point of reference®

AWARE Metrics Companion Guide
How to Define It, Do It, & Defend It

A - Adoption

% of feature/functionality adoption
- **Definition**: Tracks how many customers use a specific feature or functionality.
- **Calculation**: (Number of customers actively using feature ÷ Total customers with access to feature) × 100
- **Business Value**: Proves ROI of product development and helps prioritize roadmap investments.

Time saved by stakeholder group leveraging process
- **Definition**: Measures efficiency gained from new processes supported by advocacy.
- **Calculation**: (Average time before process – Average time after process) × # of tasks completed
- **Business Value**: Demonstrates operational efficiency, reduces costs, and highlights advocacy as a productivity enabler.

Active user ratio
- **Definition**: Compares active vs. total registered users.
- **Calculation**: (Number of active users ÷ Total registered users) × 100
- **Business Value**: Signals health of advocacy program engagement; higher ratios indicate strong stickiness.

% of stakeholders using tools/processes
- **Definition**: Measures adoption of internal tools (e.g., advocacy platform) by sales, marketing, customer success
- **Calculation**: (Active stakeholders using tool ÷ Total stakeholders with access) × 100
- **Business Value**: Ensures ROI on technology and processes; higher adoption = higher returns.

Money saved by stakeholder group leveraging advocates/assets
- **Definition**: Quantifies cost avoidance by using advocacy vs. alternative resources.
- **Calculation**: (Estimated cost of alternative resource – Cost of advocacy solution) × # of instances
- **Business Value**: Shows customer advocacy reduces spend on external analysts, consultants, or content creation.

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W – Win Rates & Deal Acceleration

Overall win rate with vs. without advocacy

- **Definition**: Compares success rates of deals supported by advocacy vs. not.
- **Calculation**: (Deals won with advocacy ÷ Total deals with advocacy) vs. (Deals won without advocacy ÷ Total deals without advocacy)
- **Business Value**: Proves advocacy accelerates revenue and improves close rates.

Advocate-sourced pipeline

- **Definition**: Revenue from referrals, community leads, or unsolicited references.
- **Calculation**: Sum of deal values where source = advocate.
- **Business Value**: Shows advocacy creates net-new revenue opportunities.

Stage conversion improvements

- **Definition**: Tracks conversion rates at pipeline stages when advocacy is introduced.
- **Calculation**: (Number advancing to next stage ÷ Total in stage) × 100 with vs. without advocacy asset.
- **Business Value**: Demonstrates advocacy reduces friction in the buyer journey.

Stage advancement improvements

- **Definition**: Measures incremental deal progression tied to advocacy.
- **Calculation**: Track time-to-next-stage or % of opportunities advancing post-advocacy.
- **Business Value**: Proves advocacy accelerates velocity and improves forecasting confidence.

Competitive win rate with vs. without advocacy

- **Definition**: Focuses on competitive scenarios.
- **Calculation**: (Competitive deals won with advocacy ÷ Total competitive deals with advocacy) vs. (Competitive deals won without advocacy ÷ Total competitive deals without advocacy)
- **Business Value**: Shows advocacy gives competitive edge and market differentiation.

Advocate-influenced pipeline

- **Definition**: Revenue from opportunities where advocacy influenced (e.g., webinar guest).
- **Calculation**: Total influenced opportunity value tracked in CRM.
- **Business Value**: Demonstrates how advocacy amplifies pipeline creation, not just support.

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A – Advocate Availability & Accessibility

of active references by organizational goals

- **Definition**: Size and alignment of advocate pool.
- **Calculation**: Count of advocates active in past 12 months, segmented by goal (e.g., industry, product).
- **Business Value**: Ensures sales/marketing have the right advocates to meet demand.

Request volume vs. fulfillment rate

- **Definition**: Ratio of advocacy requests filled vs. made.
- **Calculation**: (Requests fulfilled ÷ Total requests) × 100
- **Business Value**: Demonstrates scalability and effectiveness of advocacy ops.

Fulfillment SLA for advocacy

- **Definition**: Average time to fulfill advocacy requests.
- **Calculation**: (Total time from request to fulfillment ÷ Number of requests)
- **Business Value**: Faster fulfillment accelerates deals and builds internal trust.

Advocate win rate

- **Definition**: Effectiveness of advocates in helping close deals.
- **Calculation**: (Deals won where advocate was used ÷ Total deals where advocate was used) × 100
- **Business Value**: Identifies "power advocates" and best-fit stories.

Advocate invitation acceptance rate

- **Definition**: % of invited customers who agree to advocate.
- **Calculation**: (Accepted invitations ÷ Total invitations sent) × 100
- **Business Value**: Gauges trust and willingness to engage without inflating advocate counts.

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R – Retention & Expansion

Retention rate (advocates vs. non-advocates)

- **Definition**: Compares churn of advocates vs. non-advocates.
- **Calculation**: (Customers retained ÷ Total customers) × 100 (segmented by advocacy status)
- **Business Value**: Shows advocacy correlates with loyalty.

Expansion rate (advocates vs. non-advocates)

- **Definition**: Measures upsell/cross-sell success by advocacy segment.
- **Calculation**: (Customers with expansion ÷ Total customers) × 100
- **Business Value**: Links advocacy to ARR growth.

Expansion rate (when advocacy leveraged)

- **Definition**: Compares expansion success when advocacy is used.
- **Calculation**: (Expansion deals influenced by advocacy ÷ Total expansion deals) × 100
- **Business Value**: Shows advocacy accelerates upsell motions.

Retention rate (when advocacy leveraged)

- **Definition**: Compares retention where advocacy was engaged.
- **Calculation**: (Retained customers who acted as advocates ÷ Total advocate customers)
- **Business Value**: Demonstrates direct loyalty lift.

Expansion & retention rates for unique advocacy groups

- **Definition**: CAB, PAB, community, champions.
- **Calculation**: Track segment-specific retention/expansion using CRM data.
- **Business Value**: Identifies which programs drive the strongest revenue impact.

% of available licenses issued (advocates vs. non-advocates)

- **Definition**: Measures utilization within advocate vs. non-advocate accounts.
- **Calculation**: (Issued licenses ÷ Total purchased licenses)
- **Business Value**: Advocates drive fuller product adoption = higher account value.

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E – Experience & Engagement

NPS by journey stage (YOY)
- **Definition**: Net Promoter Score at onboarding, renewal, etc.
- **Calculation**: (Promoters % – Detractors %) segmented by stage and compared YOY.
- **Business Value**: Shows advocacy boosts loyalty across lifecycle.

CSAT by journey stage (YOY)
- **Definition**: Satisfaction at support, onboarding, renewal.
- **Calculation**: (Sum of positive responses ÷ Total responses) × 100
- **Business Value**: Links advocacy to better customer experiences.

CES by journey stage (YOY)
- **Definition**: Customer Effort Score on specific tasks.
- **Calculation**: Average score from CES surveys.
- **Business Value**: Advocacy reduces effort by providing peer guidance and insights.

Customer Health (with advocacy tracked)
- **Definition**: Overall health score for advocate vs. non-advocate accounts.
- **Calculation**: Composite of usage, support, sentiment, renewal risk.
- **Business Value**: Proves advocacy predicts retention success.

Third-party validation (G2, GPI, etc.)
- **Definition**: External review sites influenced by advocates.
- **Calculation**: Count/score of reviews linked to advocacy programs.
- **Business Value**: Builds trust with buyers and analysts.

Customer Lifetime Value (CLTV: advocates vs. non-advocates)
- **Definition**: Long-term revenue from advocates vs. others.
- **Calculation**: (Average annual revenue × Average customer lifespan) per segment.
- **Business Value**: Shows advocates are more profitable long-term customers.

Customer community lifecycle engagement
- **Definition**: Tracks progression from join → act → participate → advocate.
- **Calculation**: % of community members advancing through engagement milestones.
- **Business Value**: Shows how community nurtures future advocates and expands influence.