

Getting Serious About Reference Program Automation, by Heather Watkins, Director, Customer Marketing, Marketo



references, and more.

Many reference programs use only a small fraction of the technology resources they have—which might include some combination of Salesforce, a reference management system, a marketing automation system and the like. It's a bit like using only 10% of the total capability of your laptop or smart phone. Heather will show how to make much better use of such technology to automate mundane and time consuming tasks such as: creating alerts to contact potential references 90 days after a successful implementation, managing an employee reference nomination process, conducting reference surveys plus auto-followups to survey non-responders, managing data update campaigns filled out by customers and auto-synched to reference database, sending out gifts and thank yous to

Marketo delivers [marketing automation](#) and sales effectiveness software to help fuel our customers' growth and profitability. Recently, we revamped the technologies we use for our customer advocate program and are now using marketing automation to blow away our goals.

We replaced time-consuming manual processes and archaic spreadsheets with labor-saving, automated applications and high-performance relational databases. We did this to not only liberate labor hours spent on mundane tasks like customer advocate data entry, but to also make time to focus on strategic initiatives that are critical to our success.

A good example of that is our goal to mass recruit customers into our advocate program. That's a strategic goal because our program is a strong customer-retention driver—Marketo Advocates renew at a higher rate than non-participants. Today, we do just that—we run a continuous recruitment campaign on a mass basis.

However, this, plus a whole slew of other benefits (industry awards and a significant increase in advocate member activity to name a few) never would have happened unless we got serious about automating many of our advocate program activities. What follows is a discussion of how we achieved this end.

Marketo's automation and advocate activity goals

We set four main goals to migrate our systems and processes onto automated platforms and to increase the Return on Advocacy that our advocates deliver to Marketo.

1. Goal #1: Migrate from an account-based advocate system to a person-specific based advocate system.
2. Goal #2: Increase the value of advocates by leveraging automation and advocate self-service behavior to refresh data and keep it current.
3. Goal #3: Use automation to significantly reduce the labor hours spent on time-consuming, low-value advocate program work.
4. Goal #4: Leverage automation technologies to significantly increase the

point of reference®

number and quality of Marketo advocates and associated activities.

I'll talk about each of these in turn.

Goal #1: Migrate to a person-specific-based advocate system

Previously, when we organized our advocate database in terms of accounts, we were plagued by a number of drawbacks.

- Advocates moved regularly and the reference's account-specific knowledge went with them.
- The move would place the account was "on hold" until a new reference at the company was recruited.
- Our program participant report showed flat growth. New recruits marginally outnumbered losses though our team spent countless hours on recruitment efforts.

At the time, our systems to reconnect with moved advocates and to maintain our relationship with them on an on-going basis were weak. So instead of putting more time into an unsatisfactory system, we changed the way we tracked advocates.

The first thing we did was to standardize the data on Salesforce as our primary database that fed into our reference request software, Boulder Logic. The Salesforce application gives us greater data management control as well as opportunities to automate. Next we simplified our database fields and set them up to match our sales process. After that, we pulled, cleaned and purged our database.

The net result of these changes were:

- **Grew number of available advocates.** If we have three advocates at each account, we aren't counting them as "one" account reference anymore, we count them as three advocates. This is because they all can speak to different experiences. Also—if they move to a new company, we can still count them as an advocate instead of a "churning" an entire account.
- **Increased the value of available advocates.** Previously, the "churned" advocate experience was in effect lost as their replacement could not speak to their predecessor's experience with Product A. Now, we salvage that experience when we follow them to their next company and can leverage their specific experience appropriately to share with prospects.
- **The completion of this project positioned us to implement all the automation systems and processes described below.**

Goal #2: Increase the value of advocates by keeping data current

The previous processes required us to complete extremely time-consuming data entry to keep thousands of fields updated. As an example, it could take a half hour to enter all the data associated with a newly-recruited advocate. So rather than continue down this path, we chose to shift from an in-house advocate data-

management model to an advocate self-serve data update model. The migration of data into the Salesforce CRM database made it possible for us to automate this process.

The next step was to develop and implement a marketing campaign and data-entry form to have customers update their own data (see email sample in Figure 1 below.)

CUSTOMER ADVOCATE PROGRAM

We are revamping the data within our Customer Advocate Program to ensure that we can better serve our customers. We would greatly appreciate you updating your record!

★ First Name:
Heather

★ Last Name:
Watkins

★ Email Address:
heather@marketo.com

Figure 1: Automated marketing email to get advocates to update their own information.

These changes gave us a couple of benefits.

- Users access timely data to all but eliminate stale data time wasters (“I don’t do reference calls any more, but I do speak at conferences.”)
- Eliminated an average of 0.5 hrs/advocate on initial data entry.

Goal #3: Use automation to significantly reduce the labor hours spent on low-value activities

Previously, we tracked a lot of things in Excel and updated the data in spreadsheets manually. Together with our other manually-intensive processes, these activities took a heavy toll on our productivity.

For example, a high-value but very time intensive activity like advocate recruitment took hours to research and fulfill, but it was extremely hard to carve out a block of time each week for that activity. Once we’d find who we wanted to invite into the program, it was extremely time intensive to send out invitations to the program and we found ourselves stressing at the end of the month to meet our goals.

Another example would be our new advocate on-boarding process. Before categorizing someone as an advocate we’d have to invest an average of 1.5 hours per person (interviews, note taking, updating spreadsheets etc.) Clearly this time-intensive process was not scalable and therefore did not sufficiently support our goal to recruit many more advocates.

All that changed when we upgraded our processes to utilize marketing automation systems.