SOLUTIONS BRIEF

Advocate Personas and Journey Mapping
Executive Summary

Leveraging a dynamic, multidimensional persona segmentation and journey mapping model, advocates can be targeted with activities and challenges based on their needs, role, and preferences. Knowing when and how to engage with each advocate persona personalizes the advocacy experience and enhances business outcomes. It also creates an opportunity for engagement beyond advocacy, including account nurturing—or even account based marketing.

Our Advocate Persona and Journey Mapping Service enables both organizations with existing advocacy programs and those that are just starting out to pinpoint all of their advocate personas, delineate and define a journey map with assigned goals, roles, and preferences to each critical milestone, target advocate activities and challenges to those, and develop advocate nurturing campaigns. These findings are consolidated into a customized Advocate Persona and Journey Mapping Guidebook that clients use to configure and manage their Advocacy Marketing Programs.
Advocacy Marketing (aka Customer Marketing and previously Customer References) is undergoing a dramatic shift. The level of importance buyers place on peer and influencer referrals and marketing-generated content (e.g., case studies, video testimonials, etc.) has grown substantially in recent years.

Though the numbers vary based on the research in question and the stage in the buying cycle, upwards of 60 percent of buyers rely on referrals from people they know. And for B2B marketing, research shows that 25 percent of content marketing needs to showcase customer case studies in some form. Content with customer examples is more effective, too: 30 percent based on research.

25% of content marketing needs to include customer examples in some form, which is 30% more effective than content lacking customer evidence.

**Rise of Advocacy Marketing**

The growing need for peer engagement and content in the buying cycle created a completely new marketing profession—and one that has evolved and matured significantly over the past decade. The traditional model employed by marketing to source, secure, and manage customers willing to advocate publicly on behalf of companies simply could not scale to support the burgeoning volumes requests from sales, the channel, marketing, PR and communications, among other groups.

Technology solutions such as customer reference database systems (e.g., Boulder Logic, RO|Innovation, Point of Reference) and outreach and recruitment methodologies focused on sales and partners as the serve conduit for growing the universe of advocates. Typically leveraging a combination of carrots and sticks, marketing professionals would incentivize sales to extract agreements from customers for different levels of advocacy activity on behalf of the company. But the model could not support the growing demand for advocates.
A few years ago, some marketers began to realize a different approach is needed, one that would enlarge the pool of advocates by engaging directly with them. This gave rise to solutions like Influitive and Zuberance and more recently Podium, Amplifinity, CustomerAdvocacy, Needle, among others. In varying ways, these solutions enable users to invite customers, partners, and employees into their systems and use gamification and reward points to incentivize advocacy behaviors. Some of them even employ social network monitoring to pinpoint previously unknown advocates and invite them to join their advocate programs.

Advocate personas are placed into groups and targeted with asks and challenges in exchange for reward points. In many instances, these are part of a gamification model that uses leaderboards and badges to incentivize and reward advocacy behaviors. Advocate journey maps (viz., progression) occur as a result of activities and are not aligned with customer journey maps and market segments within the customer relationship management (CRM) system.

**Persona Segmentation and Journey Mapping**

On a separate but parallel track, a transformation took place in what is often called persona (or audience) segmentation marketing. Marketers discovered the static buyer-customer personas they sketched out and placed in PowerPoint decks a decade ago were too rudimentary. Further, because they were one-dimensional, they failed to account for changing goals, preferences, and roles through the acquisition process.

Buyers are turning to peer reviews and recommendations in growing numbers before engaging suppliers. They remain important in other stages of the buyer journey as well: **83 percent** of buyers indicate case studies and testimonials play an important role in the latter stages of the funnel when evaluating and comparing different solution options.
and consumption journeys. Marketers were unable to create targeted content and activities based on buyer and customer persona experiences at specific milestones on the journey map.

In their place, a more dynamic, multidimensional model arose that relies on buyer-customer experiences to construct personas and overlay those on top of journey maps. Additional meaning is supplemented when these are examined through the lens of different market segments. This approach enables marketers to increase content quality, shorten the time required to plan and create content, drive engagement and leads from demand-generation initiatives, and shorten sales cycles.

Segmentation-Based Advocacy Marketing

Behavior-based advocacy marketing is undeniably effective and generates measurable business outcomes. The problem with this approach is that advocacy activities and challenges are not presented based on the persona of the advocate and where the advocate is in the journey continuum.

Marketing professionals concur with these findings: nearly twice as many who have developed personas and journey maps indicate they have an in-depth understanding of buyers and can target content that engages buyer needs and preferences versus those who have not done so.

However, when advocate personas and journey maps are employed, the distance between the variables

Peers and colleagues are one of the top three resources that inform buyers about a solution.

Content with customer stories and evidence are 30% more effective than other content.

25% of content marketing needs to include customer examples and evidence in some form.
shrink and advocacy activities and challenges become more precise. Knowing when and how to engage with each advocate persona personalizes the advocacy experience and enhances the business outcomes. It also creates an opportunity for engagement beyond advocacy, including account nurturing—or even account based marketing.

Ideally, advocate personas and journey maps should align to existing buyer-customer personas and journey maps and their breakdown across different market segments. Regardless, if these are lacking or legacy personas are one dimensional, advocate market segments, personas, and journey maps can still be built from the ground up in alignment with the data sets contained within the CRM system.

**Advocate Personas and Journey Mapping**

With more than 15 years of experience on advocacy marketing and having designed, built, and managed highly successful programs for startups to Fortune 100 enterprises, TIRO Communications knows how to tailor a program to meet the goals and needs of our customers. For advocacy marketing programs to truly excel and scale, they must be anchored to a solid foundation, and a core underpinning are advocate personas and journey maps.

Our Advocate Persona and Journey Mapping solution enables both organizations with existing advocacy programs and those that are just starting out to pinpoint all of their advocate

A **12%** increase in advocacy generates a twofold revenue growth rate.

Engaged customers are **52%** more valuable (revenue, marketing, etc.) than highly satisfied customers.

Though engaged customers represent just **22%** of total customers, they account for **37%** of revenue.
personas, delineate and define a journey map with assigned goals, roles, and preferences to each critical milestone, target advocate activities and challenges to those, and develop advocate nurturing campaigns.

Based on insights from interviews and surveys with customers, partners, and employees, TIRO Communications develops an Advocate Persona and Journey Mapping Guidebook that is customized and personalized for each client (see below excerpt example). The Guidebook provides detailed recommendations as to what types of advocate activities and challenges should be used for each persona type at specific journey milestones.

**End-to-End Advocacy Marketing Help**

TIRO Communications offers an end-to-end portfolio of advocacy marketing services. These include:

> Advocate Personas and Journey Mapping
> Advocacy Marketing Ecosystem SWOT Assessment
> Advocacy Marketing Program Execution

For more information on our solutions or help in building a new advocacy program, fixing one that is broken, or scaling an existing one to new heights, contact us today.

7. See the findings from a survey conducted by Akoonu and a research partner: Jeff Freund, “82% of B2B Marketers Say Buyer Personas and Journey Maps Guide Quality Content Creation,” Akoonu Blog, November 18, 2015.
Market Segments: Market Segments are defined based on various criteria such as company size, industry, geographical reach, and demographics (company culture). Advocate Personas and Journey Maps are created for each Market Segment. Typically, it is best to cap the number of Market Segments to less than 10. The final outcome of the Advocate Persona and Journey Mapping Service is a Guidebook containing Personas and Journey Maps for each Market Segment.

Fictitious Market Segment: The following is a fictitious Market Segment for a company—ACME—that provides a SaaS-based B2B project management software solution used by organizations to manage the on-boarding process for new clients. The company serves various industries including consulting, accounting, hi-tech, construction, energy, among others. The below is for a hi-tech software company and assumes a Mid-Market account target.

Advocate Personas
Advocate Personas are representations of the different stakeholders involved with selecting, implementing, managing, and evolving the solution. Additional personas such as the CSO would be included in a complete personal and journey mapping model.

Advocate Journey Stages
The Advocate Journey Map starts with the Evaluation Stage at the bottom of the Acquisition Funnel and proceeds through the end of the Consumption Funnel.

Needs: What the Advocate needs to be successful.
Role: Roles the Advocate plays in each journey stage.
Preferences: Types of content and communications and when the Advocate would like to receive it.

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<tr>
<th>Stage</th>
<th>Driver (directs the process)</th>
<th>Approver</th>
<th>Contributor</th>
<th>Informed/Not Involved</th>
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<tbody>
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<td>Purchasing</td>
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Potential Roles Played by Advocate Personas at Each Journey Stage: