

THE SHIRMAN GROUP

Extend the reach of your business

Cultivating Customer References

Leveraging past success for future sales

A Shirman Group Client Brief

Customer success stories are regularly cited as the most valuable sales tool. Yet many companies find themselves scrambling to come up with the right reference when the need arises. By putting a repeatable process in place to cultivate customer advocacy, vendors can create a continuous stream of success stories and other reference materials.

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Nothing convinces a customer of a vendor's credibility like other customers. To make the most of your existing customers' successes, be sure to make reference creation an ongoing process rather than a fire fight.

The following approach ensures a continuous flow of success stories and referenceable customers.

1. Prep work:

- Define which audience(s) the success stories will be written for. (You may decide you need both a technical case study, and a business success story, for example.)
- Define where in the sales cycle and how the success stories will be used. This will help identify what type of information should be gathered, and what materials to produce for sales and marketing use.
- Create a list of "big aha's" that you want the audience to take away from the success stories.
- Create interview guide(s) that cover all the relevant topics for each audience.

2. Information gathering:

- If just starting out, review all existing accounts with appropriate sales reps (or from existing internal write-ups if the reps are not available) to understand current state of each account and identify key contacts. Agree with rep on the timing and process for reaching out to the customer.
- Establish an on-going process for follow-up with customers. We recommend contacting customers at deal closure, at deployment, and 6 to 12 months after deployment. This enables you and the customer to establish a benchmark against which to measure quantitative improvements.
- Contact customers and conduct interviews. In the process, explore what form of reference the customer is willing and able to provide. Be sure to use these contacts to better understand customer expectations, how products are being used, and what additional ways your company can create value.
- For each interview, create a detailed write-up of the conversation. This is not the success story, but rather a complete record that will communicate what you learned to others in the organization. Be sure to provide a copy to the account manager, who may find new information or even opportunities based on your discussion.

3. Use success stories for sales and marketing

- Create success story materials for various stages in the sales cycle, based on customers' usage permissions. (These might include customer success briefs, technical case studies, lists of quotes, website content, PowerPoint slides, etc.)
- Create an internal reference resource that enables all sales and marketing folks to easily find relevant success stories.
- Create a central hub to manage when specific companies and people are being approached as a live reference for another client. This gives sales and marketing a single place to go when they need a customer advocate, and protects advocates from being approached too often or for inappropriate requests.
- Work with PR to publicly promote appropriate success stories

4. Repeat

Establish an on-going program that generates a reference pipeline. A few keys to success with such a program are

- Create one central owner for customer references. A best practice is to make this part of a customer advocacy organization that own the reference program, Customer Advisory Board, customer briefing center, and customer satisfaction surveys.
- Periodically review the “prep work” above to make sure its up to date.
- Reward customer advocates with things that are valuable to them professionally and/or personally.

About The Shirman Group

The Shirman Group helps technology companies identify and pursue new revenue streams by mattering more to customers and partners. Companies that are looking to expand into new industries, create relevance for new and existing audiences, and make their value to customers more tangible, turn to us for creative ideas and substantive results. Shirman Group clients include industry leaders like Symantec, BEA Systems (Oracle), Intervice/Convergy, and CA, as well as select new technology ventures. More information about The Shirman Group and our clients is available on-line at www.shirmangroup.com