Category

Commercial Excellence

Customer Advocacy, References & Case Study Engine Playbook

Building a reference and case study pipeline systematically, not scrambling for one every time sales asks

- Practitioner
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- Administrator
- 16 April 2022
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Overview

A framework for building a customer advocacy, references, and case study engine — systematic identification and cultivation of advocate customers ahead of need, avoiding the common pattern of reactive, last-minute scrambling for references or case studies whenever a specific sales opportunity requires one.

Why do many organizations struggle to provide references or case

studies quickly when sales needs them? Without a systematic, proactive advocacy program, reference and case study availability depends on reactive, ad hoc identification of willing customers each time a need arises — a process that's slow and unreliable compared to

having a cultivated pipeline of ready advocates.

What does a systematic customer advocacy engine actually involve,

beyond just asking happy customers for references occasionally? Proactive identification of potential advocates based on genuine success indicators, deliberate relationship cultivation, and organized tracking of advocate availability and specific use cases — building a genuine pipeline, not ad hoc individual requests.

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