The Trouble with Pilots

Why a Limited Deployment of ReferenceEdge Often Misses the Mark

A Practical Guide for Setting Up Your Advocacy Program for Success

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Introduction

If you're evaluating ReferenceEdge, and you're thinking about starting small—with a pilot or limited rollout to test things out before making a broader investment. That's a completely natural impulse, and in many cases with new software, it makes a lot of sense.

But here's the thing. ReferenceEdge isn't a single-user productivity tool—it's a collaborative, enterprise-grade system designed to operationalize and scale your advocacy program across Sales, Marketing, Customer Success, and other revenue-facing teams.

Because ReferenceEdge is designed to streamline and scale advocacy across the enterprise, using it in a limited scope doesn't align with how the system is meant to function. It's not that it won't work—but it won't enable the kind of impact it's truly built to deliver.

This guide walks through why that happens, what to watch out for, and how to get the most value from your investment—whether you go big from the start or ease into it.

ReferenceEdge Is Built for Collaboration

Let's start with the fundamentals.

ReferenceEdge connects the people who need customer references (your sales, marketing, success teams and others) with the people who have the relationships with those customers (usually CSMs, account managers, or sellers). Instead of running requests through one central person, the system sends them straight to the relationship owner—saving time and scaling your program.

This peer-to-peer model is what makes ReferenceEdge powerful. But it only works when all the members of both sides of that exchange are in the ecosystem.

If a salesperson submits a request and the relationship owner doesn't have access to ReferenceEdge, the request can't go anywhere. It sits in limbo until it gets kicked up to the program manager, which introduces delays and defeats the purpose of the automation.

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And that's exactly the kind of scenario you're likely to encounter in a pilot.

Why Limited Deployments Can Be Misleading

We get it—starting small feels smart. But with ReferenceEdge, a meaningful assessment is often not possible with a pilot. Here's why:

1. Requests Don't Flow Properly
If only a subset of users are licensed, requests often stall. That makes it look like the system isn't working, when really it's just not fully connected.

2. Too Little Data, Too Little Impact
Pilots usually involve a narrow group—say 100 users instead of 1,000. That often means fewer requests, fewer advocates tapped, and minimal business impact. Not very compelling when you're trying to prove compelling ROI.

3. Scalability Isn't Visible

You might choose a discrete group (like a business unit, geo, or segment) for a self-contained pilot, which is better than no logical organizational boundaries at all—but most teams don't operate in a vacuum. Enterprise collaboration is where ReferenceEdge shines, and that's hard to see in a limited setup.

In short: a pilot doesn't break the system, but it's hard to see what it does best and justify investment.

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Let's Talk Change Management

Introducing ReferenceEdge isn't just about installing new tech—it's about helping your teams work in a more structured, scalable way. That's a change. And as with any change, it takes some intention to get right.

To drive adoption, teams typically need:

- Active support from leadership (not just budget)
- Clear guidance on what behaviors to change
- Training and reinforcement of new processes
- Recognition or incentives to accelerate change
- A little accountability when people go around the system

The kind of impactful behavioral change ReferenceEdge offers requires leadership that's both intentional and actively committed—something that's harder to mobilize when the initiative is treated as an experiment.

And that's not a knock on your team—it's just the reality of how pilots are usually treated. There's often less urgency, less investment, and less follow-through. That makes it hard to drive the kind of behavior change needed to show the system's true value.

Final Thoughts

ReferenceEdge is built to make customer advocacy more efficient, more scalable, and more measurable. But to see that value, the system needs to be fully functioning—and that means enabling both sides of the workflow.

A limited deployment can work, but it comes with trade-offs. It can hide the true benefits of the system, make adoption harder, and lead to unclear results. If a pilot is necessary, go in with clear expectations, strong alignment, and the right structure to give it a real shot.

We're here to help you navigate the rollout in a way that works for your organization. Whether you go big from the start or start small with eyes wide open, we'll be right there with you.

About Point of Reference

Since 2003, Point of Reference has been helping companies turn customer love into measurable results—fueling growth and strengthening brands along the way. With over two decades of experience, we've built ReferenceEdge, the most mature customer advocacy platform out there, designed from the ground up on the Salesforce platform.

Now we're taking things even further by pairing our trusted technology with Agentforce AI to make finding, managing, and activating advocates smarter and faster than ever. And while many software companies stop at the software, we don't. Every client gets a single, assigned point of contact—uncommon, one-to-one support that's become rare elsewhere but central to who we are.

Learn more at www.point-of-reference.com