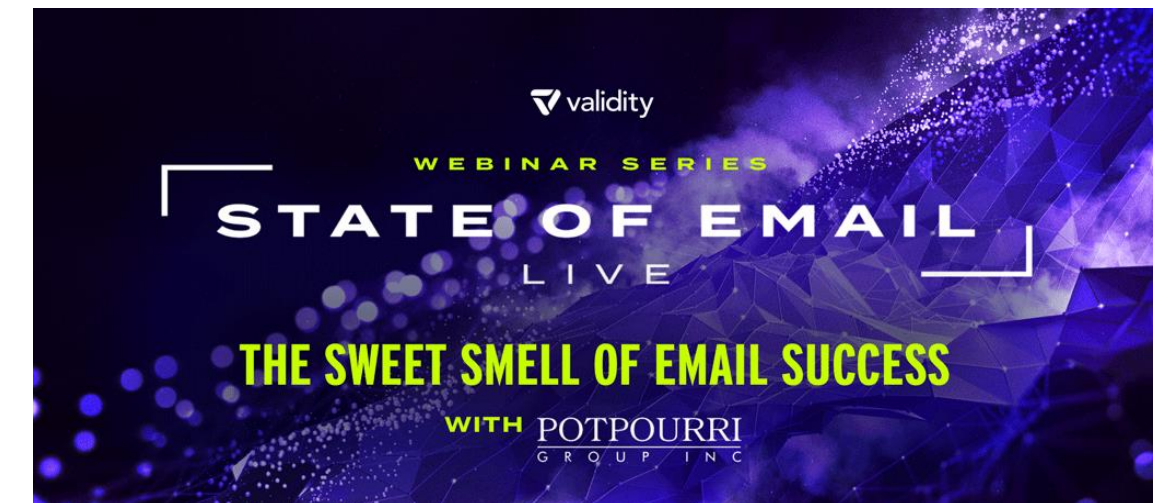


Working Examples & Best Practices

Guy Hanson

Working Example: Kennedy

- Approached Guy to discuss a list of her clients where she thought there might be an advocacy opportunity.
- Set up a call and carried out a mini-review for each account: How are they using Validity?; What success have they had? Would the personality of each contact be a good fit?
- Defined a short list of the clients we felt would be good fits for advocacy, which advocacy type would be most appropriate, and how to open the conversation.
- **14** new advocacy records this year for a total of **25** points!




Working Example: Ignacio

Virgin Atlantic Advocacy - Message (HTML) Search

File Message Help

Virgin Atlantic Advocacy

 **Guy Hanson**
To: Ignacio Lecuona
Cc: Helen Parslow; Priyanka Roy; Elliot Rhoden
29/07/2022

Retention Policy Validity 6 Month Deletion Policy (6 month) Expires 25/01/2023


As you may have heard, the State of Email webinar Virgin Atlantic did with us smashed all records, and generated a load of amazing feedback. Most importantly, it was a highly positive experience for Tom and Jon, and has opened the door to a number of new opportunities with us, including a case study, awards submissions, and their use of MailCharts (possibly VTO as well).

This means you have a few advocacy credits to claim, as follows:

- Case study
- Press & PR (for the awards submissions x 2 – Tom and Jon)
- Referral clients (x 2 – Tom and John)
- Product feedback (x 1 for Jon, you already have Tom)
- Event speaker (x 1 for Jon, you already have Tom)

So I think it's fair to say the great relationship you've built with this account means you've single-handedly smashed your advocacy target for this year! We're delighted – all advocates are important, but occasionally we develop a "super-advocate" like this, and they are genuine gold dust for us! Please make sure you record all of these once you are back.

All the best

 **Guy Hanson**
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Best Practices: Personal Capacity

Not *all* advocacy types need official approval. Try aiming for the ones where your contacts can assist "off the record" in their personal capacities:

- Referral calls
- Product feedback
- Reviews (can be anonymous)



Best Practices: Multiple Touchpoints

Some advocacy types can be claimed for *more* than one contact in the *same* business, so don't stop when you get the first one:

- Testimonials
- Reviews
- Product feedback
- Referral calls
- Event speaking



Best Practices: Don't be Shy!

It can sometimes feel awkward asking for a favor, but remember customers *love* celebrating their success stories, and looking great in public (or in front of their managers!)

- AstraZeneca
- Virgin Atlantic
- J.Jill





We're Here to Help (Resources)

Karen Rogers-Coyne

Resources SharePoint

The screenshot shows a SharePoint site for a group named 'Advocacy'. The top navigation bar includes the 'validity' logo, the text 'SharePoint', a search bar with the placeholder 'Search this site', and utility icons for notifications, settings, help, and a user profile icon labeled 'GH'. Below the navigation bar, the site title 'Advocacy' is displayed with a 'GA' icon. To the right of the title, it indicates 'Public group', 'Not following', and '16 members'. A left-hand navigation pane lists various site pages: Home, Advocacy Type, Securing an Advocacy..., FAQ, Documents, Full Benefits of Advoca..., Latest updates, Customer Quote Repo..., Recycle bin, and Edit. The main content area features a '+ New' dropdown, 'Page details', and 'Analytics' options. It contains four tiles: 'Advocacy Types', 'Securing an Advocacy Prospect', 'Full Benefits of Advocacy for Clients', and 'FAQ'. Below these tiles, a paragraph states: 'State of Email Live is always on the lookout for guests that are doing great things in email and would be willing to share with the world. If you know of someone that is a good fit, follow the instructions from the [Event Speaker page](#) to make the ask. Below is a list of the upcoming SoE topics:'. A bulleted list follows: '• ESP all hands', '• Anti-spam all hands', and '• MPP 1 year-on'. To the right of the main text is a 'News' section with an '+ Add' dropdown and a featured image for 'Adobe Summit' with the headline 'We're reimagining experiences at Adobe Summit.' and a call to action to register for free.

<https://crmfusion.sharepoint.com/sites/Advocacy>

Resources How To Guide



Capturing Advocacy

Advocacy in Salesforce

Overview

The purpose of this guide is twofold:

- To help you understand how to capture customer advocacy in Salesforce in order for us to build a referenceable library of 'assets' that can be used across the company.
- To explain how to use SFDC to find advocates and then track that activity so we are able to report on advocacy asks across our customer base.

Advocacy and the Advocacy Object

There are 8 types of advocacy:

- Prospect - Someone who has shown an interest in becoming an advocate
- Use of Name / Logo - We have permission to use the brand on our website etc.
- Case Study - A published case study on the Validity Website.
- External Asset - Link to a G2 Crowd or AppExchange review etc.
- Customer Testimonial - Written quote with approval to use.
- Reference - Customer can be contacted for a reference call.
- Event Speaker - Contact can speak at Validity events.
- PR Contact - Contact for our PR agencies.

All of these are captured in the new 'Advocacy' object in Salesforce which is visible under the 'Related' tab at both the Account and Contact level.

Each Account can have multiple Advocacy records - Examples would be a Case Study, use of Logo on our Website, a person who will speak at an event etc.

3

Adding a new Advocacy record

Account Related List

From any account, switch to the 'Related' tab to find the Advocacy object. From here you can see existing assets and select 'New' to create a new record.

Advocacy Number	Contact Name	Type	Primary Product
001000001	John Chen	Customer Quote	DemandTools
001000002	John Chen	Event Speaker	DemandTools
001000003	John Chen	Customer Quote	DemandTools
001000004	John Chen	Event Speaker	DemandTools

Contact Related List

From any contact, switch to the 'Related' tab to find the Advocacy object. From here you can see existing assets and select 'New' to create a new record.

Advocacy (Contact Name)(2)	Type	Primary Product	Created Date
001000001	Customer Quote	DemandTools	03/02/2021
001000002	Event Speaker	DemandTools	03/02/2021

After selecting 'New' you will be presented with the below popup - Full details of each field are on the next page.

3 of 7

4

New Advocacy

Details of the account / contact and Validity employee entering the information. Created date and Expiration date (+365 days) are added automatically.

Details of any approvals that may be needed to use logos/quotes etc. Notes capture any relevant information. Please ensure that the 'Approver' is captured even if different from the main contact.

Asset Link is to capture the URL of any web asset (case study, paper, external review etc.) Notes to capture any notes or comments against the asset. The details section is a rich text field where you can capture text, graphics etc.

Once you have filled in all the details, click 'Save' and the record will be assigned an ID and saved against the contact or account.

<https://crmfusion.sharepoint.com/sites/Advocacy>

Resources Use Us !!!

- **Guy**

- Brainstorming
- Calls with clients
- Wordsmithing

- **Your Colleagues**

- Aja
- Coralie
- Julie
- Thiago
- Tonya
- Your managers, etc.

- **The Advocacy Team**

[Advocacy@
validity.com](mailto:Advocacy@validity.com)



Questions



Thank you!
