Customer Advocacy Program basics

Exists	Need	N/A	Service/process	Description	Notes
			Recruitment Process Workflow	Workflow of interactions to identify and onboard potential advocates into the program.	
			Recruitment: Contactability of End Customers	Define whether the Customer Advocacy Managers are going to contact the Advocates directly or if all the advocates' touchpoints are happening through others (like CSMs, Account Executives, channel managers, etc).	
			Nomination Process	Create a nomination process, define easy access tools, and submit information about the nominated advocate.	
			Integration with Other Customer Programs	Interaction with other programs (loyalty programs, evidence programs, the voice of the customer, etc). You might need to inform, route, or nominate customers being recruited to different areas of the organization.	
			Welcome Kit	Create a welcome kit with information for advocates that includes the program gives & gets, value proposition, engagement opportunities, and how to expand or pause their program enrollment.	
			Interview Questionnaire	Develop questionnaires to run customer interviews customized by product and industry if necessary.	
			Recruitment Vetting Rules	Define rules and workflow to validate candidates against vetting criteria. Identifying signals like product usage and customer satisfaction should be part of this process.	
			Recruitment SLAs and KPIs	SLAs for processing nominations, onboarding customers, scheduling interviews, and communications with sellers, marketers, and advocates.	
			Recruitment Dashboards	Define a way to measure the recruitment activities, SLAs, and how they will feed the Customer Advocacy Dashboards.	
			Customer Profile Quality and GDPR	Define quality standards when profiling customers. Also, define restrictions on what can be added to the database to comply with GDPR and other applicable regulations.	
			Fulfillment Process Workflow	Workflow of interactions to engage with advocates, including creating Customer Advocacy Success Plans and their execution, and how to process Advocacy Requests from sellers and marketers. Definition of which roles inside your organization are going to be accountable, informed, or support advocacy activities such as the creation and execution of the Customer Advocacy Success Plans, proactive support, and advocacy request processing. The accountable role is the one playing the Customer Advocacy Manager role.	
			Proactive Fulfillment	Define process and priorities to run proactive support - when the advocacy managers are scanning the sales pipeline and events calendars to offer advocates proactively.	
			Contactability of End Customers	Define whether the Customer Advocacy Managers are going to contact the Advocates directly or if all the advocate's touchpoints are happening through others (like CSMs, Account Executives, channel managers, etc).	
			Requests Vetting Rules	Define rules and workflow to validate advocates against vetting criteria and Advocacy Requests requirements. Identifying signals like product usage and customer satisfaction should be part of this process.	
			Requests SLAs	SLAs for picking up and processing Advocacy Requests, the maximum number of advocates offered to support sales and marketing activities, execution of the Customer Advocacy Success Plans, the maximum number of days to finish an Advocacy Request, communications with sellers, marketers, and advocates, etc.	
			Fulfillment Dashboards	Define a way to measure the fulfillment activities, SLAs, and how they will feed the Customer Advocacy Dashboards.	
			Escalation Processes	When recruiting customers and processing advocacy requests a common challenge is to have unresponsive advocates, sellers, and marketers. An escalation process defined and approved is needed to unlock all the engagements of the program and accelerate the time to respond and support sales and marketers.	
			Advocate Usage Protection	Define rules and limits to the usage of advocates based on their preferences. Include this check during the validation process when fulfilling advocacy requests. Also define when NDAs are needed before meetings about specific topics such as cybersecurity, regulations, etc, in this case, create a process where the Advocacy Manager can manage the NDAs.	
			Program Enrollment Maintenance	Program Enrollment Maintenance - Definition of processes to: • Extend/reduce advocate's participation - how to capture a new set of activities that an advocate is available to participate in. If it's a Managed Advocate, it should trigger changes in the Customer Advocacy Success Plan to balance the new activities with recognition activities and be submitted for the advocate's approval. • Getting Advocate's approvals - process to sign NDAs and PR Agreements when public-facing activities are involved (events, stories, etc.), approve Customer Advocacy Success Plans, logo, and other trademarks, customer story production and going live, etc. There should be a clear process so advocates can limit communications or program participation, preferably through a self-service engine. • Pausing and quitting the program - processing the signals (decreasing satisfaction, lower product usage, etc) or direct desire of advocates to pause their participation or quit the program.	
			Communications Touchpoint Journey	Map all touchpoints from the defined processes and create an integrated journey for advocates and internal program users. Estimate the time to value for people interacting with the program, how long each process group takes to finish (recruitment, interview, advocacy request processing, etc), what are the waiting times, and identification of weak/critical points.	
			Email Boilerplates & Templates	Define and create email templates and boilerplates to be used every time you need to interact with program stakeholders, companies, advocates, sellers, and marketers. You need emails for every process defined during the Process Design step. E.g., Emails for escalations, recruiting advocates, communicating expiring SLAs, communicating every step of the advocacy requests process, when putting advocates on hold, etc.	
			Program Value Proposition	After defining all the advocacy & recognition activities, integrated advocacy practices, and services your program will deliver to internal users and advocates; now it's time to articulate your program gives & gets in a clear value proposition deck. If your program is serving as the entrance door for other programs in the loyalty and voice of the customer space, here is when you integrate their value into your advocacy program value proposition.	
			Walking Deck & Program Brochure	Internal and External shareable assets introducing the benefits of the program for advocates, partners/channels, sellers, marketers, Analyst Relations, Customer Experience, etc. Sellers and advocacy managers will need supporting materials when approaching customers.	
			Program Branding	Define the Program name, tone of voice, logo, and everything related to the unique identity of the program. Your best customers will be interacting with your program. A strong identity will give them superior usability, making it quicker to recognize your program correspondence, driving trust and higher response and email opening rates.	
			Internal Program Portal	Your program needs a portal serving as the one-stop shop for everything customer advocacy at your company, available internally for all current and future users. It should contain SLAs, walking decks, useful links, self-service advocates database explorer and similar tools, rankings of internal facilitators and advocates, customer intelligence insights being produced by the program for sellers and marketers, a list of managed advocates, links to program dashboards, advocacy concierge, etc.	
			Newsletters for Program Users	Define content, reach (countries, segments), audience (VPs, GMs, managers, etc), and frequency. We propose a newsletter communicating to sellers, marketers, and customer experience professionals. Recognize the most engaged facilitators supporting the program (account teams or CSMs owning the relationship with the advocates), highlight new advocates onboarded and stories published, deals closed where advocates were involved, influenced pipeline, and relevant program results. You can also include a program roadmap with the new services and capabilities added and what is coming up next.	
			Monthly, Quarterly and Annual Results Communications	Share information with the program sponsors and key interested parties, like marketing and sales VPs, about how your program is interacting and supporting their teams. It's also a good channel to lock or remind agreements with their departments and get the visibility your program needs to grow and evolve.	
			Pitch Guide	Create documents to educate program users on how to articulate the program's value proposition. It should serve as a guide supporting two necessary conversations: 1) between advocacy managers and internal account teams to get their sponsorship. 2) between advocacy managers or sellers and the actual advocates to support recruitment activities. An FAQ should be included to address the most popular objections coming from each group. A walking deck should also be produced to support the conversations.	
			Customer Advocacy Program Council	Create a group with interested parties to run the program from a strategic and decision-making perspective. This group should be diverse in its role composition and get together to assess overall program performance and strategic business goals attainment. Create a RACI table (responsible, accountable, consulted, informed) to support and approve decisions.	