BEYOND NPS[®] IDENTIFYING ADVOCATES AND INVITING THEM TO TAKE ACTION





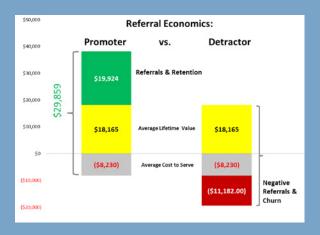
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INTRODUCTION

At any half-decent party or networking event, the guest list is arguably the single most important detail. Who's in attendance sets the vibe for the party and is therefore a major part of planning. So why should your B2B advocate marketing program be any different?



You've got a lot at stake at your company with a constant need to not only attract new customers, but retain your current ones and keep them happy in today's revolving subscription economy. Measuring your customers' happiness with NPS surveys is a great place to start, but unfortunately too many companies stop there. It's time to take an active role in inviting your Promoters to

help you increase leads, generate more revenue and reduce churn.

Take a look at this real company example above, which depicts the monthly revenue that can either be earned from activating positive word-of-mouth and retaining customers, or lost to rapid churn and negative referrals. Inviting the right advocates to the party is essential when you look at this staggering difference!

With the power of strategic advocate marketing, your B2B company can harness the power of positive results with engaged customers and change the minds of any nay-sayers by strengthening your relationships. So who should you invite to your advocate marketing party?

Think strategically about how those you invite will play into your overall goals. It won't be enough to hit "Send" to all your customers and hope for the best. Like any marketing, tailoring your communications and incentives for specific groups of customers will have the greatest impact.

With the help of our partners at Waypoint Group, we've compiled the best practices in identifying and inviting your advocates into an advocate marketing program. Use these tips as a guide and create the strongest army of advocates possible.

IDENTIFYING ADVOCATES

STEP OUT OF YOUR SILO

They say it takes a village to raise a child; well, it takes a small army to build an advocate marketing program.

While a member of the marketing team may be at the center of the program managing the day-to-day planning and execution of it, it's unlikely that this person actually "owns" any relationships with customers or even partners. They will need help from nearly every other department within the organization to identify and invite customers, partners and employees to join.

Focus your attention on folks who have a direct relationship with potential advocates, including customer success managers, sales reps, product managers and business development.

"We look at which customers are already doing things for us, and we also rely on our sales team to nominate customers via Salesforce."

- Rebecca Haugen, Marketing Associate, Okta

START AT THE TOP

To gain buy-in for your advocacy program across the organization, start from the top and work your way down. You'll be in a great position if your senior leadership has identified this as a priority in various departments. With their support, you can start spreading the word with their stamp of approval attached!

WHAT'S IN IT FOR THEM?

From there, tackle departments one at a time, focusing your discussions on how the program will benefit each person, department and the company as a whole. For example, when talking to the sales team, highlight how an advocate marketing program can:



Boost the volume of referral leads. With a systematized process for collecting and providing referrals, you'll be handing off more high-quality referral leads with built-in references.

Improve buyer education. Sales reps can connect promising prospects who are early in the buying process with advocates, speeding up the sales cycle with trustworthy references from reliable sources.



Speed up the reference process. Getting references to respond to your sales reps' requests can be like pulling teeth. Invite the right contacts who will be motivated to respond, cutting down the time your reps need to spend soliciting them to serve as references.



Build stronger relationships with customers. Advocate marketing maintains and strengthens relationships with existing customers when it's most convenient for them instead of when it's most convenient for your company's sales reps.



Alleviate the sales team from having to recognize advocates.

Your sales reps value referrals and references, but sourcing tokens of appreciation is a distraction from their selling time (and, let's face it, they don't always make the most creative or personalized choices). An advocate marketing program centralizes the recognition process so your reps can get back to what they do best.

"I think the most significant challenge for advocate marketing programs is keeping the pipeline of new prospective advocates filled. Find ways to motivate others in your organization to help you - the more people who are excited about advocacy and see its benefits, the better for your program."

- Ray Gans, former Community Manager, Actuate



ONCE YOUR COLLEAGUES UNDERSTAND THE BENEFITS OF THE PROGRAM, THEY'LL BE MORE LIKELY TO HELP YOU IDENTIFY AND INVITE ADVOCATES INTO IT.

Case Example: 800 account managers enjoyed these metrics after actively recruiting customers

ENHANCED CUSTOMER RELATIONSHIP

RESOLVED SUPPORT

MET NEW CONTACTS

OPPORTUNITIES IDENTIFIED **67**%

59%

70%

29%

COVERAGE

THE FULL MONTY COVERAGE

Once key customer-facing departments and individuals within your organization are on your side, you'll need to work closely with them to actively identify all potential advocates.

Don't just rely on your database, which may or may not be diligently managed. Get your colleagues involved both at the outset and on an ongoing basis due to:

- Shift in contacts
- New hires
- Additional contacts, such as End Users or Data Consumers, who may not have regular communication or contact with an account manager or sales rep but still use your product daily

"We look at our top-tier customer groups (the customer segment that we want more of) and find all of the people in the organization who have worked with Mobify. Look for people who are at least a little bit familiar with your company in their organization. It's important to deliver value, even to the people who might only talk about you once or twice a year, but who may play a part in how your company is perceived as a long-term strategic partner."

— David Fay, Content Marketing Strategist, Mobify

Once you've gathered and updated all of that information, how do you know who to invite to the party - and with what messaging? Construct an invitation strategy based on your business objectives. Ask yourself what you are trying to achieve at this moment in time and who can best help you achieve those goals:

INVITE DIFFERENT ROLES OF CUSTOMERS TO YOUR PROGRAM

- Within accounts: Decision makers, Influencers, End users
- Within company: By role (e.g., Marketing, Sales, Product) OR by seniority (e.g., Executives, Mid-Level and Entry-Level)

FOCUS ON A PARTICULAR TYPE OF USER

- Partner companies
- Prospects
- New customers
- Longer tenured customers
- Customers who use a certain product

Important to remember: If you start small with a limited segment of customers, keep expectations small, too. This should be a strategy to make incremental progress.

INVITE EVERYONE AND HOPE FOR THE BEST

Even though you want as many people as possible in your program, you shouldn't just blindly invite everyone in your email database. For each segment of potential advocates, take the opportunity to understand what motivates them and why the program would be valuable for them so you can customize the invitation and activities for them.

Real example: "We just did our first NPS survey and my buddy Bill just scored us a 4. He's been doing reference calls for us for months! What is he really saying to our prospects?"



"We cast a wide net when identifying advocates for our new program, the Mitel Champions. All Mitel employees and partners are invited, and soon we'll also be inviting select groups of customers, such as user group members, customer references, and those recommended by our partners and sales organization."

- Liz Pedro, Director of Customer Success Marketing, Mitel

If the "reach" of the advocates in your program is important to you, you may also want to consider conducting some social media research to understand who could have the most significant impact when they talk about your brand online:

- Number of contacts on LinkedIn, followers on Twitter, etc.
- Influential thought leadership posts in high-profile publications
- Mentions, retweets and other forms of engagement on social media
- Speaking gigs at industry conferences

Keep in mind, however, that while these higher-profile influencers can make a big splash with the odd tweet or name drop in a blog post, it's the genuine one-to-one interactions that potential customers value most.

"In my experience it is the end users that make better advocates. They can speak to the ins-and-outs of your product, are fiercely loyal, and are grateful for opportunities to build their professional network and brand"

- Rebecca Haugen, Marketing Associate, Okta

UNCOVERING ADVOCATES

RECRUIT NEW CUSTOMERS FROM THE GET-GO

New customers are often the happiest customers so invite them into your advocate program in the honeymoon phase: during the onboarding process. For example, when signing on a new customer. For example, when onboarding a new customer, highlight your advocacy program in the welcome email.

In fact, you can use your advocate marketing software as your onboarding hub to help automate the entire process. Tap into this opportunity to help new customers become more familiar with your company, product, processes and more and set the stage for long-term satisfaction and advocacy.

> ONBOARDING WITH YOUR ADVOCACY MARKETING SOFTWARE HELPS YOU LEVERAGE THE EXCITEMENT NEW CUSTOMERS FEEL TO PUSH THEM THROUGH THE ONBOARDING PROCESS – AND BEYOND.

EXISTING CUSTOMERS

Make sure you don't focus solely on your newer customers when it comes to advocacy. Long-time, happy customers may just be even more valuable advocates than your newest customers – after all, their longevity speaks volumes.

To recruit these customers, task your account managers with outreach activities. Prime candidates for your advocacy program are the customers that have:

- Participated in a case study or other related activities such as reference calls
- Co-presented during a webinar
- Given you a referral
- Raved about your company on a social channel
- Expressed satisfaction during an event
- Offered a testimonial

Listening to social media channels -- including social networks, user communities and review sites -- are a great way to identify people who are already fans of your product and brand.



Kara Haas @greenposgirl · Aug 12 Talked to @Billcom...have contemplated implementing for quite some time. After today, I'm glad I did not wait any longer. #supersupport

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6:42 am - 13 Aug 2014



Kara Haas @greenposgirl · Aug 13 @billcom My pleasure. Thanks for the link. I'm an insider now. :)

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GET REFERRALS

Don't miss out on potential advocates just because they're not in your CRM or in direct contact with someone at your company. Especially when your end users are not the decision-makers who chose to invest in your solution in the first place, referrals for additional advocates within the account will play an important role in bringing all your potential advocates to the surface. Encourage your customers to bring you deeper into their accounts by referring colleagues who are also using your solution.

> "Take a look at the folks talking to and engaging with you on social media channels, sharing about your product as expert users in communities, and those already endorsing you on thirdparty review sites. These folks are willingly engaging with and acting as references for your brand with no expectations of acknowledgment or reward - exactly the type of customers who will make some of your greatest advocates."

- Liz Richardson, Social Media and Advocate Marketing Manager, Bomgar

"Human to human contact is the absolutely most important thing."

— Kevin Lau, Online Marketing Manager, Quorum

SELL CUSTOMERS ON YOUR PROGRAM

You'll need to sell many first-time advocates on reasons to join your program. To get these customers engaged, educate them on your program's value. Make sure you outline why these customers have been selected to join your program. If they have already advocated for your company in some way, highlight these activities and thank them for the contribution to your company's success. Underscore that this program has been designed to give them the recognition they deserve for their efforts (after all, who doesn't like to be in the spotlight once in a while?).

Remember to think of the program from your customers' perspective – explain what's in it for them. Examples of how advocates can benefit by participating could include:

- Increasing their personal social media presence
- Becoming a thought leader in their area of expertise
- Showcasing them as a valued member of your exclusive group
- Gaining status among peers
- Receiving exclusive recognition from your company

Approach this process as a personalized selling effort and tap into all the resources at your disposal to make a winning pitch. These customers may be most open to hearing from their sales rep or account manager with whom they have an existing relationship. So enlist these colleagues to convey the program details and what's in it for the advocate. And since sales reps can get testy about letting others interact with "their" customers, assure them that their customers will be taken care of and recognized for their efforts.

SEND AN INVITATION THEY CAN'T REFUSE

Even if your sales reps or account managers are the ones reaching out to potential advocates, make it easy by creating a formal and consistent invitation for their use. And don't underestimate the importance of this invitation. Is the tone exciting and engaging? Does it explain why the advocate has been selected to join? Does the program sound exclusive? Remember, you want to convey that this is an important, highly visible program in your organization.

Whether sending an invitation by email or direct mail, make sure to include these elements at a minimum:

- Explain what's in it for the advocate
- Feature a bold call to action above the fold and repeat it at the bottom
- Sign the invitation from someone within your company who has a strong relationship with the customer
- Include contact information so the customer can ask questions

"We have a team of directors that works closely with implementation teams to identify satisfied customers who would like to participate in the program, or who have expressed that they would like to be a reference. One of our XOXO directors reaches out via phone or email with an invitation, and offers a brief tutorial on how to use the program and take advantage of all that it offers. Sending an invitation via email and following up with short call for an introduction has been the most well-received method for us."

— Kimberly Griffith, XOXO Customer Success Administrator, Ceridian

BEST PRACTICES:

- Use easy-to-understand language to describe your program and how it works
- Send a follow-up email within 7 days of sending the initial invitation
- Experiment with the imagery and copy in your emails and direct mail to see what yields better results
- Consider including video welcome messages from the CEO or another highly recognizable person in your company

	Invitation to join Ceridian XOXO 📄 intex x	
	Carlos Gonzalez via email.Influitive.com 10:40 PM (29 minutes ago) 🖄 🏠 🔽	
	Dear Chod, Congratulations, you are invited to join the Ceridian XOXO Customer Success Program!	
	The "Click To Join XOXO" link below will take you to the Ceridian XOXO online portal. This is an online portal where you can set your preferences to receive, and review, Ceridian Customer Success Program opportunities. You can opt to participate in, or decline, activities according to your objectives.	
	expertise and receive recognition for your organization's successes. You will also have a chance to build your professional network of contacts with introductions to counterparts in your industry. Completed activities are rewarded with Certification XXXX points that can be redeemed for your organization's benefit!	
•	Have fun with this program and never hesitate to contact ust Click To Join XOXO!	
1	VOVO	
	Linfluitive Admin ≤admin@influitive.com> 10:44 PM (14 minutes ago) ☆ ★ ▼ to me ⊙	
	act-on	
	JOIN OUR EXCLUSIVE CLUB FOR ACT-ON CUSTOMERS Chad, we are looking to help make you a better marketer!	
	You've been identified as a customer that should be invited to Act-On's VIP program. We call it ALUV, and it offers exclusive benefits and networking opportunities while having fun.	
	Here's the way ALUV works - we'll give you the opportunity to connect with other advocates and expert usors, expand your company's brand in the marketing community, and you'll have a chance to participate in fun challenges to earn badges and points that can be redeemed for gifts, all while gaining you recognition among other Act-On users.	
	Accept our invitation, and lot's make 2013 a record setting year. Accept invite to ALUV!	

MAKE IT EASY TO SIGN UP

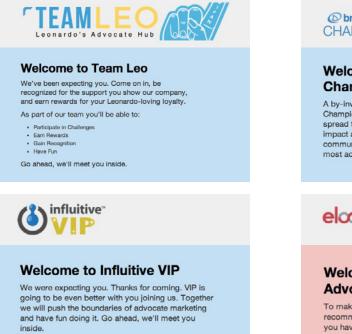
Customers shouldn't need an advanced degree to sign up for your advocate marketing program. The invitation should point to a landing page where customers can easily register as an advocate. And when they visit the page, your customers should feel they've landed somewhere special.

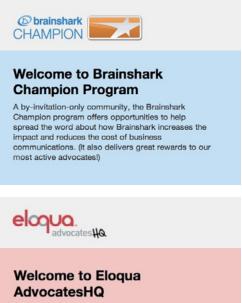
With that in mind, follow these best practices:

- Extend a warm welcome to your program
- Keep your landing page message consistent with your invitation
- Convey the program value in 3 bullet points
- Include a testimonial from an existing advocate
- Keep the copy short and to the point

We look at customers who are active in other social areas, like our communities, or those who attended webinars. We email them with a special join code."

— Kim Ellis, Manager, Customer Experiencer, BMC Software





To make your life easier (one less password!) we recommend using the LinkedIn option for sign in! [If you have any trouble, email heather. or use the Support button on the right side.]

ABP: ALWAYS BE PROMOTING YOUR PROGRAM

Just because you've identified certain customers to recruit into your program doesn't mean there aren't many other eager fans waiting in the wings.

In addition to sending individual invitations, be sure to promote your advocacy program in other ways:

- Featuring it on your website and profile pages on your social networks
- Including a link to it in your sales reps' email signatures (include a "join" code)
- Highlighting interesting content that advocates generate via Twitter
- Encourage advocates to shout from the rooftops about their participation in the program



"SMART's customers often hear about our program through word-of-mouth from other customers and complete a global application we have posted on our website."

— Deena Zenyk, Advocate Marketing Manager, SMART Technologies

WHAT TO DO WHEN PEOPLE DON'T JOIN

WHY SHOULD I CARE?

Lack of engagement can be telling of account health. For relationship analysis, Waypoint Group has seen silent accounts churn up to 7x faster than unhappy accounts!

HOW CAN WE SOLVE THIS PROBLEM?

- Ping potential advocates again while avoiding an annoying level of contact
- Sell your program better with explicit rewards, even if it is shaping product development and not monetary
- Try a different challenge that would appeal to different types of users: charitable donations or a current pop culture event tie-in



IF YOU HAVE NPS-LIKE DATA FROM RELATIONSHIP SURVEYS:

Know Bob is a Detractor? Follow up on how he can be more successful with your company first. Focus on customer success and convert a disgruntled customer into an advocate—and then send another invite.

Know Susan is a Promoter, but she hasn't joined? Call or email her to explain the benefits of the program.



"One of the challenges we've faced is that customers stop halfway while signing up to join the program - they just don't complete the process. To overcome this, we have the registration page open and ready to go at trade shows so they can fill in the three fields on the spot."

- Stephanie Burns, Marketing Program Manager, Junction Solutions



"My recommendation: work with sales to identify opportunity hotspots. Go into those geographies to do on-site recruitment roadshows. We've done this in a few locations and it works like a charm, allowing us to build a solid advocate community in a specific place."

- Deena Zenyk, Advocate Marketing Manager, SMART Technologies

ACTIVATING NEW ADVOCATES

DON'T INVITE YOUR GUESTS OF HONOR TO AN EMPTY ROOM

It's not enough to invite your advocates to the party – you need to get them motivated to participate, or work the room, so to speak. It's your party so take charge and lead the way! The quickest way to end a party – or kill a program – is by leaving participants with nothing to do. Avoid the following three mistakes and your program will be rocking non-stop.

TOO FEW ACTIVITIES

Your advocates may be eager to speak about your company and its products, but they may not know all the ways they can go about it. This is your program so step up and give your customers concrete ideas for how they can advocate on your behalf.

Best practice: Provide your advocates with access to at least 10 activities at any given time which can include:

- Responding to a comment left about your company in a discussion forum
- Participating in a case study
- Speaking at your user conference
- Referring a potential customer
- Sharing a soundbite to be used in your marketing materials
- Mentioning your company on Twitter or LinkedIn
- Hearing your CEO speak at an upcoming event
- Tuning in to your latest webinar
- Reading your latest case study
- Writing a product review

SHARING IRRELEVANT ASKS

While your advocates might share a passion for your company and its products, that doesn't mean you should treat all advocates the same. Just as you segment your prospects to send them the most meaningful, relevant information about your company and its offerings, you should do the same with your advocates.

For one, don't bore your advocates with activities they've already seen. You can also segment by advocacy level, geography, product used and whatever else makes sense in light of how you create and present advocacy opportunities.

REMEMBER – ADVOCATES ARE NOT BORN; YOU NEED TO DEVELOP THEM OVER TIME.

BEING TOO SELF-SERVING

It's true that advocates are doing a lot for you. But your program should never be a one-way street. Your advocates may need motivation to participate. And you certainly don't want them to feel it's a drag or boring to advocate on your behalf.

With that in mind, make sure you keep things interesting by mixing your asks with education and fun!

Asks – as the name implies – are when you ask advocates to do something for you. This could be anything from serving as a reference to writing a product review on a thirdparty site. But you don't want to burn your advocates out so present your ask as something that will also benefit the advocate.

Keeping with the "education" theme, present your advocates with activities that make them more knowledgeable about your product. It benefits your customers by arming them with additional skills and expertise they can use to extract more value from your product – and impress their colleagues and boss!

Lastly, let's not forget that people like to have fun at a party! And let's face it – everyone is more motivated to take on enjoyable tasks. In fact, get your advocates thinking of your asks as fun ones, and they'll be more than happy to take part in the next one! Let's say you ask your advocates to snap a photo wearing your company t-shirt while they're on vacation and post it to Twitter. They'll likely be more than happy to do this and as they're checking out all the fun activities you're suggesting, they'll probably end up taking part in the ones that deliver real value to your company.

CHANGING THE MINDS OF PASSIVES

According to the Economics of Loyalty, on average, 83% of satisfied customers are willing to refer services to friends, colleagues and industry peers, but only 29% actually do so. The reality is that your delighted customers will advocate for you naturally to some extent, such as by sending referrals your way. But if you really want to mobilize your advocates, you need to take steps to make it happen.

Educate and engage: Sometimes all it takes to activate passive customers is a bit of outreach. Start by communicating the real value of your advocacy program to 'on-the-fence' customers, including the benefits to them.

Encourage participation: You can do so by inviting them to join an online training session or user group. The more they participate, the more points they will collect. Plus, they'll be learning more about your product in the process, empowering them to extract more value from it. That will make them an even happier customer and more likely to renew or be open to making an additional purchase.

Ask for feedback: You can also draw these customers in by soliciting their feedback on your product or participation in a beta test. Giving them a say in the development of your product can pave the way for them to speak favorably about it.

Implement a buddy system: With their permission, pair one of your happiest, most successful advocates with someone who's struggling or frustrated. They'll both appreciate the opportunity to network with and learn from other users, plus your advocate's enthusiasm and expertise will likely have a positive effect on the other customer. Interestingly, these tactics work equally well with your satisfied and dissatisfied customers. By inviting frustrated customers to learn more about your product, share their feedback and interact with others in your advocacy community, you can convert them from detractors to promoters.

"Sometimes it can be difficult to gauge what kind of experience the customer had during implementation without having a personal conversation. If they were unhappy with their experience, we offer help to get their issues resolved. Those customers sometimes end up being our best advocates because they truly experience the value of the program."

- Kimberly Griffith, XOXO Customer Success Administrator, Ceridian

INCENTIVES

UNDERSTAND WHAT MOTIVATES YOUR ADVOCATES

You need to understand what your advocates value so you can light a fire under them. By studying what makes each of them tick, you can motivate them to act on your behalf. Does your advocate appreciate the personal touch? If so, send a token gift on their birthday. If the advocate likes wider recognition, invite them to participate in a beta test or to contribute to your product roadmap. Perhaps your advocate is more concerned with bigger world. In that case, your company could make a charitable gift in that person's name.

Tap into Gabe Zichermann's framework based on four powerful motivators – Status, Access, Power and Stuff (SAPS).

Status. Help those who are motivated by status get wide recognition as authorities in their area of expertise.

Access. When customers want VIP treatment, go the extra mile and give these customers unique and exclusive experiences.

Power. For those who crave power, offer opportunities to influence other advocates or the direction of your solution.

Stuff. Some of your advocates – particularly new ones – will be motivated by free stuff or opportunities to earn something so give them tangible rewards.

To make sure you are delivering the right incentives and motivations, create a "personality test" challenge and ask advocates the kind of activities and rewards they prefer, whether certain foods, drinks or brands.

You may want to base your test on a well-known framework, such as Abraham Maslow's Theory of Needs, which explores human motivation. Formulate your test to understand which need each advocate is most interesting in fulfilling:



Safety and stability.

Is your customer most interested in building bonds that grant a sense of security and stability? A powerful network and reputation for exceptional knowledge and skill can put this advocate in good stead.

Belonging and identity.

Perhaps your customer wants to feel a sense of belonging and identity with a larger purpose or group. Membership in your advocacy program answers that need.

Self-esteem.

Maybe your customer needs an esteem boost. Advocacy can deliver that time and again by offering a venue for your customers to share their expertise and be recognized for it.

Self-actualization.

The desire to fulfill one's talents and potential is something we can all relate to, but apparently only 1% of humans ever truly arrive at that goal. That said, we should all continue striving to reach that goal, and being an advocate is one path for getting there.

KEEP THEM MOTIVATED

Anyone who has started an exercise program, a home renovation or other long-term project understands how challenging it can be to stay motivated from beginning to end. The same is true of your advocates – you need to sustain their motivation as long as they're your customer. But you don't want to burn them out and see them walk away from your program. Here are three rules for communicating about advocacy campaigns to keep your advocates motivated without overwhelming them:

Send consistent updates about new, low-value campaigns as they are launched, such as via a weekly program digest or newsletter that summarizes this activity via email. These campaigns require little on your advocates' part, keeping them active and engaged in the program on a regular basis, while reducing churn.

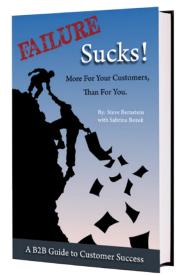
Send real-time email alerts or other notifications for campaigns that are only relevant to a small group of advocates or which allow only a limited number of participants.

To engage select advocates in urgent, specialized or challenging campaigns, **send a personal email or pick up the phone**. Such outreach will make your advocates feel that you respect their time and give them the opportunity to understand exactly what you're looking for.

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A recipient of the 2013 CXPA Vendor Excellence Award, Waypoint Group has pioneered the B2B customer experience industry through tested and strategic methodologies that build loyalty and add value for companies large and small. Whether it's by increasing customer retention or accelerating new business from positive word-of-mouth, Waypoint links insights to financials to generate significant ROI for clients. We partner with leadership to effectively amplify and act on customer insights that fuel stronger relationships to accelerate profitable growth.



And we just wrote the book on how to implement Customer Success at your B2B company: Failure Sucks! (More For Your Customers, Than for You.) Learn to build your program from scratch and scale the right way or hone your current processes with templates, case examples, and sample reports that allow readers to put the content to use immediately.

Visit waypointgroup.org for more information.



HOW ARE YOUR CUSTOMERS HELPING YOU FUEL YOUR COMPANY'S GROWTH?

Many of the advocate marketing programs featured in this eBook are powered by Influitive's AdvocateHub, a complete advocate management platform that helps B2B marketers capture customer enthusiasm, and use it to turbocharge marketing and sales efforts.

With AdvocateHub, B2B marketers build advocate communities where customers, fans and evangelists can complete high-impact activities, such as referrals, reference calls, product reviews or social sharing.

Visit influitive.com to learn more.

