

Customer advocacy template

Customer advocates can facilitate success when working alongside sales and support teams. They play a key role in:

1. Maintaining customer relationships
2. Enhancing brand awareness
3. Providing insights and assistance to other customers
4. Improving product launches

This five-step process outlines how product marketers can build and optimize their advocacy programs.

Steps	Goals
1. Engage with your customers	To understand the customer on a deeper level
2. Identify customers	Potential brand advocates
3. Reach out	Asking for feedback
4. Automate tasks for teams	Collaborate with teams
5. Share social proof	Prove brand value through social proof

1. Engage with customers

Customer touchpoint	Timeframe	Tasks
Onboarding	90 days	<hr/> Send welcome messages <hr/> Talk to your customers <hr/> Conduct virtual events <hr/> Ask them to participate in webinars

2. Identify customers willing to give reviews

Customer touchpoint	Time frame	Tasks
Adoption	6 months	<p>Product tutorials</p> <hr/> <p>Create and curate content to help them achieve more</p> <hr/> <p>Conduct business reviews to showcase the value and future goals</p> <hr/> <p>Conduct joint webinars</p> <hr/> <p>Identify</p> <hr/> <p>Which customers do you share the best relationships?</p> <hr/> <p>Which customer can give case studies?</p> <hr/> <p>Who can provide testimonials?</p> <hr/> <p>Which customer is willing to part with reviews?</p>

3. Reach out to the decision maker

Timeframe	Tasks
3 months	Reach out to the decision maker (in your customer's org)
	Ask for specific feedback

4. Automate tasks for sales and marketing teams

Timeframe	Tasks
2 weeks	Once feedback is received, set up tasks for marketing and sales team to: <ol style="list-style-type: none">1. Send out "thank you" emails2. Convert it into a case study and/or video testimonial3. Share it with your customer to get his consent before publishing

5. Share social proof

Timeframe	Tasks
2 weeks	Publish it on your website and share it on your social media handles