

# 43 Tips for Improving Your Reference Program

Developed by the Mastermind Sessions  
Customer Reference Forum, Fall 2006: Dallas, Texas

## A Customer Reference Forum Report

*Following are 43 tips developed in the course of the Mastermind sessions held at the Fall 2006 Customer Reference Forum. The Mastermind groups consisted primarily of practicing customer reference professionals from many of the world's top reference programs, with support from vendors in this field.*

### Mastermind Group Leaders

The Mastermind groups were led by top reference professionals in the field, including:

**Tami Andrews**, Customer Endorsements, Dell

**Carol Blumberg**, Corporate Communications Manager, Epicor Software Corporation

**Mary Eileen Farley**, Director, Customer Reference Program, Hitachi Data Systems

**Oguzhan Genis**, Director, Customer Value & Reference Services, SAP

**Martha Gerhan**, Vice President, ROI Solutions, Mainstay Partners

**Barbara Krasner**, Director, Customer Advocacy Marketing, Lucent Technologies

**Rhett Livengood**, Director, Worldwide Marketing, Intel Solution Services

**Gayle McClary**, Sr Director, Global Customer References, Oracle

**Terri McClure**, Director, Customer Success Network, EMC

**Liz Pedro**, Customer Programs Manager, Landesk

**Julie Seltzer Firsty**, former, Sr. Mgr, Customer Programs, Hyperion

If you're struggling with any of these key issues in reference management, you'll find guidance here:

- Making the Business Case for a Customer Reference Program
- Getting Customers to Disclose Return on Investment
- Scaling a Customer Reference Program
- Integrating with Sales
- Acquiring and Retaining References

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## Making the Business Case for a Customer Reference Program



### 1. Identify stakeholders and set goals that meet their needs

This is not a trivial task. Obviously, the sales organization is a key stakeholder in every company. But it's important to ask who else are the key constituents and what are their needs? What are the results and successes they're looking for from the customer reference program?

Setting targets, goals, and results based on who those stakeholders are—whether it's by region, C-level, or other level in the organization—is critical. The goals and results that you set for C-level stakeholders will probably be quite different than the goals and results by which you measure your own team. So identifying key stakeholders, setting targets, and getting agreement around what success looks like is important.

### 2. Link reference activities to the sales process

Whether you're enabling the closing of deals, facilitating lead generation, or helping the field move up the "stack" (or hierarchy) at their customer base, these are the things that best practices facilitate. Again, a clear linkage to sales and sales organizations is absolutely essential to make this work.

### 3. Cultivate a senior executive sponsor or sponsors

Beyond a stakeholder, a sponsor is someone who is responsible for or at least has a lot of influence on what the program should be. Ideally, this person needs to be at a very high level. Some reference programs have Chief Marketing officers as their executive sponsors. In other cases, sponsors go all the way up to the Board—which is often keenly interested in the products, offerings, and results that the customer reference program produces.

### 4. Focus on results and report them

There was consensus among our discussion group that this is a huge area where reference managers need to get into a "rhythm." This includes reporting frequently, but selectively. Reference managers have a tendency to report on a lot of things that they do rather than on results that really matter. It's well worth the time to analyze the results you want to focus on; that's what you want to report. Again, stakeholders play a key role, because what the CEO cares about will be vastly different from what another stakeholder cares about, and different again from what your team is reporting on.

### 5. Know your program's value proposition

Every company has products or services that they offer to their customers. What are your *reference program's* products and services? What is the value proposition you are offering to your stakeholders? Is it clear? Is it easy to understand? How are your products and services used? It is critical that you answer these questions for your customer reference program.