START WITH THE CUSTOMER

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OVER
BURDEN

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REVIEW WHAT?

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COMPETITOR REFERENCE

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WHAT ABOUT MY TEAM?

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UNHAPPY
REFERENCE
CUSTOMER

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VAGUE
RESOURCES

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STALE REVIEWS

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WHY AN ADVOCACY LADDER?

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ADVOCACY DEFINED

- **Tangible Request**

- **Drive Business Value**

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ADVOCACY DEFINED

- **Process Drive**

- **Saved Time**

- **Strong Templates**

- **Reduce Risk**

- **Maximize Opportunities**

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BOOTSTRAPPED

- High Impact

- Low Cost

- Maximize Customer Base

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HOW DOES A CANADIAN ASK A CUSTOMER FOR A REFERENCE?

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PRIORITIZATION & ORGANIZATION

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BEHIND THE CURTAIN

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THE FIRST RUNG
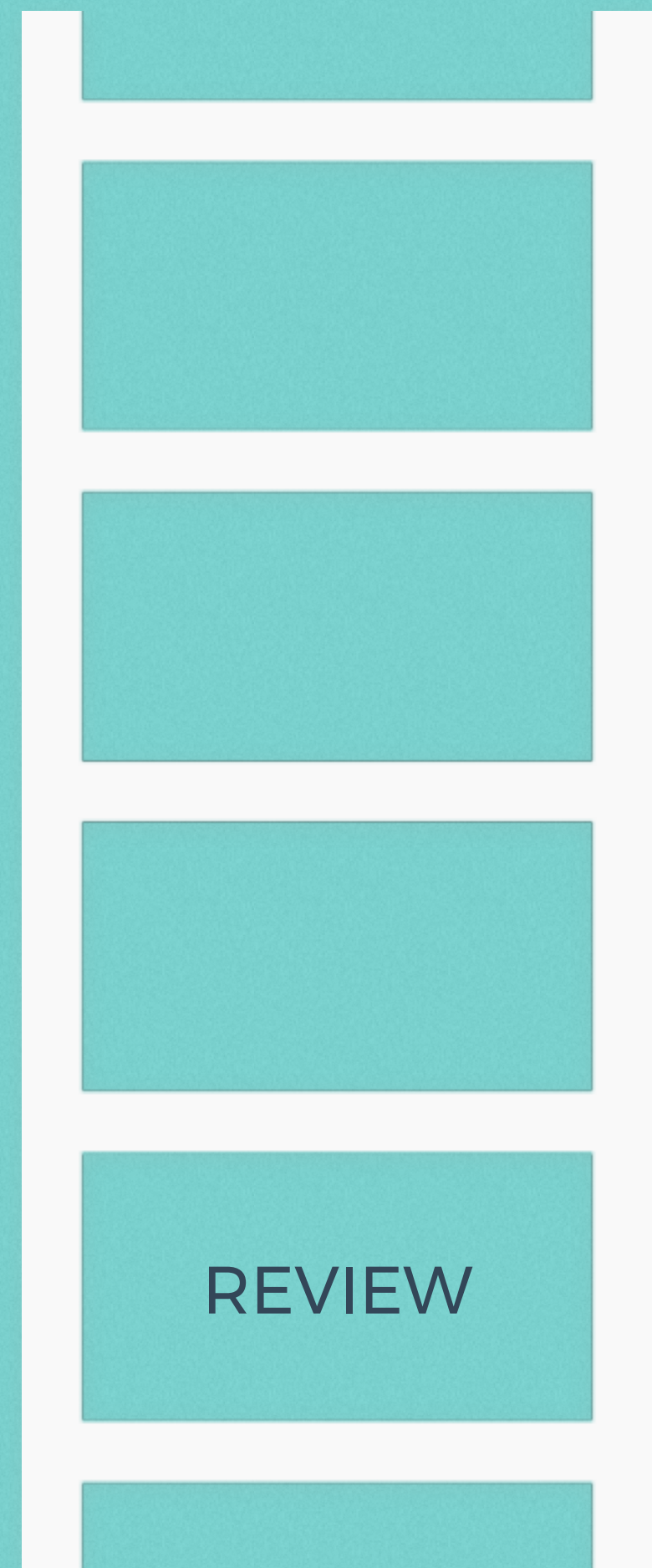
REVIEW

The Ask
Write a review of your experience with our platform and the team!

Risk
Low

Timing
90 Days

The Value
· Lead Generation
· Brand Awareness
· Trust Building

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TIME'S NOT RIGHT?

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STEPPING UP

REFERENCE

REVIEW
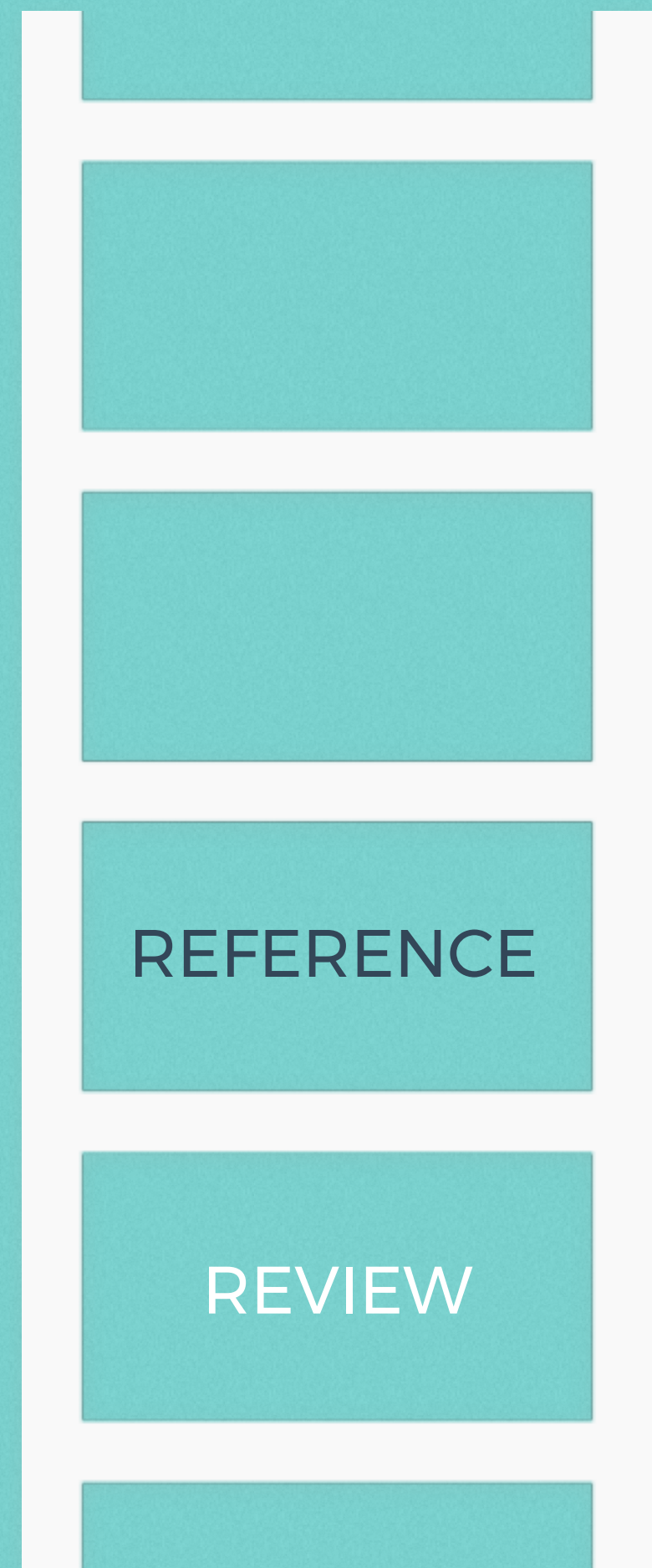
The Ask
Chat with a prospect

Risk
Medium

Timing
6 months

The Value
· Trust Building
· Closing of deals

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GETTING STUCK

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ELITE TIER

CASE STUDY

REFERENCE

REVIEW
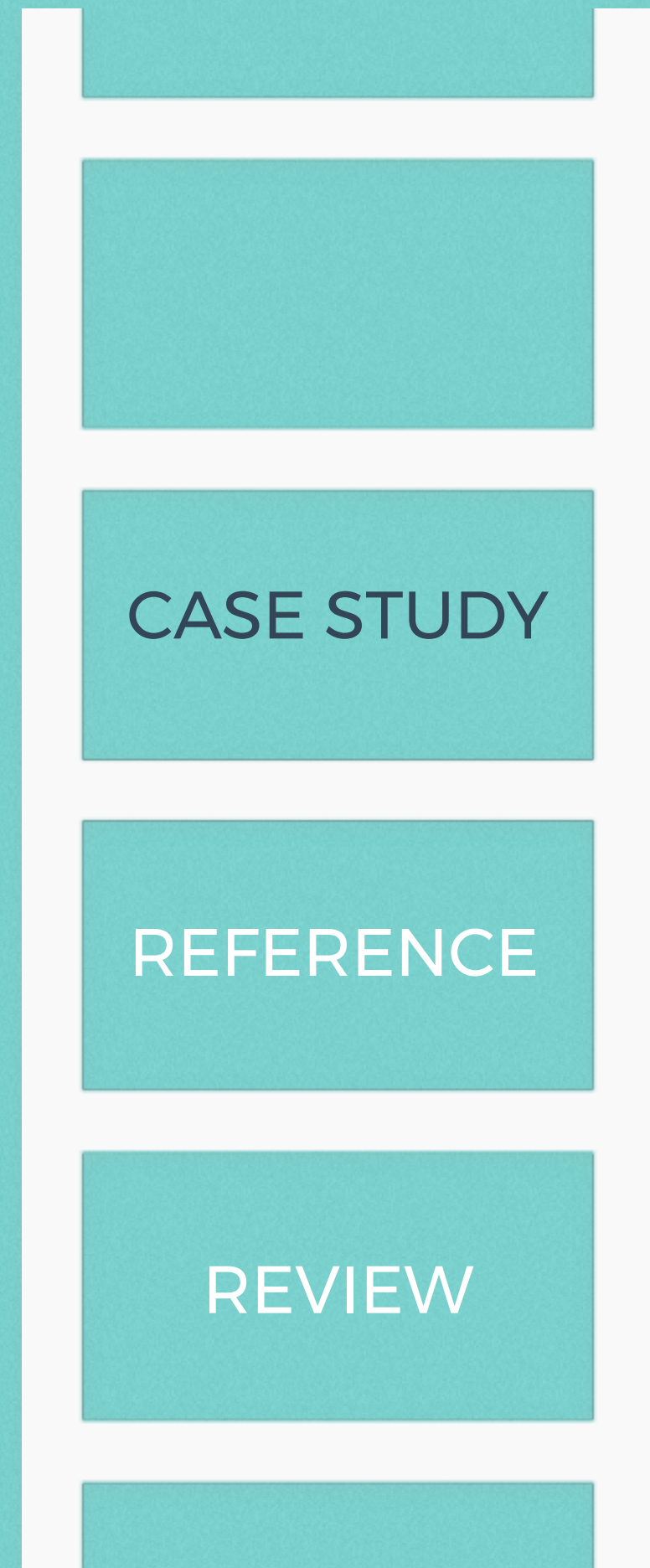
The Ask
Be featured in a case study

Risk
Medium - High

Timing
1 year

The Value
· Lead Generation
· Proof of ROI
· Thought Leadership

THE BIG KAHUNA

SPOTLIGHT

CASE STUDY

REFERENCE

REVIEW

The Ask
Co-host a webinar

Risk
High

Timing
6 months post case study

The Value
· Thought Leadership
· Prospect education

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Scaling RFPS

The Journey from Organized Chaos to Multinational Organization

MERGE
An IBM® Company

10X RFPS

Managing 100+ RFPs With 200+ Collaborators

sprinklr

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PROBLEM SOLVED

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WITH ADVOCACY LADDER

· Amplify Loopio's brand awareness

· Position ourselves against competitors

· Move prospects down the sales funnel

· Build customer relationships instead of risking them

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THE VALUE OF
PROCESS

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CUTE PICTURES...
BUT SHOW ME THE NUMBERS

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OUR SUCCESS

- 36% of customers have written a Review

- 30% of customers are References

- Developed 7 Case Studies

- Hosted 4 Spotlight Webinars
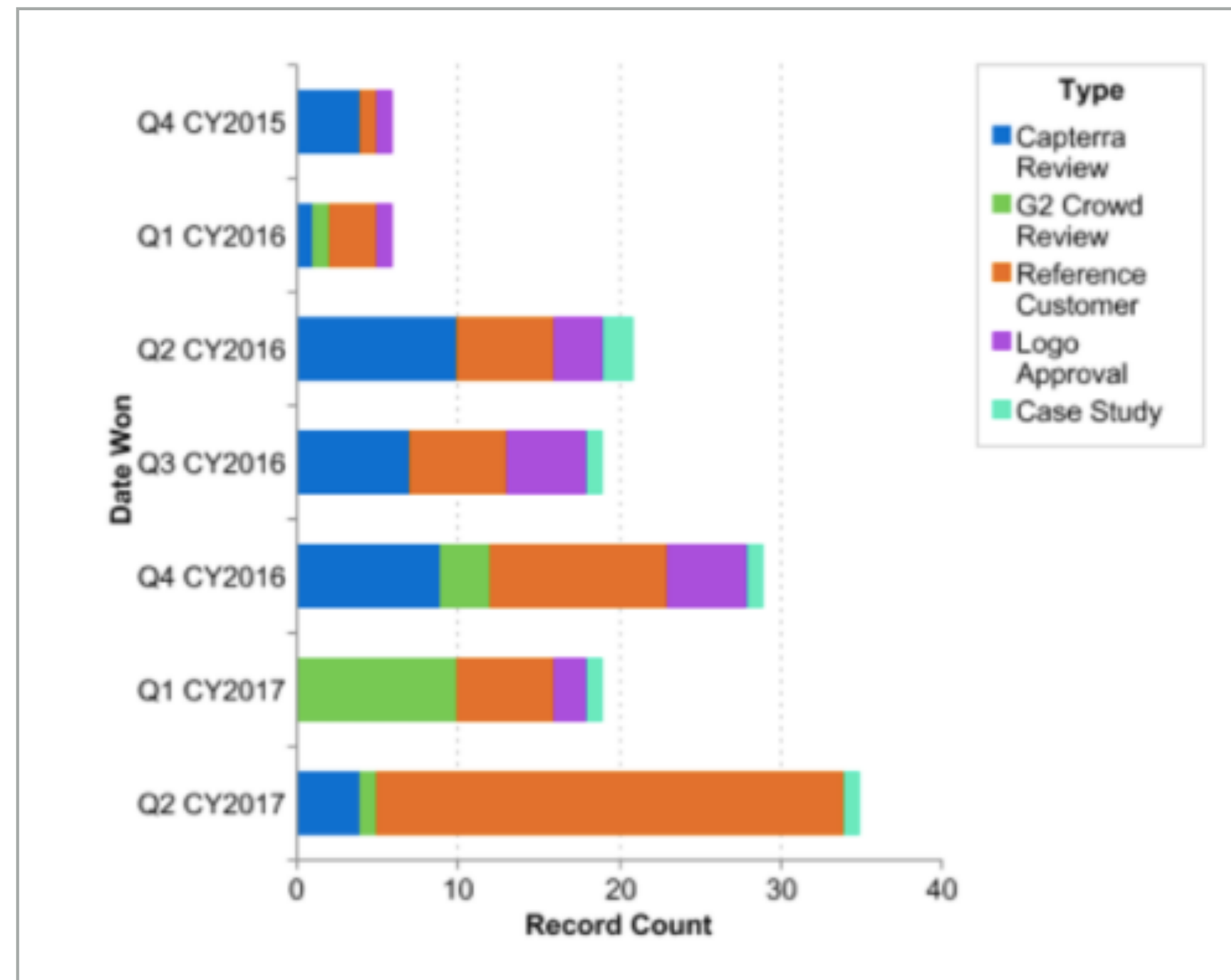
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THANKS TO ADVOCACY LADDER

- **Strong Reviews on Capterra and G2Crowd**
  - G2 Crowd: Selected for March SaaSness
  - G2 Crowd: Named 'High Performer' for our Category

- **Reduced load on Reference Customers**
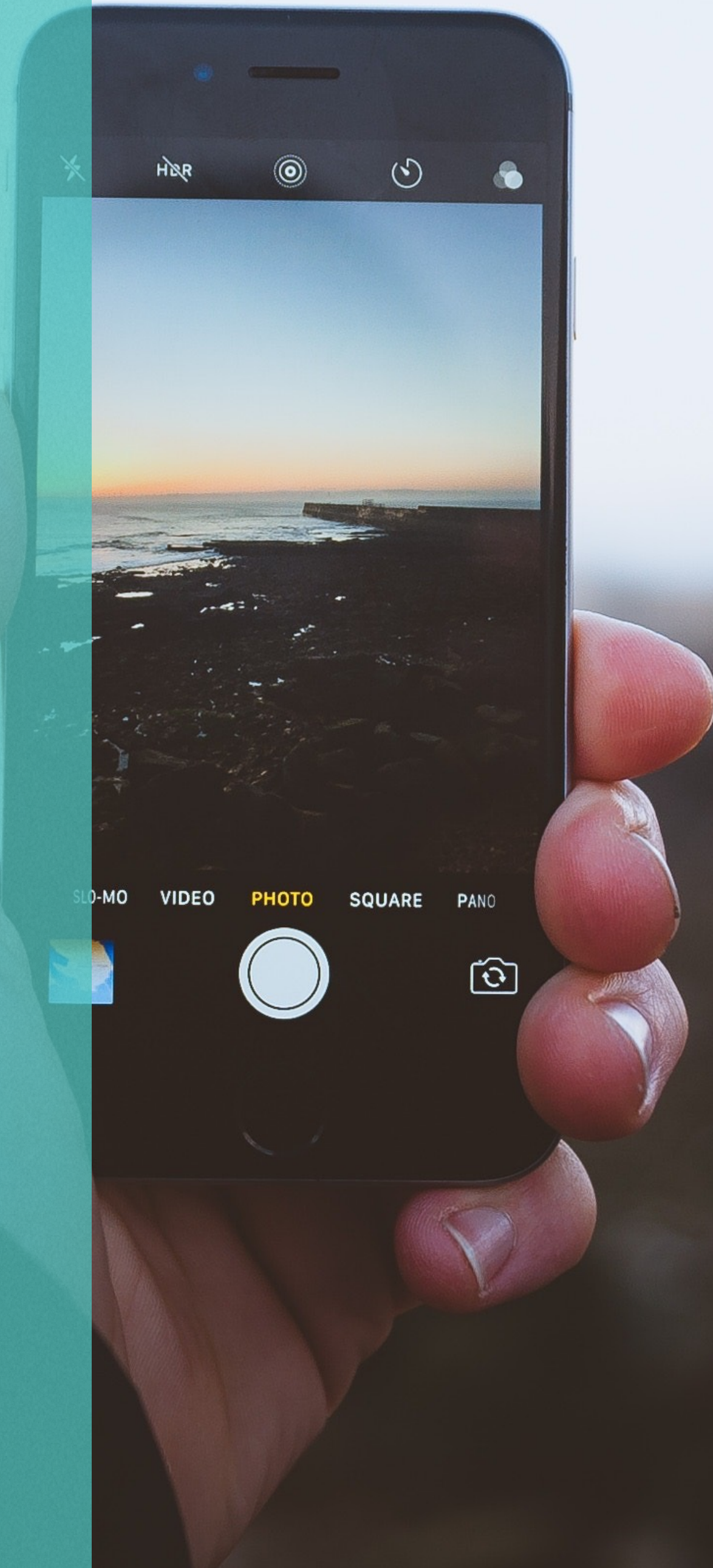 - Frequency from approx. every 6 weeks to quarterly

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SCALABLE & TRACKABLE

- Systematic and Scalable

- Reduced load for CSMs

- Clear Advocacy tracking

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CREATING YOUR OWN LADDER

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PHONES OUT!

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YOUR VERY OWN ADVOCACY LADDER

1. Identify advocacy asks

2. Rank advocacy activities by risk and investment

3. Create email templates

4. Create trigger points

Don't forget your existing customer base!

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NEED A
HAND?

Sara Masson
Sr. Customer Success Manager, Loopio

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THANK YOU!

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Innovator of the Year Finalist

Loopio's Customer Advocacy Ladder

Sara Masson

Senior Customer Success Manager

Loopio

platinum sponsor

Service ROCKET