

**THE**

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# Advocate Marketing *Playbook*

CREATED BY TOPO

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**TOPO**

Detailed playbooks for all  
things sales and marketing

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 **influitive**  
advocate marketing experts

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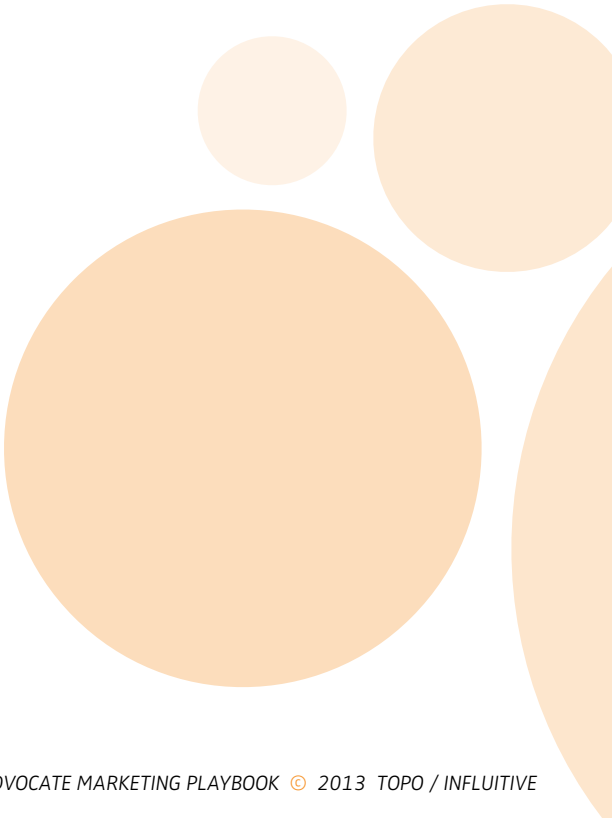
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**01**

***Introduction***

# Why Advocate Marketing?

The way buyers purchase products and services has fundamentally and rapidly changed over the last five years. The most important shift is that they now want to learn about products and services from authentic, trusted sources – such as a company’s customers – before they buy. They aggressively seek these sources well before engaging with salespeople:

- Word of mouth is the primary factor behind 20% to 50% of all purchasing decisions. (McKinsey)
- 63% of consumers search for help from other customers online. (Lithium)
- Brand advocates are 70% more likely to be seen as a good source of information by people around them. (BzzAgent)

The rise of social media and online communities has accelerated this change. Just as they visit Yelp before dining out, your prospects will find a current customer and learn about their experiences with your products in just a few clicks on LinkedIn, Quora or any of the hundreds of product review sites.

Who are they going to connect with and what experiences are they going to hear first? As a B2B marketer, you may be wrestling with how to best influence these prospects through positive word of mouth marketing.

## **What you need is an army of advocates.**

Advocates are not just satisfied customers. They are enthusiasts who embrace your company’s vision and willingly advance your interests through their interactions with others. Whether by sharing experiences online, referring new business or recommending your products, these supporters have an enormous – but sometimes unseen – influence on your brand, demand generation and pipeline efforts.

In a world like this, one of the most powerful things you can do as a marketer is to find, organize and mobilize these advocates.

With a marketing asset this valuable, you can’t just cross your fingers and hope it happens organically. As the importance of peer-to-peer recommendation grows, marketers will need to actively convert customers into advocates and build advocate marketing programs that mobilize their advocates to support sales and marketing initiatives.

## **Advocate marketing delivers impressive results**

Your advocate marketing program can support a number of key business objectives. Referral leads are typically the highest converting lead source and, on average, leads generated by B2B advocates are four to 10 times more valuable than regular leads, resulting in shorter sales cycles, increased win rates and larger order sizes.

Leads generated by B2B advocates are **four to 10 times** more valuable than regular leads

But advocates do more than just contribute to revenue. Advocates can help in a number of different areas, including product design, positioning, social media and content marketing.

Advocate marketing won't break the bank, either: according to eMarketer, a company could fund an ongoing advocate marketing program for an entire year for about the cost of two full-page ads in the Wall Street Journal.

### **Getting started**

Unlike other strategic marketing initiatives, advocate marketing programs are relatively easy to deploy as all of the elements necessary for a successful program already exist at most organizations.

First of all, whether you realize it or not, you likely have many advocates who are already recommending you to their peers or taking reference calls. An advocate marketing program simply allows you to organize this process, mobilize your advocates to support your existing sales and marketing initiatives, and recognize them for participating.

In other words, the question for advocate marketing isn't why, but when and how? We answer the "how" in this Advocate Marketing Playbook. And once you complete the Playbook, you will realize the "when" can be sooner than you might have expected.

# The Advocate Marketing Playbook

This Playbook provides marketers with a blueprint from which to build and manage a successful advocate marketing program; it's a detailed "how-to" guide based on proven best practices.

### **What's inside the Playbook**

This Playbook is divided into four sections, each of which contains useful best practices, case studies and tools to help you create your own advocate marketing program:

1. Advocate marketing fundamentals
2. Organization, technology and metrics
3. The advocate marketing process
4. How to get started

### **Who should use the Playbook**

Marketers who believe that their customers are their best assets and wish to leverage, scale and normalize the advocacy of their customers in current and future marketing programs will find it particularly useful.

### **How to use the Playbook**

The Advocate Marketing Playbook focuses on how to create and manage an advocate marketing program. It doesn't spend a lot of time on what advocate marketing is or why it's important.

Think of the Playbook as a roadmap to guide you through the process of planning and launching your own advocate marketing program. Don't forget to set aside time to answer and discuss the worksheet questions with your colleagues as you go.

# The Essentials Of Advocate Marketing

Advocate marketing involves managing a company's advocates to achieve business objectives, such as revenue growth or increased demand generation. It's a simple but powerful concept: as the power and influence of word of mouth grows in buying processes, B2B companies of all sizes, industries and niches need to proactively develop and manage their most important marketing asset – their happy customers and fans.

As you plan, build and execute on your own advocate marketing program, these five elements will be critical to its success:

## 1. Tying advocate marketing to your business objectives

Advocate marketing can serve a variety of business objectives, so it's important to tie your program to revenue achievement and specific sales and marketing tactics, such as lead generation, pipeline development and sales cycle acceleration.

You may also want to consider how your advocate marketing program can support other objectives, such as customer satisfaction, product marketing and product development.

## 2. Understanding who your advocates are and what motivates them

Customers are often a company's most important and influential type of advocate. They come in different shapes and sizes, and are seeking different experiences as advocates. It's essential to segment your advocates to align their interests with the right types of advocate activities.

You also need to understand other types of advocates, such as employees, partners, investors and influencers. These groups can contribute to your marketing and sales efforts by promoting your brand and content, referring new business and sharing their positive experiences with your business.

## 3. Designing an advocate marketing program that scales

Once it's up and running, a successful advocate marketing program will include hundreds - possibly thousands - of advocates. As you build your own program, you should carefully consider how yours will be managed, and how you can make the process more scalable, predictable and efficient. These are just some of the reasons marketers have started moving away from managing their advocate programs through email, spreadsheets or CRM applications in favor of all-in-one platforms built specifically to manage B2B advocate marketing programs.

Campaigns consist of an **"ask"** where you ask your advocates to do something

#### 4. Building engaging advocacy campaigns

Advocate marketing campaigns are how you engage with advocates. Campaigns consist of an “ask” where you ask your advocates to do something, such as writing a review of your product, and the “response” where the advocate responds by writing the review. Like any marketing campaign, the style, tone and creativity of these campaigns will greatly determine engagement and results.

The success of your advocate marketing program may also depend on your ability to “nurture” your advocates. In other words, it’s probably not the best idea to jump right in with large asks that may turn off your advocates - start smaller, easier to complete asks and then build up to those larger campaigns.

#### 5. Measuring and optimizing your advocate marketing program

Like most marketing programs, advocate marketing should be measured. Focus on strategic metrics that relate to core business objectives, like customer referrals, references and reviews. Just as important are operational metrics, like advocate and campaign engagement rate, and advocate growth and churn. Finally, use this data to optimize your advocate recruiting and engagement efforts.



# Advocate Marketing Worksheet

## #1: Getting Started

- ✓ Which business objectives will your advocate marketing program be tied to? e.g., lead generation, sales cycle acceleration, product development, etc.
- ✓ Who is already advocating for your company? List 10 people who have actively advocated for your company in the last month.

1.	6.
2.	7.
3.	8.
4.	9.
5.	10.

- ✓ What motivates them to advocate for you now?
- ✓ Who in your company owns the relationship(s) with these advocates?
- ✓ What types of “asks” or campaigns will you ask your advocates to do?
- ✓ What results would you like to come out of the program?

# Use Case: A Marketing Automation Software Company's Referral Drive



Act-On Software is a cloud-based marketing automation software company that, like many others, relies heavily on sales leads referred by existing customers. To continue their rapid growth, they needed to develop a way to generate many more of those leads on an ongoing basis without coming back to the same customers too often.

Act-On launched an advocate marketing program, called ALUV, and worked toward establishing a successful referral program by:

- ▶ **Finding their advocates** – Act-On rewarded their sales and customer success team members for inviting customers to join ALUV.
- ▶ **Starting with small “asks”** before jumping into the referral campaign – For example, they promoted a survey campaign in the program and received more than 100 responses in just 48 hours.
- ▶ **Making it easy** – The advocate marketing platform that ALUV is hosted on integrates with LinkedIn, allowing advocates to find referrals in their network, and has built-in referral technology.

**500%**  
higher than  
the industry  
standard

After warming up their advocates with those smaller “asks”, Act-On launched a referral campaign, asking advocates for a warm email or phone introduction to someone they thought could use the software.

In just a few months, Act-On’s referral campaign resulted in:

- 209 high-quality referral leads, which close at a rate 500% higher than the industry standard
- \$180,000 in pipeline
- \$80,000 in closed business
- A better relationship between sales and marketing

# The 5 Pillars Of A Successful Advocate Marketing Program

A well-designed advocate marketing program is built around the needs of the advocate. Remember, you are developing a program that continually asks your customers and other constituents to take time out of their day to help you market and sell. That's a big ask.

Start by carefully considering what the program provides the advocate. Do they want recognition? Access? Social capital? These are common motivators for fans and the entire program should be oriented towards delivering on these needs.

When designing your advocate marketing program, think about breaking it down into its fundamental pieces. First, you'll need to identify likely advocates and invite them into your program. Second, you'll need to engage advocates in a variety of different campaigns that match their interests. Third, you'll want to make sure that you can measure the impact of the program.

A well-designed advocate marketing program has five core components:

## 1. The advocate marketing plan

This is a strategic plan that specifies the program's objectives, process, organization, technology and metrics. It's a living document that can be updated as you learn more about who your advocates are and what they want.

## 2. The advocate marketing process

The advocate marketing process defines how you recruit, engage and recognize your advocates. It also includes recommendations on how to plan and analyze advocacy efforts. The steps can vary – what's important is that there is a standard process so that the program can scale.

### 3. The advocate marketing organization

Advocate marketing is not a people-intensive effort. In fact, the advocate marketing organization really only needs two people: an executive sponsor (typically the CMO) and a functional owner of advocate marketing (the Advocate Marketing Manager).

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There's a good chance that your Advocate Marketing Manager **already** exists somewhere within your company

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There's a good chance that your Advocate Marketing Manager already exists somewhere within your company, either in a community management or customer marketing capacity. They should be creative communicators who can also plan strategically with the help of their executive sponsor and analyze the results of their work.

### 4. Supporting technology

Technology can act as a "force multiplier" for the program. Some companies may use email, spreadsheets or a CRM application (or a combination of all three), but others will want a dedicated application or platform that allows a single marketer to organize, communicate with and mobilize advocates at scale.

### 5. Advocate marketing metrics

You should measure your program to determine its business impact. Use a combination of tactical metrics, like the number of advocates currently engaged in the program, as well as strategic metrics that show how the program impacts your company, like revenue sourced and influenced by advocacy.

# 6 Common Advocate Marketing Applications/ Use Cases

There are dozens of objectives that an advocate marketing program can support. But generally they fall into six categories:

## 1. Revenue growth

The most powerful use case for advocate marketing is to generate more high-quality referral leads. It makes sense – the driving force behind the advocate movement is that buyers are heavily influenced by their peers when making purchasing decisions. Every B2B company wants more referrals.

But while every great advocate marketing program has referrals as its foundation, asking for referrals isn't how to engage new advocates. In fact, if you jump straight into asking for referrals too early, it could alienate your advocates. A successful referral program instead 'warms up' advocates through a progression of advocate marketing campaigns to build trust, confidence and engagement.

Just like baseball teams are built on a foundation of cultivating their most promising new players in a "farm team" system first before eventually calling them into the major leagues, the most effective B2B referrals emerge from carefully organized advocate programs.

## 2. Demand generation

Your advocates can support your demand generation efforts in two ways. First, advocates are very effective at promoting lead generation offers. Second, offers such as white papers and webinars that include contributions from advocates tend to convert leads at a higher rate than those that don't.

## 3. Inbound and content marketing

You may have great content – but is it getting to your target audience? Up to 70% of content produced by B2B marketers goes unused. Advocate marketing programs can act as an effective content distribution network by getting advocates to share your content to their networks. They can also help you crowd source content through surveys and interviews, and produce the kind of blog comments and activity that boost SEO efforts and inbound lead capture.

## 4. Sales enablement

Your sales team probably already has a short list of customers who they can call on when they need references, testimonials or case studies, but before long those customers are burnt out and tired of hearing from you, leaving your salespeople desperate. An advocate

The driving  
**force**  
**behind**  
the advocate  
movement is  
that buyers  
are heavily  
influenced  
by their  
**peers**

marketing program provides an easy and effective way to identify, organize and mobilize the customers best-suited to each of these requests from a larger pool of advocates. Then your sales team can even pick and choose the advocates who are most relevant to their prospects' industry, seniority and use cases.

## 5. Customer engagement

Despite conventional wisdom about “bugging” your customers to complete tasks for you, they actually become more loyal to your company the more they advocate for you - especially when it's an easy, fun experience.

As individuals, they become an essential part of your team – expert product users who are much more likely to renew existing contracts, buy additional products and champion your product at their new company when they move jobs.

## 6. Product development

A company is only as good as the product or service it delivers to its customers. The best way to ensure your product meets expectations is through constant market feedback. But getting authentic product feedback from your customers can be like pulling teeth. Why rely on surveys, focus groups and beta programs when a powerful advocate program can give you real-time feedback in a fraction of the time – from your ideal customers.

# Use Case: A SaaS Vendor's Word Of Mouth Campaign



Xactly is a provider of on-demand sales compensation and sales performance management. They are a prime example of advocacy marketing effectiveness. Their advocate marketing program is called FOX - Friends of Xactly. The strategic goals of the program were to drive viral word of mouth via advocate product reviews in communities and third party websites, and ultimately drive new product sales via advocate referrals.

In order to achieve these strategic objectives, they set four operational goals:

1. **Generate reviews for award nominations**
2. **Drive LinkedIn engagement**
3. **Gather employee referrals**
4. **Increase social conversations**

The FOX program onboarded hundreds of advocates and then sent a series of "asks" to them. They chose recognition programs that resonated with their advocates including:

- ▷ **Guest blogging opportunities**
- ▷ **Media interviews**
- ▷ **Invitations to industry events**
- ▷ **Gift cards and baskets**
- ▷ **Social media recognition**

In just one year, the FOX advocate marketing program delivered incredible results:

**2012**  
Customer  
Choice  
Award

- 80% of customer activity on Salesforce AppExchange was driven by the advocate marketing program, which resulted in Xactly receiving the 2012 Customer Choice Award.
- 262 recommendations, follows and shares on Xactly's LinkedIn page resulted in Xactly winning one of LinkedIn's 12 best company sites of 2012.
- 89 Twitter followers and 96 Facebook likes from their advocate social interaction program.
- 500th customer signed via the referral program.



02

***Organization,  
Technology  
And Metrics***



# The Advocate Marketing Organization

Building an organization to support advocate marketing is critical to the program's success. The program does not need a large number of people. As a matter of fact, the advocate marketing organization often needs only two people: an executive sponsor (typically the CMO) and a functional owner of advocate marketing (Advocate Marketing Manager).

However, it is extremely important that the advocate marketing owners have support from other members of the organization in order to:

- Understand the company's advocate personas
- Identify, onboard and nurture new advocates
- Develop communication around key events, product launches and campaigns where advocate marketing can boost results
- Position "asks" so they are compelling and engaging to advocates
- Co-ordinate early or exclusive advocate access to content or events
- Source rewards and recognize advocates in a personalized manner

Company leaders from all functions should encourage their teams to collaborate with the program owner to set objectives and run campaigns that will benefit their functional area. The more they contribute, the more your company's advocates will contribute to their objectives.

## The executive sponsor

Building positive word of mouth advocacy is a strategic imperative, not a "nice to have" marketing tactic. Therefore, your advocate marketing program needs an executive sponsor.

While ownership of the customer experience can vary from organization to organization based on a number of factors, the advocate program is in the CMO's domain. And unlike other community efforts which have audience building (social communities) or cost reduction and adoption (user communities) as their goal, advocate marketing is aimed squarely at top-line revenue growth through demand generation and pipeline acceleration efforts.

The executive sponsor of the advocate marketing program needs to be an executive who can articulate the "voice of the advocate." The sponsor needs to collaborate with other executives from the sales, support and professional services organizations to ensure your entire company becomes advocate-centric.

Advocate marketing is aimed squarely at **top-line revenue growth**

## The Advocate Marketing Manager

The Advocate Marketing Manager should be part of the marketing organization and have experience managing campaigns. They will own the entire program from initial design and build-out to on-going management.

### **Key responsibilities include:**

- **Program design** - Manage the program design and planning process, setting the first goals and strategy to guide the program moving forward.
- **Identification and onboarding** - Create and manage the programs to on-board advocates.
- **Advocate engagement** - Develop, execute and measure advocate campaigns on an ongoing basis.
- **Metrics and optimization** - Measure the effectiveness of the program by tracking and reporting on operational and strategic metrics.
- **Recognition and reward programs** - Create and fulfill the advocate rewards system.

While knowing and being passionate about customers is critical to this role, the Advocate Marketing Manager should be well-connected internally, too, in order to meet the various advocate marketing program objectives related to other departments, such as sales, product management and customer success.

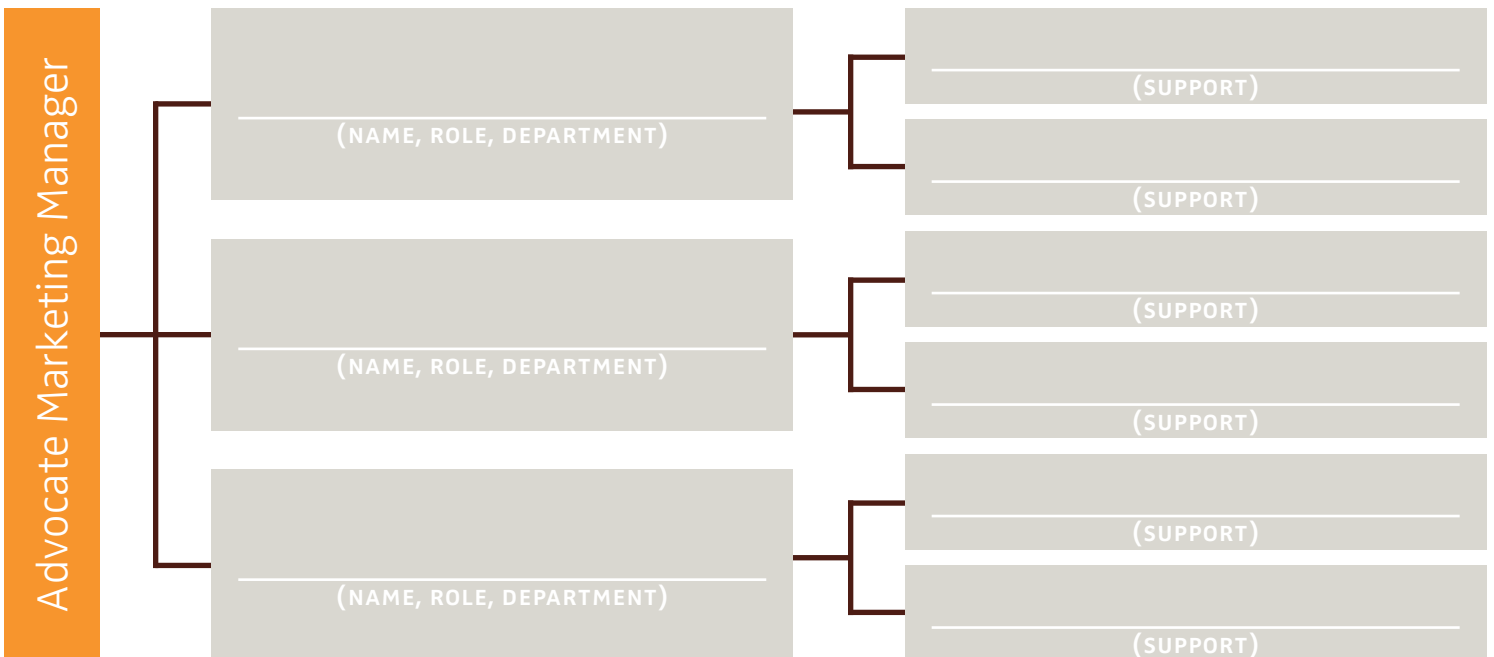
### **The ideal Advocate Marketing Manager:**

- ✓ Knows who your customers are and what drives them.
- ✓ Has experience in online community management.
- ✓ Is passionate about communicating via various social media channels.
- ✓ Can write engaging copy on the fly that will motivate advocates to take action.
- ✓ Thinks outside the box to create a fun experience for your advocates.
- ✓ Has the analytical skills required to measure the success and impact of your marketing programs.

# Advocate Marketing Worksheet

## #2: Organization

✓ Who will sponsor and own the advocate marketing program at your company?
✓ Why is the owner the best person to be in this role?
✓ What support can other team members provide?



✓ How will you measure the success of your advocate marketing program?
✓ Which metrics are required to demonstrate the value of your program?

# Advocate Marketing Technology

Technology plays a critical role in managing the advocate marketing organization. Today, most marketers manage advocate activity using applications like spreadsheets and personal email. Some organizations can identify and engage a handful of advocates in

a manual fashion, but have no process and no underlying technology in place to manage a larger number of advocates in a systematic way.

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Organize, consistently communicate with, and **mobilize** hundreds or **thousands** of advocates

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A technology platform will allow the Advocate Marketing Manager to organize, consistently communicate with, and mobilize hundreds or thousands of advocates. Neither a spreadsheet nor even a CRM application has the right functionality to support this process.

## There are a handful of core requirements to focus on when evaluating technology options:

- **A home for the advocates** – A web portal for the advocates to sign in to find the latest “asks”, stay up-to-date and track their status.
- **The right advocate experience** – There are psychological principles at work in the act of advocacy. Program members need to be engaged, challenged and entertained when answering the call for help. They need instant gratification and recognition for their efforts. They may be seeking status through their advocacy. Advocate marketing platforms keep these principles in play to ensure high engagement and task completion.
- **Basic campaign management** – A communication system that makes it easy to ask the right advocate segments for help on the right kind of campaigns.
- **Advocate marketing management** – An application that is used by the advocate marketing team to manage advocates, asks and recognition.
- **Advocate segmentation** – Certain campaigns and “asks” may only be appropriate for a specific segment of your advocates. Segmentation allows you to group and manage advocates by their persona.

- **Reporting** – Dashboards and reports that provide visibility into advocate activity and program effectiveness.

**In addition to these, there are a couple of more advanced requirements that you may consider:**

- **Gamification** – The ability to ascribe points, badges and other rewards to the various “asks” that advocates can earn over time. Point totals may be presented in a leaderboard or can be used to create various status levels that advocates can attain. Gamification has been proven to increase and maintain advocate engagement.
- **Social interactions** – Allowing advocates to see that other advocates are participating in campaigns, and to interact with other advocates and their social network at large while participating in campaigns, provides a more enjoyable and engaging experience, encourages networking among your advocates, and amplifies the reach of your advocate marketing program as a whole.
- **Rewards fulfillment** – The application tracks the delivery of rewards based on advocate achievement levels.
- **CRM integration** – Advocate activities should be kept in the main customer records of a CRM system for the rest of the organization to leverage.

**When evaluating advocate marketing technologies, keep this checklist handy as you do your research on what each platform has to offer:**

- ✓ An advocate home/portal
- ✓ High-quality advocate experience
- ✓ Basic campaign management
- ✓ Advocate marketing management
- ✓ Reporting
- ✓ Gamification
- ✓ Rewards fulfillment
- ✓ CRM integration

# Use Case: A Technology Vendor's User Conference



Ektron provides web management software that powers corporate websites, intranet portals and social communities. Their advocacy leader built an advocate marketing program focused on their best customers. They decided to mobilize advocates to generate excitement at their annual customer event, Synergy.

Before the event, they created a number of campaigns. A great example of Ektron's successful campaigns designed to drive engagement and get their advocates invested in the event was the "one great song" campaign. They asked advocates to suggest songs for the breaks in between sessions and, because of the popularity of the program, the event's music playlist was based entirely on customer requests.

Overall, Ektron's advocate marketing efforts yielded the following results:

**Dozens**  
of hours of  
customer  
interviews

- 40 customer-generated videos crowd-sourced from advocates for the opening keynote.
- Dozens of hours of customer interviews.
- 90% of conference tracks were customer generated content and, as a result, were oversubscribed.
- 500% increase in "Site of the Year" award submissions for Ektron over the previous year.



03

***5 Steps To A  
Successful Advocate  
Marketing Program***

# Step 1: Planning

Planning is a critical first step in building a successful advocate marketing program. It's important to develop a strategic plan that specifies what the program objectives, process, people and technology are.

## **Key elements of a good plan include:**

### **The program objectives**

The plan should include a mission statement as well as strategic, tactical and operational objectives:

#### **Strategic advocate marketing objectives**

- Increased revenue through customer referrals
- Improved customer engagement
- Shortened sales cycles
- Increased website traffic, SEO rank, etc.
- Improved buyer experience
- Higher win rates
- Better brand recognition and reputation
- Higher customer lifetime value
- Bigger deal sizes
- Lower lead generation and sales costs
- Simpler management and mobilization of customer references
- Higher customer satisfaction

#### **Tactical advocate marketing goals**

- ✓ **References**
- ✓ **Case studies**
- ✓ **Reviews**
- ✓ **Testimonials**
- ✓ **Recommendations**
- ✓ **Social shares**

#### **Operational advocate marketing objectives**

- Total number of advocates
- Number of advocates active and engaged in campaigns
- Number of "asks" each advocate will complete in a given timeframe
- What percentage of advocates redeem their rewards



Plan –  
Recruit –  
**Ask –**  
Reward –  
Analyze –

## **Advocate personas**

Advocate personas help you understand who your advocates are, why they advocate for your organization and which campaigns will be most relevant to them.

You may already have a number of customer segments that you can apply to your pool of advocates, such as industry, company size, location, job function, seniority, products used, etc. However, it's important to keep in mind that you may be reaching non-customer advocates as well, including employees, partners, executives and investors.

## **The advocate marketing process**

Defining a standard process is critical to running multiple advocate marketing campaigns each quarter. This playbook recommends one such process (plan – recruit – ask – reward – analyze), but the most important point is to define a standard process that you'll adhere to. This process will allow your advocate marketing program to become truly scalable.

## **Program owners**

The CMO should own and sponsor the program, but the day-to-day execution of the program should be assigned to someone in a marketing manager-type role. You should also consider creating a company-wide advocate marketing committee with representatives from sales, customer service, product management and other departments.

## **Program campaigns**

Your plan should include the specific types of advocacy campaigns you'll focus on at the outset. A campaign consists of a set of activities designed to achieve a particular objective. For example, a common campaign is to create a certain number of customer case studies. Another type of campaign is to generate a certain number of referrals. Create a quarterly calendar with planned campaigns that will be promoted to your advocates.

# Advocate Marketing Worksheet

## #3: Planning

✓ What is your program's mission statement?

✓ Set some preliminary goals around each of the program objectives you have selected.

✓ Challenge your colleagues across a number of different functions, such as sales, marketing, customer success, product management, etc., to each build a list of at least 20 people they would like to invite into your advocate program.

✓ Brainstorm 10 campaign ideas and workshop them at your next marketing meeting. Discuss:

○ Which objective(s) do they meet?

○ How will you make the messaging around them compelling?

✓ How will you reward your advocates?

✓ Which metrics will you track?

✓ How will you track these metrics?

# Step 2: Identifying And Onboarding Advocates

With a plan in place, you can start identifying your advocates. Recruiting the right advocates early is a critical element of any advocate marketing program and is often the single biggest determinant of whether the program will succeed.

Those first dozen advocates will need to be trailblazers; they will be the first to participate in activities. It is important that they do because the advocates that follow will often base their engagement based on the activity levels of others in the program. If they join a program that seems quiet or subdued, they are less likely to take action themselves.

While recruiting can be challenging, there are a handful of tactics that can help ensure the success of your efforts.

## **Create a plan that details how you'll meet your onboarding objectives**

Consider how many initial advocates you want in your advocate program and what steps will you take to not just invite them into your program, but make them want to join, participate and remain engaged for the long haul. While many companies will be tempted to invite only a small number of advocates to start, to test it out, it is more effective to launch with as many advocates as possible.

Don't underestimate the importance of your invitation copy. Is the tone exciting and engaging? Does it outline why the advocate has been selected to join? Does the program sound exclusive?

## **Answer the following questions as you create your plan:**

1. What's in it for your advocates?
2. How will you make the program sound enticing?
3. What channels will you use to recruit and onboard your advocates?
4. How many advocates will join via each channel?
5. What's the total number of advocates you want to have after one month? One quarter? One year?

## **Early on in the program, use personalized outreach to invite advocates**

Many first-time advocates will need to have a personal conversation to understand the value of the program. If certain advocates have a relationship with a sales person or account manager, enlist these people to understand why you're launching an advocate marketing program and how they should conduct outreach. Think of this process as a personalized selling effort where you'll want to use all of the resources at your disposal to

onboard these advocates. As you enlist the help of sales, make sure they know that their advocates will be taken care of and recognized for their efforts.

- ▷ **Tip:** Some organizations incent their sales and customer success teams to proactively identify and invite advocates using contents and prizes.

### **Sell the program with a personalized pitch**

Most of the customers, fans and partners identified for your first round of invitations should be well known to your company and have already helped support your brand and marketing initiatives. These are the people that you would rely on to speak to members of the media or analysts, or participate in sales reference calls.

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Make sure you express to them why they have been selected to join this program. Point out that their prior activity has been crucial in the growth and success of the company, and that the program has been designed to get them the recognition they deserve for their efforts.

- ▷ **Tip:** Some great invitations include video welcome messages from the CEO or another highly recognizable person in your company. Remember, you want to convey

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**Tip:** Some great invitations include video welcome messages from the CEO or another highly recognizable person in your company

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that this is an important, highly visible program in your organization.

### **Present a small number of advocacy campaigns to these early advocates**

Start with at least 10-15 “asks” that will allow advocates to engage immediately. For example, when recruiting a potential advocate, show them a list of relevant asks and ask them to respond to one. Always remember that building an advocate community involves simultaneously recruiting and engaging advocates.

- ▷ **Tip:** Skip ahead to page 34 for a list of more than 40 advocate marketing campaign ideas.

### **Solicit feedback early and often through personalized interaction**

One of the premises of your advocate program is that it is a better way to listen to your most devoted fans. Put that benefit to work early by getting feedback from your initial members on the invite process, the tone and style of communications, alignment of campaigns to segments, and efficacy of rewards and recognition.

Use this feedback to fine tune the program and optimize engagement with future advocates. Conduct these feedback sessions by individual email or phone, not a blanket survey.

You’ll want to do this early because, while you can always optimize the program, you will want the next wave of advocates to join a program that confidently directs them

In many cases, they're right in front of you

towards action, versus asking the late adopters for feedback right away (and unwittingly suggesting to them that the program hasn't been fully thought out).

### **Scale the program to include more advocates and campaigns**

Once you understand basic onboarding behavior via your trailblazers, you can begin scaling the program. The first step is to identify where you can find additional advocates.

In many cases, they're right in front of you. They may be active on social media, following you on Twitter, commenting on your blog. They may be customers who have already contributed to case studies and testimonials. Your advocates may also be technical users who are active on customer support message boards or frequent participants in beta programs.

## **Advocate Marketing Program Onboarding Tactics**

The great thing about advocate marketing is that it's not just a one-channel initiative. Depending on how open or large you want your own program to be, you may use some or all of the following onboarding tactics:

### **Use email as a scalable recruiting tool**

Email will be one of your most important onboarding channels. You should test a variety of email templates. Some basic ideas to test include:

- A letter from the CEO
- The promotion of content that was recently contributed by advocates
- An update showing growth in the number of advocates
- Articles in the customer newsletter promoting the advocate marketing program

### **Enlist sales and customer support**

Employees from sales and customer support can help enlist advocates in the program in a one-to-one manner. Marketing should provide these "recruiters" with information on target advocates, key campaigns and tools, such as call scripts and email templates.

### **Leverage inbound marketing**

You can incorporate the advocate marketing program into your content calendar. Blog posts, webinars and videos that feature advocates and the success of your program are all good tools for promoting it. Regardless of the type of content you publish, make

sure that there is a strong call to action about participating in the program and that the content links to a landing page where people can sign up as advocates.

### **Use social media**

Facebook, Twitter and LinkedIn are all powerful recruiting tools, particularly for companies that already engage customers, partners and influencers on social media. Use these channels to promote the overall program, specific campaigns and advocates who are active participants.

### **Get your product team involved**

Especially for technical audiences, some of your strongest advocates may be already interacting with product management and engineering teams through user surveys and product beta programs. Canvas these teams to ask which customers are the most active 'hand-raisers' for trying new product features, or who is actively involved in product user groups (either by hosting or speaking).

### **Align your launch with a customer event**

Annual user conferences or customer-oriented conferences are a great place to launch your advocate program. Not do they literally give you a stage from which you can deliver an impassioned call for participation, but physical events typically carry with them a level of excitement that you can tap into to boost membership. Not to mention, events offer opportunities for dozens of types of advocacy that you can put into action – from spontaneous meet-ups and gatherings, to active promotion of keynotes and track sessions from impassioned customers.

### **Looking for executive advocates? Visit the C-Suite**

Customer Advisory Boards, whether formal or informal, are usually staffed by external advocates that are strong supporters of your company's vision and mission. In addition, they are typically seasoned and well-connected business executives who are happy to open doors and recommend your company to others. Customer Advisory Boards are critical sounding boards for your C-suite, but they typically only gather once per quarter – and some may be looking for other opportunities to help. Consider inviting them to your advocate program, albeit in a more exclusive way that carefully selects the right campaigns or asks. They are likely not the right candidates to ask for a product review, but they are perfect for referrals, analyst engagement or media interviews.

### **Make advocacy part of the customer experience**

The advocate marketing program should be embedded in your overall customer experience. For example, when onboarding a new customer, make the advocate marketing program part of the welcome email. You can also promote the program via customer channels, such as the support portal or online customer community.

### **Recognize early adopters and strong advocates**

As the program grows, capture early feedback and success. You can record video testimonials about the program and recognize your advocates by promoting early adopters. You should also champion early successes internally to motivate your colleagues to talk to their customers and prospects about the program.

# Step 3: Engaging Advocates With Campaigns

With a pool of advocates available, you can run various advocate marketing campaigns. A campaign is something that you essentially ask an advocate to do. There are dozens of campaigns that advocates can support, but it's important to keep in mind that all campaigns are not created equal - some may be better suited for newly-onboarded advocates while others are best for experienced advocates. Some common examples include:

- Refer new customers
- Contribute to a piece of marketing content
- Follow or mention the company on a social network (e.g., Twitter, LinkedIn, etc.)
- Review products
- Contribute to a community discussion
- Participate in a beta program
- Take surveys
- Participate in research
- Act as a reference for the sales organization
- Read and share a blog post

Regardless of the types of advocate campaigns you choose to run, there are a handful of best practices you should follow to ensure the success of a campaign

## **Specify your campaign objectives**

You should specify two types of campaign objectives:

1. Define the business objective that the campaign will support, such as new customer acquisition or improved customer satisfaction.
2. Define the tactical objectives, such as the number of advocates that will need to respond to the campaign. It's often helpful to think of these tactical metrics as conversions in a funnel, starting with the total number of available advocates and ending with the number of advocates who respond to the ask.

## **Target campaigns to specific advocate personas**

Successful advocacy campaigns send specific, targeted "asks" to specific target segments.

Specific “asks” should be designed for specific advocate personas. For example, you might create an industry-focused white paper and the “ask” is for advocates to submit two or three paragraphs. The promotion for these “asks” should be sent only to advocates from that industry. Consider the advocate experience

There are three foundational elements that must be included in each campaign that will define the experience the advocates will have as they complete the various campaigns:

1. What you will ask the advocate to do
2. What will constitute valid participation in the campaign
3. How you will reward advocates who participate in the campaign

There are other elements that impact the advocate experience and you may wish to include the following details within your campaigns as well:

- Popularity of the campaign or type of campaign
- Time commitment required
- Level of difficulty or effort

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## **Tip:** Draw inspiration and best practices from your social media campaigns

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### **Spend time on converting advocates**

Many marketers make the mistake of assuming that advocates will simply want to participate in campaigns. They don't spend much time creating compelling asks that drive high conversion rates. Asks should be presented like any marketing offer with good copy and a heavy emphasis on a compelling reason “why” the advocate should participate.

▷ **Tip:** Draw inspiration and best practices from your social media campaigns.

### **Use deadlines and limits to create a sense of urgency**

Your advocates may set the ask aside as they go through their busy days. Creating urgency will help motivate your advocates to take the time to complete a particular “ask” right away. One effective tactic is to set a date when the “ask” will expire. Another approach is to limit the number of people who can participate.

### **Mix campaign types to maintain high engagement**

While you are building your advocate program to increase the effectiveness of your marketing and sales conversions, not every campaign should represent an ask. Mix high value campaigns with purely informational or even entertaining variations. These can be surveys, contests, puzzles or trivia. You can even promote campaigns that profile active members of the community to contribute to that ‘social capital’ that advocates desire,



while also encouraging other members to increase their participation.

### **Alert your advocates about campaigns**

Recruiting advocates for participation in each campaign is the single biggest determinant of advocate marketing success and a one-size-fits-all approach simply won't work here. How you alert your advocates about specific campaigns is dependent on their level of value or difficulty:

- **Low touch** – Advocates should receive consistent updates about new campaigns as they are launched, such as a weekly program digest or newsletter that summarizes this activity via email. The campaigns included in this type of alert should be quick and easy enough to bring your advocates back into the program, where they'll see and hopefully participate in additional campaigns while they're there. While these campaigns are typically low-value, they keep your advocates active and engaged in the program on a regular basis, reducing advocate churn.
- **Medium touch** – Campaigns that are only relevant to a small group of advocates or which allow only a limited number of participants may warrant a real-time email alert, similar to the type of notifications you might receive from a social network.
- **High touch** – Some campaigns are so urgent, specialized or challenging that they require some form of personal outreach, such as a personal email or phone call. High touch alerts ensure your advocates feel that you respect their time and also provide the opportunity to explain exactly what you're looking for beyond a short campaign blurb.

### **Optimize your campaigns**

Make sure you optimize your campaigns by analyzing a handful of metrics that tell you about their performance. For example, track the number of potential advocates for an "ask" versus how many responded. You should also leverage anecdotal feedback from advocates, especially in the initial phases of the program.

Track the number of potential advocates for an "ask" versus how many responded

# 40+ Advocate Marketing Campaign Ideas

Looking for a little advocate marketing inspiration? Choose the most relevant campaign ideas from this list to get your advocate marketing program's first 10 or 15 "asks" up and running.

## **Demand generation**

- Refer a prospect
- Participate in a webinar
- Speak at an event
- Host a customer prospect or site visit
- Schedule a reference call with a prospect

## **Social, brand and reputation marketing**

- Like or follow your company on Facebook, Twitter, LinkedIn, Google+, etc.
- Join your LinkedIn group and post a comment in a discussion
- Read and comment on a blog post (not just your own!)
- Share your latest blog post with their network
- Respond to a third-party LinkedIn discussion or tweet about your company
- Vote for your company to win an award
- Share their Twitter handle with you and their fellow advocates
- Use a hashtag
- Write a LinkedIn recommendation

## **Product marketing**

- Share why they love your product
- Share why they use your product
- Rate and review your product on a review site

## **Inbound and content marketing**

- Share an article about your company or industry
- Spread news about your company
- Subscribe to your newsletter or RSS feed
- Write a guest post for your blog
- Schedule a phone interview for a case study
- Record a video testimonial
- Speak to the press or analysts

## **Advocate marketing**

- Refer an advocate
- Submit a challenge idea
- Provide feedback on the program
- Poll on favorite/least favorite campaigns

## **Events**

- Be a speaker
- Crowd-source event content
- Share event testimonials
- Live tweet using the event hashtag
- Participate in a scavenger hunt
- Be an ambassador
- Event content feedback

## **Customer experience**

- Connect with other advocates
- Submit challenge or reward ideas
- Share LinkedIn groups they belong to
- Read product release notes
- Read best practices and other educational content
- Be entertained – fun challenge
- Share product feedback
- Solve a problem
- Mentor a new customer
- Complete a quiz that allows you to learn more about the advocate on an individual level

# The Anatomy Of A Perfect Ask

Once you've selected your first campaigns, use this ask template to write the copy for them. Try different headlines, descriptions, calls to action and rewards/recognition/feedback to see which ones perform the best.

## Headline

Similar to articles, videos, LinkedIn discussions and other pieces of content, a compelling headline can make all the difference. The headlines for your asks should draw your advocates in and make them interested in completing the action before they read the description or call to action.

## Campaign description

The description should be to the point but also engaging. If your description is too long, advocates won't reach the action stage, so keep it to a few sentences. If you must include a longer description, break up the sentences to avoid scaring your advocates off with a wall of text.

## Call to action

This is the action that you want your advocates to perform, whether it's answering a question, sharing a link or submitting a video. Just like the call to action links and buttons on your website, this call to action should be short and sweet. (Save additional details for the instructions section below.)

## Instructions

Provide additional information about the action, if necessary, so your advocates know exactly what they need to do to complete the task. Be as detailed as possible to avoid frustration as advocates attempt to complete the ask.

## Recognition, reward or feedback

Don't leave your advocates hanging. Let them know what will happen once they complete the ask, whether it's an actual reward, a simple thank you, or next steps within your company (e.g., their suggestion will be discussed at your next product roadmap meeting).

If you have chosen to gamify your advocate experience, this may include the points or badge(s) they will earn if they complete the ask.

# Use Case: An ERP Vendor's Content Campaign

Highest  
converting  
content  
asset in  
their **lead**  
generation  
and  
marketing  
**efforts**

This enterprise asset management company had a very narrow target market of large, highly-competitive global companies in industries such as mining and energy. The company's marketing team wanted to mobilize their very targeted customer community in order to achieve two strategic goals:

1. Drive higher wallet share at current customers.
2. Engage and close new customers.

The company's customers were primarily executives, so the company was limited to one or two asks which had to be carefully thought out and presented to these clients. The company's marketing organization decided to ask their customers to contribute to an eBook on predictions for the future of their respective industries.

Marketing ran a test program with one eBook on the Future of Mining. In the program, they identified top potential advocates (for example, customers who were active participants in their live customer events). They then reached out to these advocates and asked them to submit their predictions. The promotion to these advocates focused on recognition of contributors as thought leaders in a widely publicized, one-of-a-kind piece of contentGuest blogging opportunities

**They received 20 high quality submissions from global executives. The eBook was a huge success and impacted the business in a number of different areas:**

- Widespread, energetic praise for the content from their current customers
- Highest converting content asset in their lead generation and marketing efforts
- Requests from other customers to be included in upcoming content
- Sales meetings with new prospects via the marketing of an eBook featuring their respected customers

The eBook was a launch pad for continued advocate created content and deeper, more trusted relationships with their current customers. The advocates couldn't wait to be included in the company's next content piece.

# Step 4: Recognizing and Rewarding Advocates

A successful advocate marketing program recognizes and rewards people for participating, which is why you need the ability to track advocate participation. Having predetermined milestones that an advocate will be recognized for is a good starting point. You may choose to recognize advocates for participating in specific “asks” or for milestones against their overall advocate activity.

Not all recognition and rewards are created equal, though. While it may be some marketers’ first instinct to give away prizes such as gift cards or iPads to reward advocates, your advocate marketing program will not be sustainable if you rely on “stuff” alone.

After all, your customers don’t advocate for you because they want free stuff. They love your company and, in many cases, they feel like they are part of your team. The ways you recognize and reward your advocates should bring them even closer, essentially dissolving the walls between you and them, giving them a seat of honor at your table.

Borrowing from gamification expert Gabe Zichermann’s “SAPS” model, there are four levels of recognition and rewards you should build into your program, from most desired to least desired: Status, Access, Power and Stuff.

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There are four levels of  
**recognition** and **rewards**  
you should build into your program,  
from most desired to least desired

---

## 1. Status

Advocates want to be publicly recognized for their efforts. Within your advocate marketing program, advocates should be able to continually increase their status by participating in specific campaigns, or after participating in a number of campaigns and accumulating points. Status may designate why, when and how much of the other types of rewards your advocates will get. The higher their status, the better the rewards.

You can reward them by announcing high-achieving advocates on your website, recognizing them at customer events or featuring them in content. Status can come in the form of a virtual title, level or badge within the program itself, for example. Advocates may compete against each other (or challenge themselves) to attain that next status level, keeping them engaged in the program on an ongoing basis.

**“Power”**  
means  
having a  
voice in your  
products

## 2. Access

Sometimes, an advocate’s status may allow them to participate in a unique initiative as part of or outside of the advocate marketing program. In other words, it gives them special access to something, such as a new feature or version of your product before it’s released to the general public, the opportunity to buy tickets to your next event before anyone else or special reserved seating at your user conference.

Access can also be something neither they nor anyone else would normally get, such as a dinner with your CEO or a personal tour of your office.

## 3. Power

For B2B customers and other advocates, “power” means having a voice in building your products, crafting your messaging or even organizing your events. A step above simply providing feedback, a reward in this category may be a one-on-one consultation with your product development team or a trusted advisor role called upon by the leaders of your company.

Advocates may also consider having the opportunity to be a peer mentor to new customers rewarding, as they will be able to teach and shape other professionals as they use your product.

## 4. Stuff

While many organizations want advocates to promote their brand and offerings out of the goodness of their heart, the reality is that incentives with monetary value can drive high participation rates (for a short period of time, anyway).

Dropbox provides the best example of an incentive that works. Dropbox’s top customer acquisition strategy was their referral program where their customers were able to earn extra storage space for successful referrals. Dropbox understood exactly what their customers wanted – more free space – and built their advocate program around this. This type of reward has significant value, but it also deepens the relationship with customers at the same time – an ideal “stuff” reward.

Other companies heavily leverage swag – especially custom-designed giveaways – to drive engagement. Monogrammed shirts, hats and office supplies can help draw in advocates while supporting larger branding efforts. Gift cards, discounts and giveaways are other rewards that can work. These rewards should be used in moderation and, whenever possible, should be exclusive, personal or one-of-a-kind.

Note that marketers need to be aware of emerging guidelines and recommendations concerning disclosure of paid relationships for advocates that are being published by organizations like WOMMA and the FTC. These should be carefully understood and incorporated into advocacy programs to avoid potential conflicts of interest.

# Advocate Rewards And Recognition Ideas

Remember: Not all rewards and forms of recognition are created equal. Each and every one of your advocates has their own unique personality, goals, likes, dislikes, hobbies and style, and the rewards and recognition you provide in exchange for their advocacy should reflect that.

Get to know your advocates so you can surprise and delight them with customized rewards when they're least expecting it.

- ✓ Send a hand-written note
- ✓ Recommend or endorse them on LinkedIn
- ✓ Like, tweet, promote and personally interact with them on social networks
- ✓ Introductions and connections
- ✓ Relevant books (and not just those that you have written)
- ✓ Conference tickets
- ✓ Give to charity on their behalf
- ✓ Their favorite cookies, wine, etc.
- ✓ T-shirt
- ✓ Stickers
- ✓ Pricing discount
- ✓ Free product
- ✓ Subscription to a industry journal
- ✓ Access to an industry report
- ✓ Invite them to speak at your events (offline or online)
- ✓ Allow them to guest blog or contribute to content
- ✓ Feature them in a special series on advocates
- ✓ User conference perks
- ✓ Special badges, seating or recognition at user events
- ✓ Host special events or meetups specifically for advocates
- ✓ Create an elite club and provide access
- ✓ Create customer feedback groups
- ✓ Provide access to the CEO and other executives
- ✓ Participation in product sprints



# Step 5: Analyze

Like most marketing programs, advocate marketing should be measured and optimized over time. As part of this effort, marketing should analyze strategic metrics that show performance against business objectives like advocate revenue contribution. At the same time, marketing needs to pay attention to operational and tactical metrics that highlight things like advocate participation rates.

## Strategic advocate marketing metrics

Strategic metrics should correlate to the business objectives identified in the planning process. Examples include:

- **Lead generation** - Peer referred leads are typically the highest converting. Some estimates put customer referral conversions as high as 10%, whereas typical sales leads convert at a rate of less than 1%. Track the number of leads generated by advocates, what percentage of them convert to new customers, and the average value of advocate-referred deals.
- **Revenue influence and attribution** – Advocates can be a source of revenue (like a referral lead) and an influence on revenue (such as a reference call, product review or case study). Set up rules for direct attribution (source) and influence in your CRM system to better measure the program's revenue contribution.
- **Renewals and upsells** - Engaged, happy customers will renew and purchase additional products, so track renewal and upsell rates for advocates.

## Tactical advocate marketing metrics

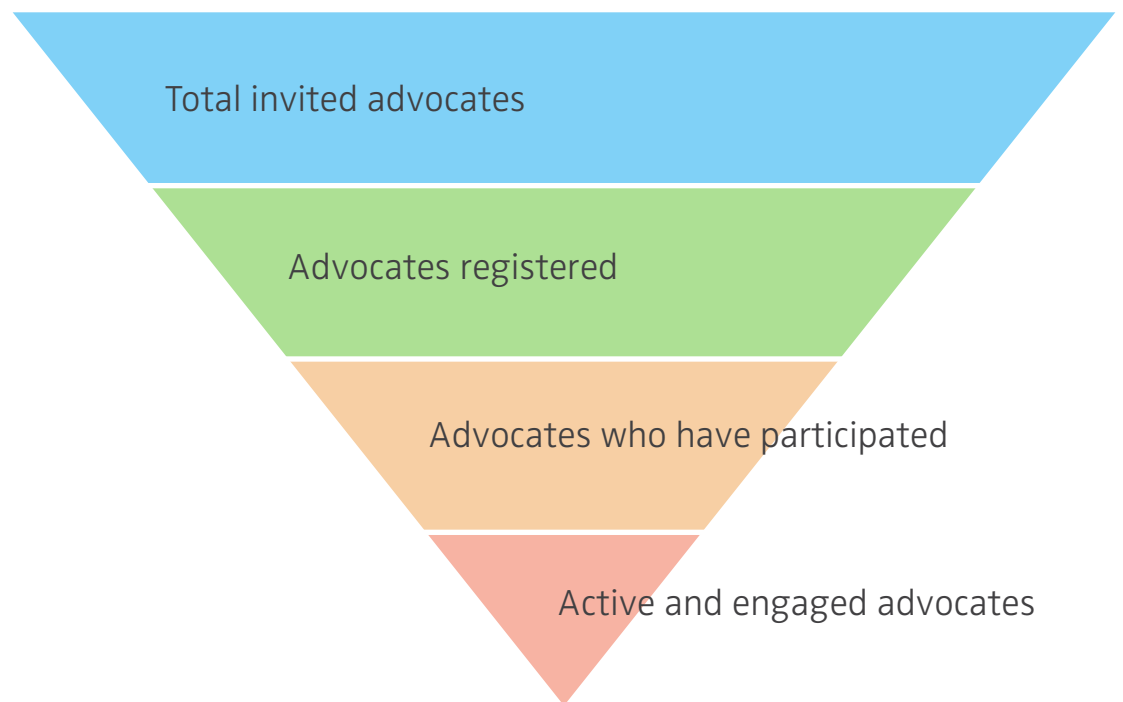
These are the fruits of your advocates' labors. They should be tracked and analyzed against your objectives and compared month over month, quarter over quarter, and year over year.

- ✓ **References**
- ✓ **Case studies**
- ✓ **Reviews**
- ✓ **Testimonials**
- ✓ **Recommendations**
- ✓ **Social shares**

## Operational advocate marketing metrics

Operational metrics track the performance of the advocate marketing program itself. You can think of these metrics as fitting into an advocate marketing funnel, measuring the input and output of your program:

- **Promotion** - Track metrics such as email and landing page conversions. The ultimate metric here, of course, is the number of people who sign up for the advocate program.
- **Initial participation rates** - Participation metrics include tracking the conversion rate for responses to asks, how participation is distributed across the advocate pool, and which types of rewards convert best.
- **Ongoing engagement rates** - Some advocates only participate in the program for a limited time, so it's important to track ongoing engagement with metrics like number of responses per advocate, the number of advocates per campaign.



There are dozens of potential metrics to analyze, but the most important thing is to focus on three to five metrics to start. Track these metrics regularly (try to do this weekly) and take action against them.

In fact, you should use these metrics as the basis for a weekly advocate marketing meeting where you can discuss the performance of the program. The most important part of this meeting is to make sure that you're taking action based on the data. You should pay particular attention to which types of advocates are most responsive to your requests and which types of campaigns perform the best.

In as little as a few weeks, you'll have a good understanding of which advocates deliver the most value, which campaigns drive the most engagement, and which business initiatives benefit the most from the advocate marketing program.

The most important thing is to **focus on 3 to 5** metrics to start

# Sample Advocate Marketing Metrics Dashboard

RECRUITING		CAMPAIGNS		RESULTS	
New advocates invited		Number of campaigns		References	
New advocates on-boarded		Response rate to asks		Case studies	
Total advocates		Avg. responses per advocate		Reviews	
Engaged advocates		Top performing campaign		Testimonials	
		Bottom performing campaign		Tweets	

LEAD GEN		REVENUE	
Referrals		Advocate influenced pipeline	
Qualified leads		Advocate sourced pipeline	
Converted		Influenced revenue	
Avg. value		Sourced revenue	



**04**

***How To Get Started***

# Getting Started With Advocate Marketing

Your advocates are one of sales' and marketing's most powerful assets. The cost for a prospect to connect with their peers is close to zero, and only companies who can leverage their advocates can take advantage of this trend.

Advocate marketing is in the early stages of adoption, but in the next three to four years, the best companies will use advocacy as one of their central organizing principles. These organizations will:

- ✓ Hire executives in charge of advocacy and build departments focused on managing the advocate marketing process.
- ✓ Drive advocacy every day and use their advocate metrics as a core indicator of corporate health.
- ✓ Measure advocacy as a core indicator of customer satisfaction. These companies are moving beyond Net Promoter Scores and identifying and rewarding advocates that are driving real value for their organization.

Today's advocate-focused organizations are showing results that bode well for the coming advocate movement. These companies:

- Build better products, price and promote them properly, and deliver real value because of the relationships they build with their advocates.
- Develop compelling customer-driven content.
- Leverage advocates as their lowest cost, highest converting lead source.
- Receive brand reinforcement and promotion from their advocates – the source that matters most to today's buyers.

Because of the low costs associated with creating an advocate marketing program and the proven results associated with these efforts, it's easy for companies to get started. We hope that our Advocate Marketing Playbook provides the blueprint you need to design and build your own advocate marketing program.

# The Advocate Marketing Process Map

Track your progress through the advocate marketing process by printing this easy-to-use chart. Cross off each objective, activity and deliverable as you go, and refer back to the playbook for additional details and instructions as needed.

Phase	Plan	Recruit	Campaign	Reward	Analyze
Objective	Develop a strategic plan to guide your advocate marketing program	Identify and onboard advocates who will support your program	Engage advocates by asking them to support various advocacy programs	Reward advocates for their participation in the program and support of campaigns	Analyze and optimize your program using strategic, tactical and operational metrics
Key activities	<ul style="list-style-type: none"> <li>▶ Specify the program's objectives</li> <li>▶ Develop advocate personas</li> <li>▶ Define the advocate marketing process</li> <li>▶ Assign ownership and supporters of the program</li> <li>▶ Identify campaigns the program will support</li> </ul>	<ul style="list-style-type: none"> <li>▶ Refer to advocate personas</li> <li>▶ Create a recruiting plan with monthly targets</li> <li>▶ Use email as a key recruiting tool</li> <li>▶ Use social media, inbound marketing, etc., to scale program</li> <li>▶ Enlist sales and customer support</li> </ul>	<ul style="list-style-type: none"> <li>▶ Develop campaigns for advocates to support</li> <li>▶ Specify the campaigns' objectives</li> <li>▶ Target campaigns to advocate personas</li> <li>▶ Ask advocates to support specific campaigns</li> <li>▶ Track advocate engagement rates</li> </ul>	<ul style="list-style-type: none"> <li>▶ Identify rewards and recognition advocates will receive</li> <li>▶ Recognize advocates for participation in program and support of specific campaigns</li> <li>▶ Use a variety of material and non-material rewards as appropriate</li> </ul>	<ul style="list-style-type: none"> <li>▶ Specify strategic metrics</li> <li>▶ Specify tactical metrics</li> <li>▶ Specify operational metrics</li> <li>▶ Set goals for each type of metric specified</li> <li>▶ Measure contributions from other departments</li> <li>▶ Track metrics</li> </ul>
Key deliverables	The advocate marketing plan	Number of advocates onboarded to program	Number of advocates engaged in supporting campaigns	Number of advocates who have received rewards	Weekly and monthly advocate marketing reports

# How To: The 30-Step Advocate Marketing Process

## **Plan**

1. Understand how advocacy can support your business objectives
2. Develop detailed advocate personas
3. Define a standard advocate marketing process
4. Assign the program owners and sponsors
5. Identify the top campaigns the program will support
6. Establish a “home” for your advocates

## **Identify and onboard**

7. Define recruitment and onboarding objectives
8. Rely on email and 1:1 outreach early on
9. Solicit feedback
10. Scale using a variety of recruiting tactics
11. Incorporate social and inbound marketing later
12. Make advocacy part of the customer experience
13. Recognize early/strong advocates

## **Engage**

14. Specify campaign objectives
15. Design asks that are relevant to advocate personas
16. Spend time making campaigns engaging

17. Alert advocates about campaigns
18. Track advocate response/participation rates
19. Acknowledge advocate participation
20. Repurpose high-performing campaigns

## **Reward**

21. Understand what types of rewards your advocates want
22. Design rewards with gamification principles in mind
23. Provide small, easy-to-earn rewards
24. Provide large, hard-to-achieve rewards
25. Allow advocates to publicly promote their achievements

## **Analyze**

26. Identify strategic, operational and tactical metrics
27. Instrument program to capture metrics
28. Hold weekly meeting to review and discuss performance
29. Optimize advocate recruiting efforts
30. Optimize advocate marketing campaigns



# The Advocate Marketing Program Calendar - Monthly

	<b>Plan</b>	<b>Execute</b>	<b>Analyze</b>
<b>WEEK 1</b>	<ul style="list-style-type: none"> <li>▶ Set major campaigns, including start and end dates, for upcoming month</li> <li>▶ Define advocate segments to participate in each campaign</li> <li>▶ Select appropriate rewards for each campaign</li> </ul>	<ul style="list-style-type: none"> <li>▶ Communicate campaigns via appropriate channels</li> <li>▶ Finalize copy and art for Week 2 campaigns</li> <li>▶ Recognize and reward advocates for completing campaigns</li> <li>▶ Invite new advocates to join the program</li> <li>▶ Send company-wide advocate marketing program newsletter</li> </ul>	<ul style="list-style-type: none"> <li>▶ Weekly advocate marketing program report</li> <li>▶ Discuss results of monthly advocate marketing program report with program sponsor (e.g., CMO)</li> </ul>
<b>WEEK 2</b>	<p>Define changes to program based on monthly report and sponsor input</p>	<ul style="list-style-type: none"> <li>▶ Communicate campaigns via appropriate channels</li> <li>▶ Develop engaging communications around campaigns for the next 2 weeks</li> <li>▶ Finalize copy and art for Week 3 campaigns</li> <li>▶ Recognize and reward advocates for completing campaigns</li> </ul>	<p>Weekly advocate marketing program report</p>
<b>WEEK 3</b>	<p>Implement changes to program</p>	<ul style="list-style-type: none"> <li>▶ Communicate new and ongoing campaigns via appropriate channels</li> <li>▶ Finalize copy and art for Week 4 campaigns</li> <li>▶ Recognize and reward advocates for completing campaigns</li> <li>▶ Onboard new advocates</li> </ul>	<p>Weekly advocate marketing program report</p>
<b>WEEK 4</b>	<ul style="list-style-type: none"> <li>▶ Meet with supporters in other departments to:</li> <li>▶ Discuss successes and opportunities;</li> <li>▶ Define campaign objectives for upcoming month;</li> <li>▶ Identify potential new advocates</li> </ul>	<ul style="list-style-type: none"> <li>▶ Communicate new and ongoing campaigns via appropriate channels</li> <li>▶ Develop engaging communications around campaigns for the next 2 weeks</li> <li>▶ Finalize copy and art for Week 1 campaigns</li> <li>▶ Recognize and reward advocates for participating in program</li> <li>▶ Compile successes from the last month for internal advocate marketing newsletter</li> </ul>	<p>Weekly advocate marketing program report</p> <p>Monthly advocate marketing program report</p>

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