

You know your company needs a customer advocacy program but aren't sure how to make the case. This checklist is your roadmap. Each step helps you collect the evidence, allies, and executive alignment needed to turn advocacy from "nice to have" into a strategic must-have.

Customer Advocacy Program Business Case Checklist

Inventory advocacy pain points

The results of not having a formal customer advocacy program are visible in many departments: sales, marketing, PR, demand gen, events, RFP, etc. Interview your peers, survey sales, and compile as complete a list as possible. Include any fresh incidents (e.g., deal lost, couldn't find a compelling reference). Paint a clear picture of the cost of doing nothing.

Pain Points

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Align with company growth goals

Many company goals, such as entering new markets or launching new products or partnerships, depend on customer advocates. Review top company goals then map how an advocacy program would directly support those outcomes.

Company Goal / Program Alignment

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Articulate program metrics

Executives care about measurable impact. Identify metrics that matter most to them, such as influenced revenue, win rates, and pipeline velocity. Demonstrating how the program ties to performance metrics helps mitigate concerns about wasted budget or weak ROI.

Important Program Metrics

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Itemize hard-to-quantify benefits

Not all positive outcomes of a program can be measured, but they still deliver significant value. The productivity, job satisfaction, brand perception, and even customer satisfaction, all benefit. Collaborate with other departments to capture these "soft" wins—they're often the ones people feel most acutely.

Hard-to-Quantify Benefits

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Leverage expert data

Support your case with credible sources—analyst reports, research studies, or vendor data. For example, Gartner found a 18–25% lift in win-rates when advocates were used—a stat too powerful to ignore.

Credible Statistics

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Join forces

Build momentum across stakeholder teams. The more departments that echo the need, the message is louder when it reaches the C-suite. Be sure to include the benefits to all relevant departments such as marketing, sales, PR, and customer success in your proposal. Consider co-funding the initiative.

Stakeholder Departments

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Enlist managers, coordinate peer influence

Don't stop after getting your peers in other departments onboard, arrange discussions with the heads of those departments and ask them to express support to the leader with the budget. A few timely nudges from respected leaders can accelerate approval dramatically.

Stakeholder Department Managers Enlisted

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Packaging/Proposal

All the work you put into building the case for a customer advocate program won't matter if you don't deliver it to the right audience and in the right way. Ask yourself the following questions:

- Know your audience and how they like to consume information.
- What's best for your situation, giving the decision maker(s) a) something to read or watch, or b) making a live presentation?
- Either way, lead with the company pain—it's your hook.
- Clearly connect the dots between advocacy and company goals.
- For live presentations, invite influencers who carry informal sway.