

Advocate Marketing Creates B2B Customer Relationships That Last A Lifetime

Focus On People, Not Companies, To Increase Advocate Engagement

by Laura Ramos
September 28, 2015

Why Read This Report

Word of mouth and peer testimony are powerful business-to-business (B2B) marketing tools, with social, mobile, and the steady move to subscription-based business models making advocacy all the more important. Read this report to learn how B2B marketing professionals are developing strategies and programs to engage buyers in shaping opinion and sentiment about offerings. And learn how advocate marketing builds longstanding relationships that persist even when individuals move from one career opportunity to the next.

Key Takeaways

Customer Testimony Helps B2B Attract Business And Close Deals

Referrals deliver higher-quality leads, references help sales close deals, and B2B buyers prefer to engage with peers. Now more than ever, it's time to beef up how you cultivate and deliver customer testimony in the digital world.

Advocate Marketing Extends The Reach And Depth Of This Goodwill

Social media, online activity, and the mobile mindset create new opportunities to energize advocates so they can spread your message as they praise your products and capabilities.

Mutually Beneficial Programs Deliver The Most Value -- And Success

Designing programs around serving the interests and aspirations of specific advocate types -- in service to your business goals -- is the best way to make advocate marketing pay off.

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with [Peter O'Neill](#), [Emily Collins](#), Matthew Camuso, and Matthew Izzi
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Forrester interviewed 26 vendor and user companies, including Blackbaud, Ceridian, Citrix, Dynamic Signal, Influitive, Intuit, Signature Worldwide, and SocialChorus.

Related Research Documents

[B2B Loyalty, The B2C Way](#)

[Tip The Balance From Reference Customers To Advocates](#)

[Winning In The Age Of The Customer](#)

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The Digital Age Raises The Importance Of Customer Goodwill

Customer stories and testimony are among the most powerful tools at the disposal of B2B marketers. From recognizable company logos to in-depth case studies, customer substantiation provides crucial evidence that B2B companies do what they say and deliver on their brand promises, regardless of what sales and marketing claim. To draw upon reserves of customer goodwill, you need to shift your marketing effort from currying favor to nurturing advocates — and alter your strategy from an exclusive focus on companies to include the individuals behind the customer success stories. We call this process of creating advocates — people who have a personal story or expert perspective to share about your firm — and helping them spread the word about you “advocate marketing,” which we define as:

The use of marketing strategy, budget, and resources to encourage customers, employees, or partners to do something on behalf of your company with or without the expectation of mutual benefit.

In this digital age, where information accessibility and service-oriented business models favor buyers, it is essential to market to and through your advocates, and not simply generate one-off testimonials, because:

- › **Social opens up a new world of advocacy opportunities.** If customer references and referrals have always been important in B2B marketing, why is advocacy more important today? Most B2B marketers and technology suppliers involved in advocate marketing point to social sharing as the primary driver (see Figure 1). Howard Tarnoff, senior vice president (SVP) of customer success at Ceridian, a human capital management software provider, explains: “Social proof can’t come from the company, it must come from customers.”

“The rise of social communities and media amplifies the voice of everyone. People don’t choose without a customer review; social harnesses this dialog and makes it useful in digital ways.” (Jim Williams, vice president of marketing, Influitive)

- › **A subscription-centered economy makes retention essential.** Buyers have more choices than ever, and they want to know that their choice is paying off long after the ink dries on the contract. B2B firms must continue to demonstrate value to customers to retain their business, and keeping the relationship fresh and top of mind is a key way to do that. These fundamental changes in the nature of business buying make advocate marketing not simply a way to harvest buyer goodwill, but also a fundamental ingredient to creating lasting relationships.

“We have been a provider of nonprofit fundraising solutions for 30 years. As we move some of our solutions to the cloud and the new subscription model links our success even more closely with our customers, it’s even more important to keep customers engaged in the long run. Advocate marketing, along with stronger customer success programs, ensures we can do that.” (Amy Bills, customer marketing for general markets, Blackbaud)

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› **Operationalizing advocate marketing scales outcomes.** Reference and referral programs misfire when marketing sees them simply as sales support. To cure this, B2B marketers are investing in advocacy to expand these programs and encompass other aspects of the customer relationship (see Figure 2). “Bringing process and structure to advocacy programs changes behavior and mindset from account ownership to corporate asset. When this happens, companies and their customers get more value out of it,” says David Sroka, CEO of Point of Reference, a leading reference management service provider.

“Advocate marketing not only scales your voice in the market — we have 1,400 advocates tweeting 400 to 500 times a week — but delivers topline value. During one three-week challenge, we generated more than 800 reviews from customers and partners.” (Liz Pedro, customer programs, Mitel)

FIGURE 1 The Age Of The Customer Heightens The Importance Of Advocacy

“Why is advocacy more important in B2B marketing today?”



Base: 26 B2B marketing professionals or technology providers (multiple, open-ended responses accepted; top 10 shown)

Source: Forrester qualitative research conducted in July/August 2015

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FIGURE 2 Advocacy Investment Starts With The Desire To Scale Existing Programs

“Why do B2B marketers choose to invest in advocacy programs?”



Base: 26 B2B marketing professionals or technology providers
 (multiple, open-ended responses accepted; top 10 shown)

Source: Forrester qualitative research conducted in July/August 2015

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B2B Marketers Must Showcase Customer Success And Goodwill Better

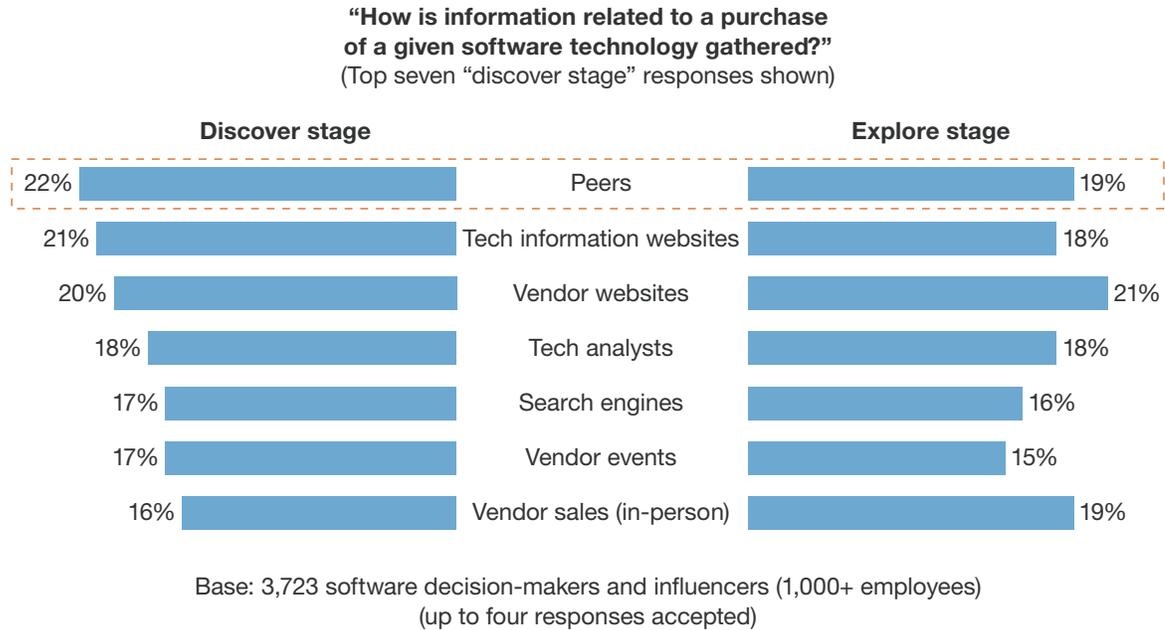
Despite their widely demonstrated value, references and referrals are rarely cultivated as a marketing asset in the same manner as leads or press mentions. Most marketers run these programs ad hoc, with minimal resources, and many end up disappointing the salespeople and customers these programs intend to help.¹ To generate prized customer testimonials, stop trying to harvest customer generosity and start cultivating interactions that buyers find valuable while also rewarding them for providing this essential service. Tapping into customer goodwill has long given B2B marketers an advantage because:

- › **Referrals deliver ready leads in a competitive market.** Just as the Net Promoter Score has become the gold standard for measuring recommendation strength, referred business sits at the pinnacle of sought-after leads.² Referrals are also more likely to remain loyal customers over time. In this age of digitally empowered buyers, having an existing customer or proponent of your company refer a potential buyer is the surest way to rise above the noise. Debbie Bain, director of customer marketing at Fleetmatics, a global positioning system (GPS) fleet tracking provider, told us: “Referrals are happier, stickier customers. They correlate positively with satisfaction and retention.”
- › **References help sales accelerate deal conversion.** Business buyers prefer to learn about potential solutions online.³ When they visit your website or engage with sales for the first time, they want specific details about who has been successful using what you offer, how they did it, and what happened as a result. Top B2B marketers who operationalize reference programs to deliver this information show improved win/loss rates and shorter sales cycles when comparing deals that use references with ones that don’t. These results get executive attention. Jim Mooney, CEO of reference management platform provider RO Innovation, said, “When we ask C-level executives about the qualities shared by their top five customers, we now hear customer influence along with name recognition or size of deal in their responses.”
- › **Like consumers, business buyers trust word of mouth the most.** Online adults are five times more likely to trust a brand or product recommendation from friends or family than from an online ad, and they are twice as likely to trust them over information found on a firm’s website.⁴ B2B buyers are consumers outside of work hours, and this pattern carries over to how they learn about and investigate business-related purchases. Software purchasers in North America, for example, name “peers” as the top response when asked which information vehicles most influence their decision-making in the discover stage of buying (see Figure 3).

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FIGURE 3 Business Buyers Rely On Peers To Inform Early Purchase Decisions



Source: Forrester’s Business Technographics® Global Priorities And Journey Survey, 2015

Advocate Marketing Turns Goodwill Into Valuable Engagement

The most successful companies today focus strategy and budget on the technologies, systems, and processes that win, serve, and retain customers across their lifetime.⁵ If the customer journey is now a cycle, then advocacy is the drive chain that keeps the flywheel of the customer relationship spinning (see Figure 4). B2B marketers who build up advocate marketing momentum enjoy:

- › **A direct link between advocacy and revenue.** Most B2B marketers told us they can tie revenue results directly to advocate participation. Among those we interviewed, 10 out of 26 said they saw higher conversion rates, more qualified leads, and greater sales efficiency when they involved advocates (see Figure 5). Lee Rubin, who manages reference programs at Citrix globally, tracks reference engagement value (REV) — which shows how customer references touch and influence deals that sales wins or closes. In 2014, Citrix’s REV number hit \$250 million in closed/won deals and helped influence an additional \$500 million in pipeline.

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- › **More personally engaged customer relationships.** New software offerings from companies like Dynamic Signal, Extole, and Influitive give B2B marketers many ways to engage customers outside of the traditional testimonial. Participating in challenges that are educational, entertaining, or personally rewarding deepens relationships without the manpower that manual processes require. These applications use digital badges, leaderboards, redeemable points, and other gamification elements to make the advocate experience interesting, fun, and amusingly competitive.⁶

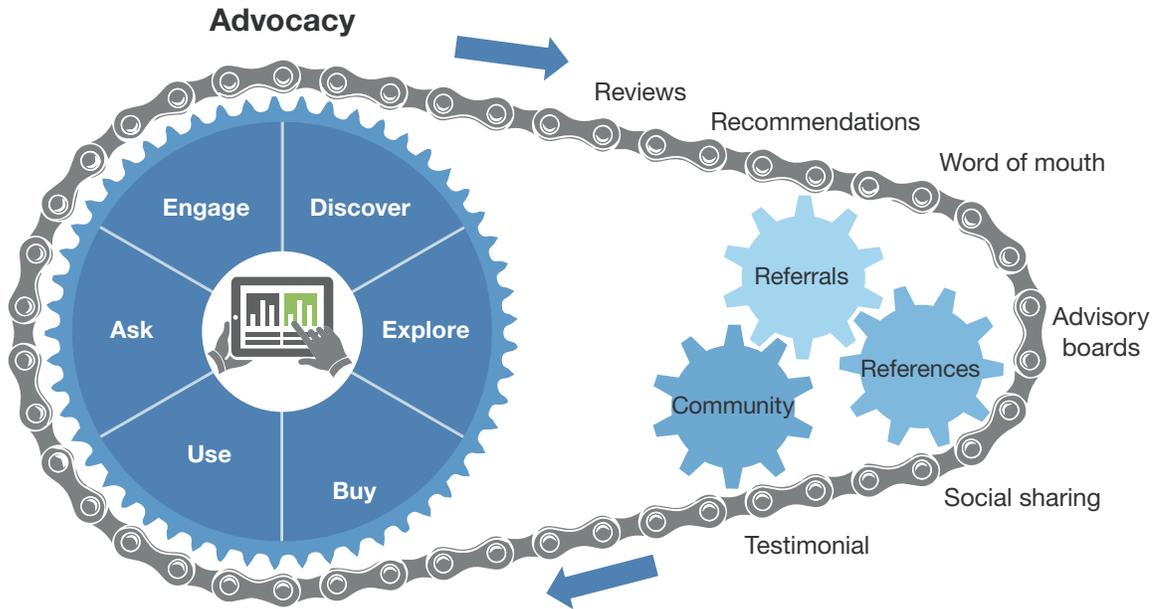
“I have an executive client who is an advocate. Before the program, we did not have a relationship. Now I know what business books he’s reading and we chat about those. The program helps our web of influencers work with every account in this way.” (Holly Zoba, SVP of sales, Signature Worldwide)

- › **Higher brand reach at lower cost.** Advocate marketing multiplies the number and reach of voices talking about you — at a much lower cost than traditional print and paid online channels. Beyond quantity, advocate content and interactions are more valuable because buyers see them as authentic validation, not paid promotion. “Advocacy is more genuine because it is unscripted,” states Lisa Hanna, group manager of customer programs at Adobe. It’s not commercial, either, since Adobe doesn’t offer monetary incentives, like software deals or discounts, to its advocates.
- › **Bonds that remain intact even when buyers change companies.** When talking about why advocates participate and what it takes to keep them involved, we hear words like “emotion,” “commitment,” “passionate,” “love,” and “altruistic.” Not what one would normally associate with rational, fact-based B2B decision-making. Yet programs create deeper customer relationships, ones that go beyond loyalty and satisfaction to something quite personal and reciprocal. “We want to keep the relationship with the individual,” says Merissa Hamilton, manager of customer advocacy at Marketo, “to help them grow their careers — and consider bringing us with them to their next job.”
- › **Happier, energized employees who are loyal to the business.** While customers take center stage in many programs, we were pleasantly surprised to hear about advocate programs that specifically include employees and partners. Dynamic Signal, Mitel, Signature Worldwide, SocialChorus, and Trapit concur that voluntarily sharing interesting facts, news commentary, and helpful brand messages through employee social networks delivers greater, more consistent reach than depending on customers alone. Zari Venhaus, senior manager of global brand and integrated communications at Eaton, a power management solutions provider, summed up the advantage best: “We are 100 years old with more than 103,000 employees working all over the world. Our advocate program keeps them informed and feeling more connected to what’s going on.”

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FIGURE 4 Advocacy Drives Deeper Customer Relationships Over Time

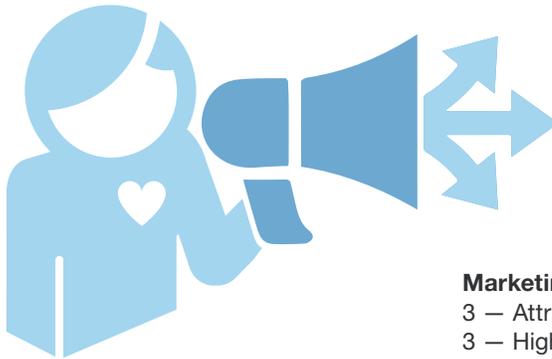


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FIGURE 5 Advocate Marketing Programs Deliver Tangible Topline Value**“What benefits/measured impact have you realized from advocacy programs?”****Revenue impact**

- 10 — Higher conversion rates, more qualified leads, sales efficiency
- 8 — New revenue generated by participants

**Relationship impact**

- 7 — Brand amplification, reach, social engagement
- 6 — Reliable feedback on our ideas/proposed features
- 6 — Better customer relationships, satisfaction, happier
- 5 — Increased cross-sell, upsell, enrichment sales
- 4 — Increased retention/decreased churn

Marketing impact

- 3 — Attribute program impact on pipeline, sales activity
- 3 — Higher customer lifetime value
- 3 — Amplified voice in market

Base: 26 B2B marketing professionals or technology providers
(multiple responses accepted; top 10 shown)

Source: Forrester qualitative research conducted in July/August 2015

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Master The Links Between Advocates, Engagement, And Value

Advocate marketing encompasses the evolution of references, referrals, and customer advisory boards along with the value that comes from digital communities and social sharing. In our research, one thing clearly stands out: The most successful programs focus on participants obsessively. Top advocate programs start by answering “What’s in it for advocates, how will they benefit, and what value will they enjoy?” They never start with “What can they do for us?” To ensure their advocate marketing stays focused on creating value that engages customers and keeps them enthusiastic, B2B marketers must:

- › **Build relationships with buyers — at scale.** Top marketers tap their advocates’ zeal by giving them a microphone to share experiences and helping build their personal brand (see Figure 6). To help small businesses flourish — and eventually become QuickBooks customers — Intuit uses software from Dynamic Signal to collect best-practice content from knowledgeable accountants and share it with their customers via mobile devices and social networking. Alison Ball, head of global influencer programs, and her team elevate and support accounting rock stars, like Stacy Kildal, who share tips and “how-tos” online.⁷ Intuit also aids key associations like America’s Small Business Development Center and The National Association for Community College Entrepreneurship by offering their counselors access to products, content, and experts like Kildal and her fellow ProAdvisors.
- › **Get involved to keep advocates engaged.** Effective advocate marketing requires ongoing and regular communication with participants. Today this entails collaboration between marketing and the emerging area of customer success management (CSM).⁸ Besides monitoring customer health and intervening when metrics dip, CSM programs can identify top advocate candidates based on intangibles like enthusiasm, thought leadership, and charisma. Together, marketing and CSM can provide a greater array of advocacy options — and ways to fund them — and deliver the value and experiences that advocates crave.

“Listen to your advocates, understand their needs, and deliver that knowledge back into your organization. You’ll also need to look at their data and profiles, what they engage in, what they do for you, to learn that. The goal is for advocates to benefit and find value in the program.” (Joan Jenkins, senior director of marketing, Oracle)

- › **Make it worth advocates’ time and attention.** For all of their expertise and passion, advocates still must prioritize their day job. Simple ways to participate and clear expectations, goals, and ways to earn rewards are key to making advocate behavior habitual.⁹ Advocates are motivated by helping others as they help themselves, so it is important to give them VIP treatment with a selection process that feels exclusive and ongoing interactions that give them special access or attention that regular customers don’t get.

“Priority access motivates them. What they love is exclusive access to content, events, and executives — they get addicted to being inside the inner circle.” (Jim Williams, vice president of marketing, Influitive)

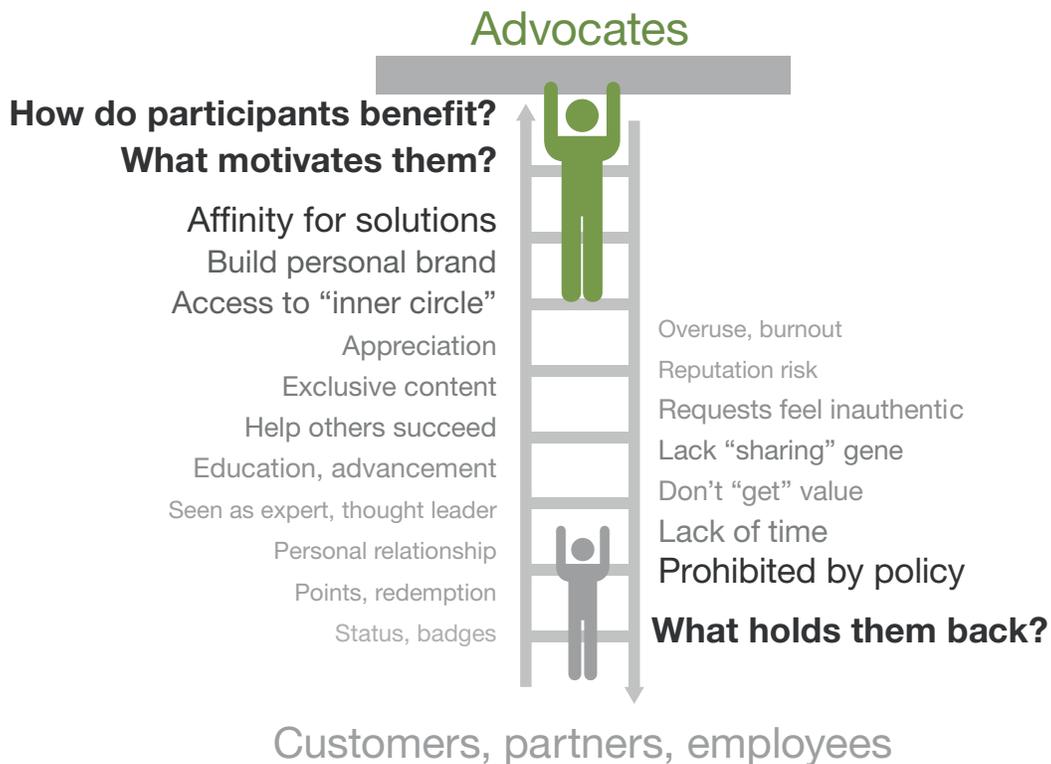
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- › **Express their heartfelt gratitude often and authentically.** Explicit monetary rewards don't motivate advocates. Every program we studied included financial or nonfinancial rewards, yet reported redemption rates were low, ranging from 9% (more typical) to 24%. Celebrating advocate achievements from the simple recognition, like badges, to special award ceremonies at conferences generates more consistent, and tenured, participation. Showing appreciation and saying "thank you" are the simplest and best ways to keep advocates engaged, as Blackbaud's Amy Bills explains: "Having a platform let us grow our advocates and maintain the personal relationship — to say 'we're thinking of you' at scale."

"Simple recognition and gratitude is the biggest driver — but it has to be genuine and authentic."
 (Russ Fradin, CEO, Dynamic Signal)

FIGURE 6 Successful Advocate Marketing Programs Create High Participant Value



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Recommendations**Identify Audience And Purpose To Make Advocate Marketing Flourish**

Delivering tangible contributions in terms of financial results and lasting customer relationships, advocate marketing programs are essential in an age where your ability to gain and keep customers is the last-remaining defensible competitive advantage. To get your advocate marketing programs off to the right start, B2B marketing professionals should:

- › **Pick advocates proactively.** More may be merrier, but successful advocate marketing programs focus on getting the few, right people to participate initially — ones who will help you build business as they benefit from the exposure and experiences you offer. Mike Mothner, CEO at integrated digital agency Wpromote, works backward through his client's "perfect customer journey" to decide which type of advocate is best equipped to tell the most compelling story at appropriate points in the journey: "After deciding on the 'who,' design your program around courting the right advocate profile, not a specific person or company."
- › **Initiate programs around customers who share openly or form communities.** No specific type of person always makes an ideal advocate, but there are general characteristics that foster advocacy to a greater degree. Interviewees agreed that customers who share specific role or industry affinities, inherit the "teaching" gene, or like to network are more likely to advocate. "Formal and informal networking is a progression from reference, to advocate, to community. Nirvana occurs when the community starts to build itself without a lot of blood, sweat, and tears from marketing," says Elana Anderson, SVP of worldwide marketing at Demandware, an eCommerce platform provider.
- › **Match business goals to advocate benefits.** Whether it's chummier relationships between executives or a chorus of social devotees singing your brand praises, you must marry specific business outcomes to the experiences that will most inspire advocates. MRM//McCann's B2B customer experience practice developed and enhanced existing advocate marketing programs for multiple clients that targeted CIOs. With virtually no online or externally visible component, these covert programs created one-to-one relationships. One strategy was to provide newly hired CIOs with a personalized video from one of the client's executives offering congratulations and personal advice along with insightful content and resources to share with their COO and CMO colleagues. The objective? Start relationships early with the key players who will stand up for your brand inside the client's decision-making process.
- › **Downplay monetary rewards.** In practice, few advocates bother to redeem earned points for merchandise, discounts, or other remuneration. Smart marketers recognize this and use points to create interest, but they design programs around participation benefits and experiences like executive access, exclusive information, and personalized attention. While game dynamics, leaderboards, and level achievement may spark notice and appeal to Millennials in particular, it is

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intrinsic value that keeps advocates engaged. As Hank Nothhaft, CEO and founder of advocacy platform Trapit, explains, “Gamification is fleeting; you have to deliver tangible value to a person’s reputation, job, or career to keep them around.”

- › **Go for the experience; wait on the technology.** Fortitude is an essential element of creating a lasting advocate program. B2B marketers need the courage and staying power to stick with programs long enough to get them to pay off. Most interviewees emphasized the need to start with a strategy, not technology, when operationalizing advocate marketing programs. Several recommended running your program manually at first to explore different experiences and learn how to keep advocates engrossed. Once you master the connection between advocate value and business results, layer on the technology to get the program and resources to scale.

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Supplemental Material

Survey Methodology

Forrester conducted an online survey fielded in March and April 2014 of 58,725 US individuals and 6,341 Canadian individuals ages 18 to 88. For results based on a randomly chosen sample of this size (N = 58,725 in the US and N = 6,341 in Canada), there is 95% confidence that the results have a statistical precision of plus or minus 0.4% of what they would be if the entire population of US adults who are online weekly or more often had been surveyed and plus or minus 1.2% of what they would be if the entire population of Canadian adults who are online weekly or more often had been surveyed. Forrester weighted the data by age, gender, income, broadband adoption, and region to demographically represent the adult US and Canadian online populations. The survey sample size, when weighted, was 58,583 in the US and 6,326 in Canada. (Note: Weighted sample sizes can be different from the actual number of respondents to account for individuals generally underrepresented in online panels.) Please note that respondents who participate in online surveys generally have more experience with the Internet and feel more comfortable transacting online.

This survey is part of our North American online benchmark recontact system. Respondents who participate in both of our online benchmark surveys (part 1 and part 2) are invited to also participate in a series of follow-up recontact surveys that cover topics in greater depth and detail. The data from both online benchmark surveys (part 1 and part 2) is appended to each recontact survey's data set so that data cuts can be performed across benchmarks and the recontact itself. Ultimately, this recontact system provides a more holistic view of consumer behavior and allows for more data cutting opportunities than a standalone survey provides.

Forrester's Business Technographics® Global Priorities And Journey Survey, 2015, was fielded to 14,596 business and technology decision-makers located in Australia, Brazil, Canada, China, France, Germany, India, New Zealand, the UK, and the US from SMB and enterprise companies with two or more employees. This survey is part of Forrester's Business Technographics and was fielded from December 2014 to March 2015. ResearchNow fielded this survey on behalf of Forrester. Survey respondent incentives include points redeemable for gift certificates. We have provided exact sample sizes in this report on a question-by-question basis.

Each calendar year, Forrester's Business Technographics fields business-to-business technology studies in 10 countries spanning North America, Latin America, Europe, and Asia Pacific. For quality control, we carefully screen respondents according to job title and function. Forrester's Business Technographics ensures that the final survey population contains only those with significant involvement in the planning, funding, and purchasing of business and technology products and services. Additionally, we set quotas for company size (number of employees) and industry as a means of controlling the data distribution and establishing alignment with IT spend calculated by Forrester analysts. Business Technographics uses only superior data sources and advanced data-cleaning techniques to ensure the highest data quality.

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Companies Interviewed For This Report

Adobe	InsideView
Amplifinity	Intuit
Blackbaud	Marketo
Boulder Logic	Mitel
Ceridian	MRM//McCann
Citrix	Oracle
Demandware	Point of Reference
Dynamic Signal	RO Innovation
Eaton	Salesforce
Extole	Signature Worldwide
Fleetmatics	SocialChorus
HP	Trapit
Influitive	Wpromote

Endnotes

- ¹ Last year, Forrester looked at the state of B2B reference programs and found that despite growing investment, challenges remained. We also found advocate programs capture customer satisfaction and enthusiasm more effectively than reference programs. Advocate marketing programs are more real-time, reactive to customer feedback, and prospects perceive the testimony generated from these programs as more credible by decision-makers. See the [“Tip The Balance From Reference Customers To Advocates”](#) Forrester report.
- ² Net Promoter and NPS are registered service marks, and Net Promoter Score is a service mark, of Bain & Company, Inc., Satmetrix Systems, Inc., and Fred Reichheld.
- ³ In a survey of 236 professional and nonprofessional B2B buyers, conducted in conjunction with Internet Retailer, we found that 53% prefer to gather information on their own and 74% find buying from a website more convenient. These findings support our model, which estimates that of the 4.5 million US workers employed in B2B sales and sales-related professions in 2012, 1 million, or just over 20% of all B2B salespeople, will be displaced by self-serve eCommerce by 2020. See the [“Death Of A \(B2B\) Salesman”](#) Forrester report.
- ⁴ Source: Forrester’s North American Consumer Technographics Online Benchmark Survey (Part 1), 2014.
- ⁵ In 2011, Forrester first made the claim that the world has entered the age of the customer. Since then, the urgency for change has only increased. Years of recession and uncertainty have weakened overall demand and favored customers over suppliers. The age of the customer is real, and it is permanent. To succeed, companies must focus strategy and budget on the technologies, systems, and processes that win, serve, and retain these more powerful customers. See the [“Winning In The Age Of The Customer”](#) Forrester report.

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- ⁶ The idea of using points and redemption to reward customer behavior is nothing new. What is new is the idea of using these traditional B2C approaches to create more ways to incentivize B2B buyers to share experiences, renew, remain loyal, and add their voice to the market. See the “[B2B Loyalty, The B2C Way](#)” Forrester report.
- ⁷ Kildal is an internationally recognized expert in QuickBooks Online and has made numerous accounting accolade lists, including being named one of 100 Most Influential People in Accounting in 2015. Through her blog, training, and client services, she and her team help make QuickBooks more accessible and useful to business owners. To learn more, visit her company site. Source: “About Us,” Kildal Services (<http://kildalservices.com/about-us/>).
- ⁸ As the economy becomes more service-oriented, the duration of the customer relationship has an economic impact on a company’s financial health, since the value of the purchase is realized over time. Companies must actively manage their customers to ensure their success in order to decrease churn and increase revenue and advocacy. See the “[Market Overview: Customer Success Solutions](#)” Forrester report.
- ⁹ Whether building a program that serves your sales channel partners or creates new ways to engage with existing customers, three factors determine your strategy direction: 1) the essential/uniqueness of your offerings, 2) the number of intermediaries in the channel, and 3) the frequency of revenue recognition events within an account. See the “[B2B Loyalty, The B2C Way](#)” Forrester report.

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