

Essential Buyer Questions

Evaluating a Customer Advocacy Management Solution

Program Management Support

How does your technology drive user adoption?

Deploying technology is half the equation. Changing behavior requires organizational support, awareness, education and incentive. Ask how the solution helps with user re-programming, and what change management support the vendor provides.

How will your technology help me build my advocate database?

Many companies start with reference contact information stored in a variety of places. A critical mass of reference accounts and contacts is needed before launching a customer reference management program. Ask how the solution supports database growth and what best practices the provider offers.

How does your solution help me quantify the value of my program?

Program credibility depends on demonstrating value. Ask what reporting and dashboard capabilities are available and how the provider helps correlate program activity with company growth objectives.

How does the technology help us identify new reference customers?

Reference customers change over time. Ask how the solution keeps data current and ensures reliable search results to prevent users from bypassing the system.

How does your solution help us keep reference information current?

Reference information will become outdated. You need a way to continuously update data without overburdening any one team while maintaining user trust.

How does the solution help us scale the program?

Reference programs are often understaffed. A strong solution automates tactical processes so program managers can focus on strategic initiatives.

Program Management Support Continued

What reference request management models does your application support?

Every company is different. Whether you require white-glove service or a scalable self-service model, the system should provide flexible options.

How does your solution handle customer content management?

Sales teams rely on case studies, videos, and customer content. The system should provide strong search functionality, easy sharing, and the ability to correlate content usage to closed opportunities.

How is reporting accomplished?

Data-driven organizations need robust reporting and dashboards, including pre-built and customizable reports, scheduled reporting, and executive visibility.

User Experience

How does your solution help a user find the best references?

The primary promise of a reference management system is efficiency. Evaluate how the application helps users quickly identify best-match reference customers and content.

What search options are available to users?

Users should be able to filter, perform keyword searches, and combine both for practical, high-value results.

What type of product training do you provide?

Understand how the vendor delivers training to end users and administrators, and how much time is required.

How does your application support users in different geographies?

Multi-national organizations may require localization features. Confirm language support and associated costs.

How are system notifications handled?

Ask how notifications are delivered inside and outside platforms like Salesforce and whether they are customizable.

Technical Considerations

How often is your application updated or enhanced?

Ask about update frequency and recent feature improvements to ensure the solution evolves with customer needs.

How and where is your application hosted?

Understand the hosting environment and security certifications to ensure strong data protection.

When was your technology designed or architected?

Modern programs require flexible reporting, automation, and adaptable workflows. Architecture matters.

How does your solution leverage Salesforce data?

If Salesforce is your system of record, the solution should intelligently leverage its data.

What product integrations do you offer?

Integrations with complementary platforms can expand advocacy capabilities.

Does your application support both Lightning and Classic UIs?

Ensure compatibility with your Salesforce environment to maximize adoption.

Time & Money Considerations

Is everything we saw in the demo included in the pricing provided?

Confirm there are no hidden costs or unexpected upsells.

What resources are needed from us to implement and maintain the solution?

Clarify internal and external resource requirements for implementation and ongoing support.

What configuration options can't we do ourselves?

Determine whether vendor billable support is required for certain configurations.

What types of support are billable, during implementation and beyond?

Understand what services are included and what may incur additional fees.