

Capturing and Keeping CxO Engagement

for Customer Marketing & Advocacy Success

Executive buy-in makes or breaks company initiatives—and because Customer Marketing & Advocacy (CMA) programs touch every corner of the business that taps customer advocates, having leadership on board is particularly important.

Such support is essential not only for securing budgets and facilitating change management, but also for sustaining a program over the long term. Despite its importance, many in the realm of customer advocacy fail to integrate executive input into the program's framework, which can severely limit the program's odds of meaningful success.

The reality is, too many VPs and C-level executives are not fully aware of how CMA programs can strategically advance their business objectives—targets that are directly linked to their own performance assessments. When these programs are seen as nice-to-have or simply a “necessary evil,” they become particularly vulnerable during budget reductions. And whether executives realize it or not, the loss of this function will lead to a diminished competitive edge.



So, how can a program leader circumvent these pitfalls and elevate their CMA efforts?

This eBook delivers specific, effective practices that managers can implement right away to reimagine their approach. The ultimate objective is to establish a formidable competitive edge for your company by orchestrating prolific, intentional CMA activities.

Many managers of customer advocate programs don't realize that executive support doesn't come automatically or out of goodwill. Executives back initiatives that align with how their performance is assessed—contribution to company growth. Initiatives that feed growth survive, the others wither. It's the principle of survival of the fittest in action.

To garner executive buy-in, successful CMA managers must clearly illustrate how their efforts contribute to achieving executive and corporate goals, rather than running a case study factory, or opportunistically building a customer advocate database untethered to strategic objectives.

We present this success blueprint for CMA leaders that ensures relevance to executives and fosters an adaptive strategy for your program so that it remains an essential strategic element.

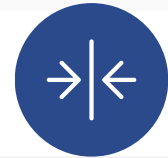


Understand the “What” and “How”

It's a given that companies set their sights on expansion, yet specifics on execution aren't shared beyond executive discussions. A declaration like “We aim to grow by 20%” defines the destination, the “what.” But the roadmap—the array of strategies underpinning this goal—constitutes the “how.” Understanding the “how” is where the details come into play, and they can vary widely. Achieving growth could involve expanding into new markets or regions, innovating service delivery methods, or cultivating a strong network of partners. As a CMA manager, it's your role to delve into these specifics. Only with a deep comprehension of both the objectives and the tactics can you develop a CMA strategy that moves in lockstep with your company's growth trajectory.

Master Company Growth Goals

CMA staff, largely immersed in day-to-day operations, may lose sight of the critical distinction between immediate, tactical tasks and the strategic objectives of executive leadership.



ALIGN
to company goals

It's a common scenario: many CMA managers remain unaware of their CxO's overarching corporate goals, much less how their program's activities can drive organization goal achievement. As a leader in the CMA space, bridging this knowledge gap falls to you. Are you in tune with your company's plans for growth? This information shouldn't be a mystery—it should be foundational, disseminated following annual planning by leadership. If it's not, then it's incumbent upon you to seek it out. Engage with your direct supervisor or even their manager. In organizations that recognize and value synergy, executives expect all employees to grasp and align with the company's vision and trajectory. CxOs understand that the company's success hinges on a unified effort, all rowing in the same strategic direction.

In Deloitte's 34th edition of The CMO Survey, these were the top challenges reported by marketing executives.

Demonstrating the impact of marketing actions on financial outcomes	64.0 %
Focusing data and analytics on the most important marketing problems	51.8 %
Linking marketing investments to important business objectives	41.2 %
Leveraging technology to improve customer value	37.7 %
Communicating the role of the brand in business decisions	37.3 %
Securing cross-functional support for new marketing investments	34.6 %
Infusing customer's point of view in business decisions	24.1 %
Using business terminology that resonates outside of the marketing function	12.7 %

When the right technology is used to power a CMA program, then tracking and analysis, including predictive analysis using AI, creates enormous value for the business, and also the customers in the program. Knowing how customer advocates influence sales, partnerships, and transform the enterprise makes recognizing and rewarding those customers easy and targeted.

An effective CMA program addresses a majority of these pain points. The impact of customer advocates on lead generation, sales opportunity support, and retention is quantifiable.



ALIGN
to company goals

Research and Plan

Think through all of the ways relevant and compelling advocate stories and perspectives can contribute to growth goal achievement so that you can align your program's objectives. This step demands detailed and thorough assessment.

For instance, if targeting international markets is a strategic objective, learn which specific regions are a focus and the reasons they are pivotal. Investigate the unique ways customers in these targeted regions engage with your company's offerings.



ALIGN
to company goals

Begin your analysis with pointed questions such as:

- Which customer advocacy activities are most effective and culturally appropriate in each region (for example, in Asia, testimonial letters are highly regarded)?
- Which marketing activities are most effective for disseminating customer advocacy content, such as webinars, social media, live events, etc.?
- What are the language considerations?
- What stories will most likely capture the attention and interest of these regional audiences?
- Are there sufficient number of advocates in those markets to tell our ideal story?

PRO TIP: Set Your Own Goals

If you ask your leadership, "What are my goals?" or "How is my program going to be measured?" you may receive basic quotas such as, "X new advocates per quarter" or "X new case studies per month this year."

Notice what's missing? Context! Advocates and case studies in support of what specific end goal(s)? Amassing advocates and case studies without a clear purpose is not just inefficient; it's counterproductive.

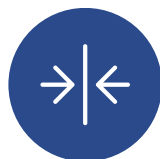
Instead, armed with in-depth research and an understanding of your company's strategic goals, you are the one most qualified to define your program's objectives.

Your goals should not only be qualitatively aligned, but quantifiably measurable.

Design Your Game Plan

Armed with a clear vision of corporate goals, you have what's necessary to begin imagining the possible roles customer advocates can play in achieving them. The next crucial step is to identify the gaps in your current resources—namely, the availability of customer advocates and relevant customer content. This gap analysis will form the foundation of your strategic plan for the program.

Demand is a pivotal component of any gap analysis. You might discover a scarcity of advocates in a specific segment, but if your product in that segment is regarded as the gold standard within the industry, the Sales team might not require a large pool of advocates.



ALIGN
to company goals

However, if the marketing department has earmarked this segment for prominent exposure in their quarterly campaigns, then the need for advocates may be underestimated if you're only considering Sales needs. So, gaps—in isolation—may lead you to the wrong conclusions. Always factor demand into your decisions.

Moving on from the discovery phase, imagine you identify the need for 60 new reference accounts encompassing three target countries. A tactical goal might be to acquire 30 new advocates each quarter for the next two quarters, with one overarching goal of infusing advocate generated content and perspectives (via calls, webinars, social media, etc.) into at least 75% of all Sales activities.

You may also have content objectives, which should align with the Sales demands throughout the buyer's journey, particularly in the targeted regions. This includes crafting content in formats that Sales teams find most useful, whether short-form videos, links to peer reviews, executive summary slides, or detailed ROI case studies.

PRO TIP

Think deep and wide

The value of customer advocates extends far beyond the obvious—like testimonials or customer spotlight videos sprinkled along the buyer's journey. Your CMO will have specific marketing needs in support of revamped ad messaging, new product launches and website assets. Who better to provide invaluable customer experiences than the customers most invested in your success?

Is your company making a foray into a new niche or geography? Your “early adopter” customers in these segments are invaluable as market sentinels, providing crucial insights and real-time feedback. Their firsthand experiences can guide your strategies and offer a genuine pulse on market dynamics.

PRO TIP

Aggregate Stakeholder Insights

Cultivate a broad perspective by synthesizing initial feedback with insights from a diverse set of stakeholders in your organization. Connect with peers in product marketing, business development, and field sales, and merge their input with findings from frontline conversations across Sales, digital, public relations, events, demand gen, etc. This inclusive approach to gathering intelligence will not only refine your program's alignment, but also illuminate any discrepancies that need attention, ensuring a well-rounded strategy that addresses all facets of your program plan.

Build your plan with precision, setting clear quarterly targets that strike a balance between quick wins and longer-term, high-impact projects. Demonstrating early progress is as crucial as maintaining momentum on more extensive initiatives that may take time to unfold. Remember, the vast majority of CMA goals should tie to company goals.



ALIGN
to company goals

Equally important to managing upwards for CxO alignment is the need for cross-departmental synergy. Collaborating with peers across various departments not only solidifies the CMA program's role as indispensable, but also ensures your objectives are comprehensively informed and supported.

Surprisingly, alignment with company growth strategies is not a given. However, the CMA program's "product" is valuable to many departments in an enterprise. The CMA program is uniquely positioned to help a marketing executive secure "cross-functional support for new marketing investments," a top challenge uncovered in Deloitte's, The CMO Survey.

This may come as a surprise, but while understanding your CMO's objectives is essential, don't take for granted that she is perfectly aligned with the CEO's vision for growth. Be sure your budget justification clearly showcases the CMA program's direct impact on achieving the CEO's overarching growth objectives.



ALIGN
to company goals

Socialize Your Plan

With your comprehensive plan and defined objectives in hand, it's time to engage your executive stakeholders. Your blueprint will likely be under the purview of the Marketing VP or CMO in terms of budget allocation, but the Sales VP or CRO may represent the largest group of internal stakeholders.

Assuming you've meticulously tailored your plan to address core stakeholder needs, your next move is to secure their support both in terms of funding and participation in the change management process. A full 70% of company initiatives fail as a result of ignoring or mismanaging the change involved.

Regular interaction with your internal stakeholders is crucial; they're not just the audience for your program's outcomes, they're active participants. The impact of making your program known and understood is crucial. While initial announcements about the program's purpose and benefits set the stage, to truly embed the customer advocate program into the organizational fabric, you must gain and maintain visibility.

This means securing a spot on the agenda at stakeholder team meetings, as well as establishing a presence on messaging/collaboration platforms like Slack or Teams. Consistent dialog with stakeholders—we strongly encourage forming a program advisory board—is the key to building the widespread engagement necessary to turn your program into a force for tangible results.



EXECUTE
to meet goals

Make it Happen

With research complete, insights in hand, and objectives crystal clear, you're poised for the most crucial stage: plan execution. Here's where you translate strategic vision into reality through tactical actions and daily decisions.

Let's confront the practical challenge of strategic execution. For many marketing managers, maintaining strategic focus amidst a sea of "urgent" demands is a constant battle. Yield too frequently to these demands, and you risk veering off course from your strategic objectives. Conversely, an overly rigid approach that ignores evolving needs and serendipitous prospects can be equally detrimental to quick wins.



EXECUTE to meet goals

A CMA leader must navigate the ever-evolving demands of the stakeholders she empowers. Consider the scenario where a salesperson is on the cusp of a major deal but requires an eleventh-hour reference or supporting material not in the current library—you don't simply dismiss the request. Your program must be adaptable, capable of responding to such pivotal moments without becoming unmoored from its foundational goals.

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How can you manage it all? The simple answer is: you can't—not alone. It's essential to harness technology to automate routine tasks, freeing you to address these critical, unplanned opportunities without losing momentum on your overarching strategy. After the fire drill has passed, take time to review the events that led to that moment and work with those involved to avoid repeating history, as much as possible.

PRO TIP Staying on Track

The key to a successful CMA program is maintaining laser-sharp focus on your strategic plan while judiciously weighing the impact of emergent requests and unforeseen opportunities. When faced with a request from an internal client or a directive from leadership that falls outside your planned activities, it's crucial to communicate transparently with your stakeholders about potential shifts in your program's trajectory.

Before pivoting to accommodate new tasks, consider:

- How important is this new activity to your company and program?
- What resources will need to be allocated/diverted to achieve the result?
- How exactly will taking on this new activity impact your ability to meet your original goals?
- Is this a one-off fire drill or a new direction for the company that requires the CMA program to reevaluate and set new goals?

PRO TIP

Framing Outcomes for Leadership

There are several compelling reasons to align your reporting with leadership's focus on revenue goals: a) it can lead to an increased budget for your activities, b) positions your program as integral to strategy, and c) ensures your inclusion in key strategic discussions, enhancing your program's influence.

Share Relevant Results

For CMA leaders, focusing on tactical metrics is instinctive. These figures demonstrate volume and efficiency despite not being directly linked to the C-suite's broader ambitions. To gain executive buy-in, it's essential to translate these metrics into strategic outcomes.



COMMUNICATE
contributions

Take, for instance, a goal like increasing international market share.

Here's a snapshot of how your program's impact on Sales could be reported:

- **Deal Impact:** Highlight the count and cumulative value of international Sales opportunities influenced by the program
- **Targeted Content Output:** Detail the specific content created to bolster international Sales efforts, demonstrating alignment with strategic initiatives
- **Distribution Effectiveness:** Outline how this content has been shared with Sales teams, emphasizing the method and reach
- **Advocate Acquisition:** Quantify the growth in international customer advocates, showcasing expansion and engagement
- **Strategic Gaps and Tactics:** Identify ongoing challenges and articulate your strategy to address them, ensuring alignment with broader company goals



COMMUNICATE contributions

Establish a direct line to communicate CMA program outcomes to your leadership team. Don't assume they're aware; actively request their feedback.

When it comes to sharing your CMA program's results with leadership, format matters. Present the information in the way they prefer so nothing gets in the way of them absorbing the message—executive assistants can be a great resource for pinpointing the ideal format.

Set up regular reviews with end-user stakeholders to share results and align on possible adjustments. Consider forming a program advisory board—trusted stakeholders and conduits of feedback, who not only guide strategy but also serve as ambassadors for your program in the field.

Use quarterly scorecards and/or implement dashboards, ensuring the program's impact on company goals is evident to all relevant CxOs.

PRO TIP

Practice Polite Assertiveness

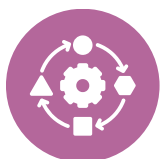
Don't just wait for an invitation to stakeholder team calls and meetings; actively seek out opportunities to participate.

Assert yourself to secure a spot and clearly outline your objectives for that time:

- Solicit feedback
- Introduce new resources
- Share advocate successes as best practices
- Provide program/process training

Stay in regular touch with those who organize meetings, and be firm about securing your participation. Your visibility, the face of the CMA program, fosters strong connections, which are key in this relationship-driven role.

Pivot with Change



ADAPT
to change

Adapting your program to align with evolving company goals is ongoing, not a one-off event. The CMA program must be agile, responding to the shifting landscape of each revenue cycle with its unique set of challenges, opportunities, and priorities.

- Regularly reassess and align with the company's top objectives
- Adapt your program effectively to support changes
- Clearly communicate the outcomes
- Iteratively refine your strategy, incorporating insights with each cycle
- Review strategy changes with leadership to ensure alignment, support

In Summary

For CMA leaders, aligning with company growth goals involves transcending daily tasks to focus on strategic objectives. This process starts with thorough research and detailed assessments to understand company growth priorities, resource gaps, and advocate demand. Once objectives are clear, the next challenge is plan execution, where maintaining strategic focus amidst ongoing urgent demands is crucial.

Managers must balance this with adaptability to stakeholder needs and changing customer advocate needs. Effective execution also requires maintaining direct communication with leadership, leveraging their support in change management, and using tools like dashboards for progress monitoring. This journey involves managing tactical demands and leveraging technology to automate routine tasks, so that you can focus on critical opportunities and maintain alignment with their overarching strategy.

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