Change That Sticks

Achieving Lasting User Adoption of Customer Advocacy Programs & Technology

Using the ADKAR® Change Management Model to Drive Success with ReferenceEdge®

Introduction

Launching a customer advocacy program—and investing in enabling technology like ReferenceEdge—can provide B2B organizations with an undeniable competitive advantage. But long-term success isn't defined by launch dates or vendor capabilities. The real measure of success is user adoption.

If the people you rely on—sales teams, customer success managers, marketers, and executives— don't use the system consistently, your advocacy program won't gain traction. The database will stay sparse. Customer advocates will be underutilized. And requests for proof, references, or stories will revert to email threads and spreadsheets.

Adoption isn't accidental. It's the product of intentional, well-managed change. The ADKAR model, developed by Prosci®, is a practical framework for driving individual change at scale.

ADKAR stands for:
- **Awareness** of the need for change
- **Desire** to participate in and support the change
- **Knowledge** on how to change
- **Ability** to implement new skills and behaviors
- **Reinforcement** to sustain the change

> "When leaders engage early and often, resistance has nowhere to hide."

In this guide, each stage is explored in depth. You'll find narrative insights followed by bulleted tactics designed to help you activate and sustain adoption at every level of your organization.

Stage 1: Awareness

Create Shared Understanding of the Need for Change

Awareness is the first—and most crucial—step in the change process. It's not enough to inform people that something new is coming. You need to communicate why the change is happening, what problems it will solve, and how it connects to business goals.

People tend to resist change when they don't understand it. They may feel caught off guard, question its relevance to their role, or assume it will be more trouble than it's worth. Without context, the rollout of a tool like ReferenceEdge can feel like "yet another system" with no clear value.

The goal of this stage is to ensure every audience understands the why. The more clearly you communicate the need, the more open people will be to participating.

> "Projects don't fail. People fail to adopt them."

► Tactics to Build Awareness

- Craft role-specific messaging that connects to pain points:

  - For Sales: "ReferenceEdge eliminates guesswork when you need customer proof during a deal."
  - For Marketing: "Access advocate stories and quotes instantly for high-performing campaigns."
  - For Customer Success: "Make your customer wins visible by nominating advocates directly."

- Launch a branded internal awareness campaign:

  - Give your advocacy program a name and logo for internal use.
  - Use teaser emails, countdowns, or "coming soon" Slack posts.

- Present a before-and-after vision:

  - "Today: 4 days to fulfill a reference request. Tomorrow: 4 minutes."
  - "Today: Advocates are hidden in spreadsheets. Tomorrow: Find the right story in seconds."

- Use internal data to highlight missed opportunities:

  - "Only 30% of deals get supported by a reference today."
  - "Marketing has 50 great customer stories—but most aren't being used."

- Leverage leadership visibility:

  - Ask execs to share why advocacy matters in all-hands or video updates.
  - Include program goals in sales or marketing kickoff events.

Awareness is about telling the story—why this matters now, how it will make their jobs easier, and what the organization stands to gain.

Stage 2: Desire

Build Willingness to Embrace the Change

Even when people understand the need for change, that doesn't guarantee they'll want to engage with it. Desire requires an emotional commitment—one built on relevance, credibility, and trust.

In this stage, you must address common sources of resistance. These might include tool fatigue, bad experiences with previous rollouts, or simple inertia. People need to see that the change benefits them directly.

Desire is often cultivated peer-to-peer, not top-down. The more people see their colleagues using and valuing the program, the more likely they are to follow suit.

▶ **Tactics to Generate Desire**

> "Technology changes nothing without behavior change."

- Articulate clear personal benefits:

  - "Find proof points for deals in minutes—not hours."
  - "No more chasing Sales Ops for the same customer story."
  - "Get recognition for your successful customer relationships."

- Leverage social proof and early champions:

  - Enlist pilot users or influencers to share what they love about the program.
  - Feature short video testimonials or Slack messages from real users.

- Gamify early adoption:

  - Launch a leaderboard for top users.
  - Reward milestones: first nomination, first successful reference, etc.

- Offer real incentives during rollout:

  - Give gift cards for most nominations.
  - Recognize early adopters in team meetings or internal newsletters.

- Tie usage to existing performance goals:

  - Make advocate nominations part of CSM scorecards.
  - Highlight how using ReferenceEdge supports faster deal velocity.

Desire must be earned through thoughtful communication, visible impact, and positive reinforcement. People need to believe in the change, not just comply with it.

Stage 3: Knowledge

Provide the Training and Resources to Take Action

Once people want to participate, they need to understand how. This means giving them clear, practical knowledge to navigate the program and technology.

Don't assume a single training session will suffice. Learning needs to be continuous and contextual. Role-based training ensures users only see what's relevant to them—and aren't overwhelmed with unnecessary information.

You'll also need to account for different learning styles. Some users prefer hands-on walkthroughs. Others want self-paced resources or short video clips they can watch as needed.

▶ **Tactics to Deliver Knowledge**

- Create tailored training for each audience:

  - Sales: How to search for and request a reference.
  - Marketing: How to find, tag, and deploy advocate content.
  - CS: How to nominate a customer and track participation.

- Provide training in multiple formats:

  - Live team sessions or QBR demos
  - Short screencasts (1–3 minutes) on common tasks
  - Written guides or checklists pinned in team channels

- Build knowledge into onboarding:

  - Include ReferenceEdge in onboarding for new Sales, CS, and Marketing hires.
  - Assign a team buddy for first 30-day adoption check-ins.

- Keep learning accessible:

  - Embed "how to" tips directly into the app experience.
  - Maintain a living FAQ or resource hub on your intranet.

- Track engagement and reinforce learning:

  - Monitor who has completed initial training.
  - Follow up with refresher sessions for low-engagement teams.

> "People don't resist change. They resist being changed."

The goal of the Knowledge stage is confidence. People should feel empowered to use the system with ease—without having to ask for help every time.

Stage 4: Ability

Enable Real-World Application and Fluency

Knowing what to do isn't the same as being able to do it comfortably and consistently. In this stage, your focus shifts to helping users apply what they've learned in their actual workflow.

For some users, the fear of "messing up" or slowing down work will prevent them from using the system unless they're actively supported. For others, occasional usage (e.g., once per quarter) means they forget what they learned.

That's why ability-building must include repetition, access to support, and recognition of successful behavior.

> "If you want people to own the change, they need to see themselves in the solution."

► **Tactics to Strengthen Ability**

- Create opportunities to practice in real-time:

  - Run "Reference Match Challenges" during sales standups.
  - Role-play nominations during CS team calls.

- Offer help at the moment of need:

  - Enable in-app chat or on-demand walkthroughs.
  - Post a "Need help with ReferenceEdge?" pinned message in team Slack.

- Celebrate small wins to build momentum:

  - "Rachel submitted her first nomination—check it out!"
  - "Luis used a customer story that helped Marketing hit their Q2 goal."

- Host regular power user panels:

  - Invite high-usage team members to show how they use the system.
  - Share their tips and shortcuts to boost confidence among peers.

- Track ability gaps and follow up:

  - Review usage dashboards weekly.
  - Reach out to low-activity users with personal support offers.

Ability becomes mastery when people practice in context. Make it safe to try, rewarding to succeed, and easy to recover from missteps.

Stage 5: Reinforcement

Sustain Change and Make it Stick

Without reinforcement, even well-adopted programs begin to fade. People revert to old habits, especially under time pressure or shifting priorities. This final stage is about embedding usage into the fabric of everyday work.

You need to maintain visibility, reward consistent users, and ensure executive leaders continue to endorse and expect program engagement.

Most importantly, you must demonstrate business impact—showing how advocacy activities are helping the organization reach its goals.

► **Tactics to Reinforce and Sustain Adoption**

"What leaders model, people mirror."

- Create shared visibility into adoption metrics:
    - Share usage dashboards in team meetings.
    - Include adoption stats in QBRs and leadership reports.
- Recognize top contributors regularly:
    - Highlight "User of the Month" for most impactful use of ReferenceEdge.
    - Celebrate successful advocate stories in internal newsletters.
- Embed the program in business processes:
    - Make advocate identification part of customer onboarding and QBR templates.
    - Require marketing campaigns to include advocate content planning.
- Use reference wins to tell a bigger story:
    - "Thanks to advocate support, this $900K deal closed in half the expected time."
    - "These five advocates generated three case studies and two webinars this quarter."
- Renew executive sponsorship:
    - Ask leaders to call out program milestones in town halls.
    - Ensure executive team sees ReferenceEdge as a strategic platform—not a side project.

Reinforcement is where change becomes culture. When success is visible, recognized, and aligned with broader goals, advocacy becomes a habit—not a task.

Conclusion: Driving Lasting Adoption, One User at a Time

Implementing a customer marketing and advocacy program, along with enabling technology like ReferenceEdge, is a strategic investment. But its value is only realized when people across your organization adopt it—not once, but as part of how they work every day.

The ADKAR® model gives you a structured, practical framework to lead this transformation. It helps you manage the people side of change by guiding them from awareness to sustained use.

By embedding these stages into your rollout and reinforcement plan, you ensure that your advocacy program doesn't just get launched—it gets lived.

ADKAR at a Glance: The Adoption Roadmap

Stage	Objective	Key Action
Awareness	Create understanding of the need	Internal campaign, executive visibility, pain point messaging
Desire	Build motivation to support change	
Knowledge	Provide the "how to"	Peer champions, gamification, WIIFM messaing
Ability	Enable action with support	Role-based training, guides, onboarding modules
Reinforcement	Sustain adoption long-term	Practice scenarios, coaching, recognition Dashboards, executive support, cultural embedding

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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 360 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.

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