



## How an Operational Approach to Customer References Feeds Both Marketing and Sales

By Gary M. Katz

About five years ago, I walked into Shoreline Communications as the new director of communications and corporate marketing. After completing my first objective – helping to re-brand the enterprise phone company from Shoreline to [ShoreTel](#) – I realized I had a significant challenge ahead:

- ShoreTel had great customer loyalty, which needed to be leveraged as a significant competitive advantage in the market.
- Our marketing programs depended heavily on great customer references – webinars, seminars, case studies, media relations, analyst relations, speaking engagements.
- The company's sales channel model provided neither the structure nor motivation for Sales to collect timely customer reference data. Once the deal was done, the heavily lifting was passed to a channel partner and Sales was on to something else.
- The same customer references were being burned out, used over-and-over again. Why? Because with more than 1200 customers and more than 150 channel partners at the time, no one wanted to assume responsibility for qualifying and managing these customer references.
- My success was directly related to being able to tap into this rich pool of customer references.

At that time, I didn't know about [Boulder Logic](#). I didn't even know what [Marketing Operations](#) was. I just knew I wasn't getting anywhere trying to qualify these references on an ad hoc basis.

So I worked with a consultant to design a [customer reference process](#) aimed at developing a robust and renewable pipeline of customer references – just like a sales pipeline.

Specifically:

- ShoreTel's customer database was categorized, continuously updated and mined for strong reference candidates
- All references were qualified for use in marketing and sales efforts
- Qualified references were matched to appropriate marketing, public relations or sales opportunities
- Select customer references were converted into case studies or e-newsletter articles, or used in webinars, editorial calendar, article, analyst research or speaking engagement opportunities
- We began formally tracking all active references, including customer contact info, channel partner info, reference type, usage log and color-coded status information

Since that time, ShoreTel's customer reference program has grown from about 20 qualified references to more than 1000. The program generates approximately 25 new case-study candidates every quarter. The public relations team has a ready supply of credible references to present to editors and analysts as publicity opportunities arise or are uncovered.



But most importantly, within months of rolling out the program, the major benefactor and requester shifted from Marketing to Sales. Today, ShoreTel Sales relies on this program to identify references that help it win strategic deals in new vertical markets and new geographic territories.

And who do you think helps them find the best matches for their requests? The same consultant I hired to implement the program one day a week back in 2004! Dick has out-survived four of my successors and his value (and workload) is greater than ever, even in a miserable economy.

So let's get with it, people! Odds are, your customer reference effort is suboptimal. Bringing operational discipline to your customer references is not only a [Marketing Operations best practice](#), it's a proven way to increase your value and contribution to your company's success.

Today, you have great tools like [Boulder Logic](#) to make the customer reference process even more effective.

Think about it. What other marketing program can simultaneously influence your company's customer lifetime value, ensure that valuable Voice of the Customer insight is collected and utilized in marketing, potentially transform your customers' technologists into industry rock stars, and help Marketing become Sales' best friend by increasing the velocity of the sales pipeline?

With a heightened emphasis on [Marketing optimization](#) and ROI, today you can't afford to miss this golden opportunity.

## Call to Action

If your company is facing challenges in any of the areas discussed in this article, or if you are thinking about creating a marketing operations function or increasing the effectiveness of the one you already have, you should start with a "current state assessment" that will help you evaluate the overall health of your marketing and/or Marketing Operations today. Doing so will help you zero in on those areas that represent your most difficult challenges as well as your greatest opportunities for bringing the significant benefits of MO best practices to your organization.

## About the Author:



Gary M. Katz is founder and chief strategy officer of Marketing Operations Partners, a firm that helps enterprises overcome dysfunction, execute strategy, build shared vision and accountability, and strengthen strategic impact in all areas of marketing. To find out more, please contact Gary at [gary.katz@mopartners.com](mailto:gary.katz@mopartners.com).