

The CSM's Guide to Customer Advocacy

Episode 16 Companion Download

This companion guide provides the frameworks, templates, and action steps discussed in Episode 16. Use these tools to build systematic customer advocacy programs that create mutual value for your customers and your business.

Advocacy Readiness Assessment

Use this framework to identify which customers are ready for advocacy participation. Remember: advocacy readiness shows up in customer actions, not just their words.

Behavioral Indicators

Look for customers who demonstrate these behaviors:

- Achieved measurable business outcomes they can quantify
- Expanded their usage significantly without being pushed
- Voluntarily shared positive feedback about your solution

Five Assessment Criteria

Once customers demonstrate behavioral indicators, evaluate them against these five criteria:

Criteria	What to Look For
1. Measurable Outcomes	Specific metrics that demonstrate clear ROI or competitive advantage. Not "we like it" but "we reduced incidents by 60%" or "saved 400 hours per quarter."
2. Credible Reputation	Recognizable brand, strong industry presence, or title/responsibilities that carry weight with your target market. When they speak, people listen.
3. Strong Relationships	Stakeholder relationships across multiple organizational levels. Executive sponsorship, operational buy-in, and end-user adoption. Depth of relationship makes advocacy credible.
4. Willingness to Share	Comfort level with public visibility. Some prefer speaking, others prefer written testimonials or private reference calls. Understand their preferences before asking.
5. ICP Alignment	Industry relevance matters. Best advocates look like the customers you're trying to win. Financial services case study won't carry same weight for retail prospects.

Three-Tier Advocacy Framework

Advocacy isn't binary. Match the advocacy tier to customer capacity and interests:

Tier One: Minimal Time Commitment

Time Required: 15-30 minutes per quarter

Activities:

- Brief testimonial quotes (1-2 sentences)
- Customer logo/name listed on website
- Reference calls with qualified prospects (15-20 minutes)
- LinkedIn recommendation or endorsement

Best For: Customers who appreciate value but have limited time. They're willing to support you, but it needs to be easy.

Tier Two: Moderate Time Commitment

Time Required: 2-4 hours per quarter

Activities:

- Case study participation (interview + review)
- Webinar co-presentation
- Conference speaking opportunities
- Thought leadership blog posts or articles

Value for Participants:

- Professional development and thought leadership building
- Industry visibility and networking opportunities
- Content they can share on LinkedIn to build personal brand

Best For: Mid-career professionals building their reputation. They want to be seen as experts and are looking for platforms to demonstrate expertise.

Tier Three: Significant Ongoing Engagement

Time Required: Monthly time investment

Activities:

- Advisory board participation
- Product beta testing and feedback
- Ongoing strategic consultation

Value for Participants:

- Exclusive access to product roadmap
- Direct influence over solution development
- Strategic relationships with your executive team

Best For: Strategic customers with significant deployments who are deeply invested in your success because it directly impacts theirs.

Advocacy Value Delivery Framework

Sustainable advocacy requires continuous value delivery between requests. Use these four pillars to nurture advocacy relationships:

Value Pillar	How to Deliver
Industry Insights	Send research reports, analyst briefings, trend analyses. Help them make better strategic decisions for their organization.
Networking Opportunities	Introduce them to peers with similar challenges. Connect them with industry leaders. Create opportunities to build their professional network.
Strategic Consultation	Provide perspective when they're evaluating technologies or planning initiatives. Share what you're seeing across your customer base.
Recognition Opportunities	Speaking engagements, published case studies, award nominations, thought leadership platforms. Enhance their industry visibility.

Advocacy Roster Tracker

Maintain a quarterly tracker with these fields:

- Customer Name
- Advocacy Tier (One, Two, or Three)
- Measurable Outcomes Achieved (specific metrics)
- Interests/Preferences (speaking, writing, private calls, etc.)
- Activities Participated In (case studies, webinars, conferences)
- Last Engagement Date
- Next Planned Outreach

Review and update this tracker quarterly to identify new advocates, check in with existing ones, and ensure you're not over-relying on the same customers.

Advocacy Request Email Templates

Frame advocacy requests as opportunities, not favors. Here are three templates for different advocacy tiers:

Template 1: Tier One - Brief Testimonial

Subject: Quick Win to Highlight - Would Love Your Perspective

[Customer Name],

Your team's success with [specific outcome - e.g., reducing incidents by 60%] has been exceptional, and I think other security leaders would benefit from hearing about your approach.

Would you be comfortable providing a brief quote (1-2 sentences) about the business impact you've achieved? We'd feature it on our website and in marketing materials to help prospects understand what's possible. This would take about 5

minutes - I can even draft something for you to review and edit. Let me know if you're open to this. Either way, thanks for being such a great partner.

Best,

[Your Name]

Template 2: Tier Two - Webinar Speaking Opportunity

Subject: Speaking Opportunity - Industry Webinar with [Industry Analyst/Leader]

[Customer Name],

We're planning a webinar on [topic] for [date], and I immediately thought of you. Your success with [specific achievement] would resonate with the audience (expecting 1,000+ security leaders), and this could be great visibility for you professionally. The panel will be moderated by [well-known analyst/expert], and previous panelists have told us they received speaking invitations at other events afterward. The format would be:

- 40-minute panel discussion
- You'd share your experience implementing [solution/strategy]
- Q&A with the audience
- Professionally produced recording you can share on LinkedIn

Time commitment: 1 hour prep call + 45-minute live webinar. I'm happy to help you prepare talking points and handle all the logistics. Interested?

Best,

[Your Name]

Template 3: Tier Three - Advisory Board Invitation

Subject: Invitation to Join Our Customer Advisory Board

[Customer Name],

Given your strategic use of our platform and the innovative approaches your team has developed, I'd like to invite you to join our Customer Advisory Board. Here's what this involves:

Commitment:

- Quarterly meetings (virtual, 90 minutes)
- Occasional product feedback sessions
- Early access to roadmap discussions

What you get:

- Direct influence over our product direction
- Exclusive early access to new features
- Networking with other strategic customers
- Direct access to our executive team and product leadership

Our advisory board members tell us they value the strategic relationships and the ability to shape the product to their needs. Given your [deployment scale/innovative use case/strategic partnership], I think you'd be a perfect fit. Can we schedule 15 minutes to discuss?

Best,

[Your Name]

Advocacy Program Measurement

Track these metrics to ensure your advocacy program delivers value for both your business and your participants:

Business Value Metrics

- Reference Call Conversion Rates: What percentage of reference calls result in closed deals?
- Event Attendance & Engagement: How many people attend webinars/conferences? Are we generating leads?
- Lead Generation from Case Studies: Are published case studies driving inbound interest? Are sales teams using them?

Participant Value Metrics

- Participant Satisfaction Scores: Did the experience meet their expectations? Would they participate again?
- Professional Development Outcomes: Did they get speaking invitations? LinkedIn engagement? Career advancement?
- Ongoing Engagement Levels: Are advocates participating in multiple activities? Introducing us to peers? Is the relationship sustainable?

Action Steps: Build Your Advocacy Program

Use these steps to implement systematic advocacy in your portfolio:

This Week

- Review your customer portfolio and identify 3-5 customers showing behavioral advocacy indicators
- Run those customers through the five-criteria assessment
- Assign each customer to an advocacy tier based on their capacity and interests

This Month

- Create your advocacy roster tracker with all identified advocates
- Begin value delivery (send industry insights, make introductions, offer consultation)
- Make your first advocacy request using the appropriate tier template

This Quarter

- Complete at least one advocacy activity (testimonial, case study, webinar, etc.)
- Measure outcomes using the business and participant value metrics
- Document your advocacy process so it can be replicated and scaled
- Identify 2-3 additional customers who could be developed into advocates

Next Steps and Resources

This guide is part of the Expansion, Advocacy, and Growth mini-series on ClearPath Conversations:

- **Episode 15:** How to Spot Expansion Opportunities in Plain Sight
- **Episode 16:** The CSM's Guide to Customer Advocacy
- **Episode 17:** How to Introduce CS-Led Upsell Without Feeling Salesy

Additional Resources:

- *The CSM's Personal Playbook:* Systematic frameworks for expansion detection, qualification, and revenue growth
- *ClearPath CX Website:* Templates, frameworks, and resources at ClearPathCX.com
- *LinkedIn:* Connect with Mark at linkedin.com/in/markbernardin