

Our Current State: Manual & Reactive

We manage customer advocacy in spreadsheets or ad-hoc tools

Common challenges

- Slow response times for advocate requests
- Risk of overusing key advocates
- Lack of visibility, tracking, and accountability

Consequences

- Missed sales & marketing opportunities
- Erosion of customer goodwill
- Inability to prove program ROI

Why This Matters to the Business

- Advocacy drives revenue: Buyers trust peers more than any other source
- Sales & marketing teams need fast, reliable access to advocates
- Inconsistent reference management = lost deals, wasted time, customer fatigue
- Without visibility, we can't measure or grow impact

A Strategic, Scalable Advocacy Program

- Centralized platform with workflows, automation, and CRM integration
- Match the right customer with the right request—at the right time
- Track usage, engagement, and influence on pipeline
- Protect relationships by avoiding overuse

ReferenceEdge: Built for B2B Revenue Teams

- Salesforce-native technology
- Self-service for sales, marketing & CS teams
- Advocate tracking & capacity management
- ROI & engagement reporting
- Scales as the program grows

dayforce

elastic



databricks

SEISMIC



EPICOR

teradata.

twilio

stripe

Informatica

THOMSON REUTERS

Capgemini

zendesk

DXC
TECHNOLOGY

motive

conga

TriNet

coupa

Paycor

Key Outcomes We Can Expect

- Increase in reference-supported pipeline and closed-won deals
- Faster turnaround on sales reference requests
- Improved customer experience and retention
- Better visibility into program ROI for execs

Implementation Plan & Milestones

- 6-8 week implementation
- Salesforce administration support
- Change management playbook
- Ideal launch date: MM/YYYY

Investment Snapshot

One Time Costs

- Setup: [\$4,500]
- Data migration: [\$1,750]
- Administrator training [\$600]
- End-user training [\$450]

Ongoing Costs

- # Users: [100]
- Cost per user/month: [\$11.34]
- Pain annually: [\$13,608]

Let's Make Advocacy a Strategic Advantage

What's needed

- Investment green light for ReferenceEdge
- Executive sponsorship for launch, and beyond
- Cross-functional alignment to support the program

This isn't a tool—it's a strategic growth lever

ReferenceEdge Resources

- [Why Point of Reference?](#) (video)
- Executive Summary (PDF)
- [ReferenceEdge Explained](#) (video)
- Solution Overview (PDF)
- The Native Advantage (PDF)
- ReferenceEdgeAI (PDF)
- Engagement Essentials (PDF)
- Advocate Gap Predictor (PDF)

Advocacy Across the Enterprise

Stakeholder Group	Reference Types Needed
Sales	Reference calls, customer content, quotes, site visits
PR	Customer quotes, success stories, media interviews
Analyst Relations	Customer perspectives
RFP/Proposal Team	Reference accounts
Events Team	Speakers, panelists, roundtable leaders
Social Media	Guest bloggers, quotes, customer content
Customer Briefing Center	Hosts, videos, quotes
Demand Generation	Videos, case studies, reviews, quotes, webinar hosts
Product Marketing	Beta candidates
Executive Leadership	Clients for earnings calls, speakers
Investor Relations	Customer validation