

# THE CUSTOMER MARKETING PLAYBOOK

Activating Your Greatest  
Growth Engine in B2B



ANGELA TROCCOLI  
MARKETING STRATEGY

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# Why Customer Marketing Is Your New Growth Engine

The companies winning today are customer-led, not product-first.

Customer Marketing has become the gravitational force that unites your product, go-to-market, and customer experience strategies. It's no longer a "nice-to-have" — it's the new center of business gravity. Why? Because customers don't just influence growth — they are growth.

It's time to flip the script: From product-led to customer-led. From loud launches to long-term loyalty. From assumptions to advocacy. Customer Marketing creates a connected customer experience that turns real-world outcomes into compelling stories, scalable proof, and trusted influence.

When you build around your customers, growth becomes more sustainable, authentic, and cost-efficient.

Whether you're new to Customer Marketing or looking to scale the function at your organization, this playbook will help you:

- Position Customer Marketing as a strategic growth engine across your organization
- Build lifecycle programs that turn customers into loyal advocates
- Scale customer storytelling to influence pipeline, retention, and expansion
- Drive adoption, engagement, and referenceability with intent and structure
- Operationalize advocacy through systems, metrics, and cross-functional alignment
- Measure and prove the revenue impact of customer-led marketing





# Purpose-Driven, Customer-Obsessed

Advocacy isn't accidental. It's built on intention.

Our mission is to unlock and amplify the power of our customers. When we help customers succeed, and give them a platform to shine, they become our most credible sellers, influencers, and product validators.

Customer Marketing sits at the intersection of value realization and brand affinity. We don't just track adoption — we celebrate outcomes. We don't just ask for quotes — we build relationships. Every campaign, story, or webinar we co-create with a customer builds trust and momentum.

Mission	Description	Key Impact
Drive Product Adoption & Engagement	Equip customers with the education, tools, and support needed to realize value quickly and consistently deepen product usage.	Accelerates time-to-value, boosts retention, and expands product stickiness.
Enable Referenceability via Success Stories	Identify and activate customers with proven outcomes to share their experiences through compelling content and advocacy activities.	Increases trust with prospects, supports Sales with social proof, and fuels content strategy.
Celebrate Customer Achievements	Spotlight customer wins across channels, events, and platforms to build loyalty, inspire peers, and reinforce mutual success.	Strengthens relationships, increases satisfaction, and reinforces long-term loyalty.
Grow & Scale Advocacy	Build structured programs that nurture customers into advocates, create repeatable engagement paths, and amplify their voice across touchpoints.	Expands influence, drives pipeline and campaign lift, and turns customer success into scalable growth.

# Mapping the Modern Customer Journey

Customer Marketing is a lifecycle — not a one-off touchpoint

Our work doesn't begin at onboarding and end with a case study. We architect programs that follow the customer journey in full — from presale alignment through go-live, through value realization, expansion, and beyond.

We identify advocacy opportunities early, often, and in alignment with success milestones. The journey is coordinated with Sales, Customer Success, and Marketing — but Customer Marketing owns the narrative of progress.

## Key Journey Stages



### Closed-Won

Advocacy opt-in, early reference planning, welcome experience, win announcements, internal socialization.



### Go-Live

Onboarding enablement, early storytelling, milestone recognition.



### Year 1+

Story development, customer spotlights, expansion prep plus including in strategic GTM and events.



### Churn

Lessons captured, voice honored, including feedback to Sales, Marketing and Product Teams.



# Advocacy in Action: What We Ask, How We Amplify

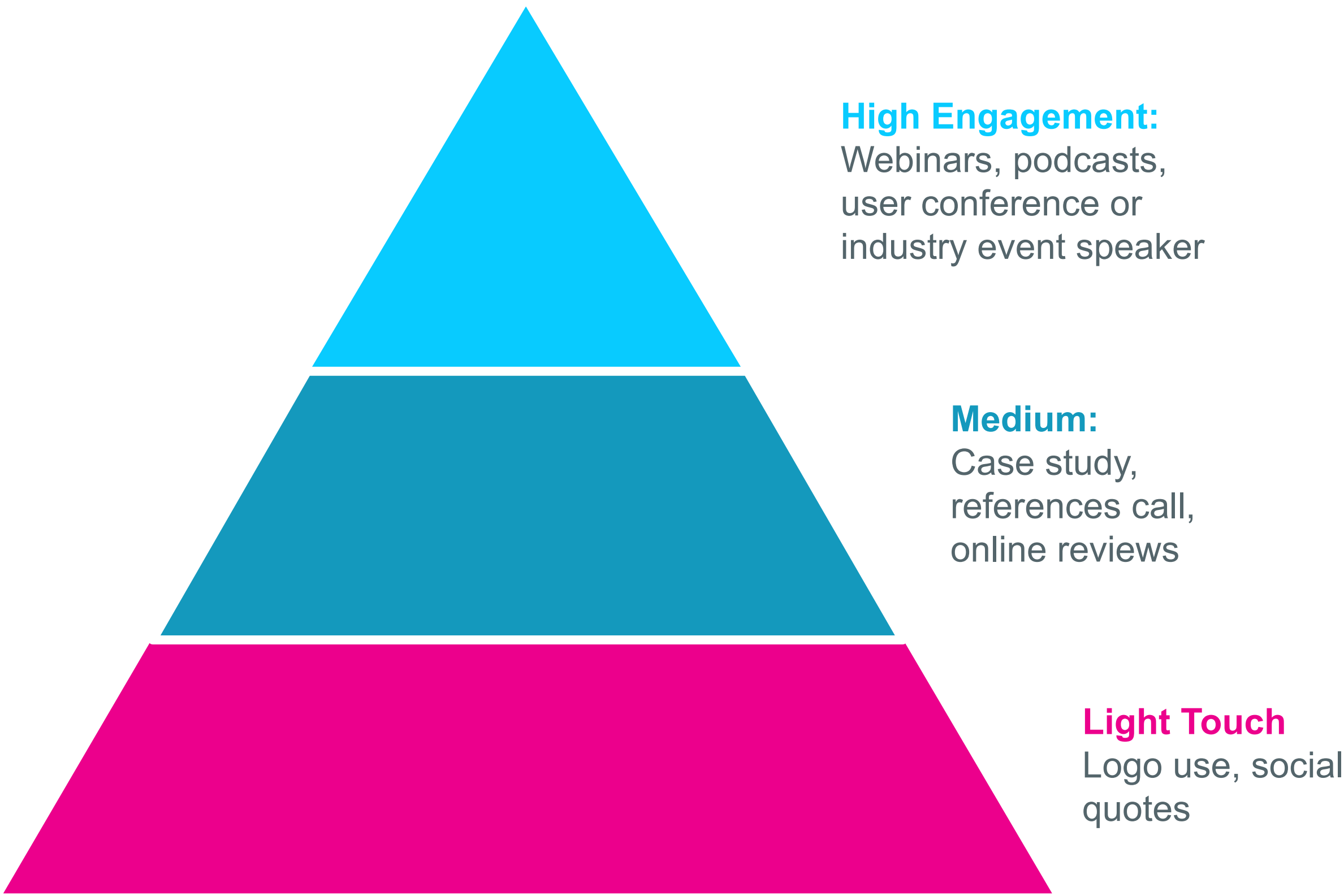
A high-impact advocacy engine is built on clear asks and mutual value.

We tap into the voice of our customers to inspire prospects, influence peers, and validate product evolution. But advocacy must be structured, respectful, and repeatable.

We make it easy for customers to participate at their preferred level — from a logo on a slide to speaking at a major conference. Every ask is mapped to value for them, visibility for us, and credibility for the market.

Advocacy formats include:

- Quotes and logos
- Case studies and customer stories
- Analyst reviews (e.g. G2, Gartner Peer Insights)
- Reference calls
- Webinars, podcasts, video interviews
- Speaking at events or joining CABs



# What We Give Back to Make Champions Shine

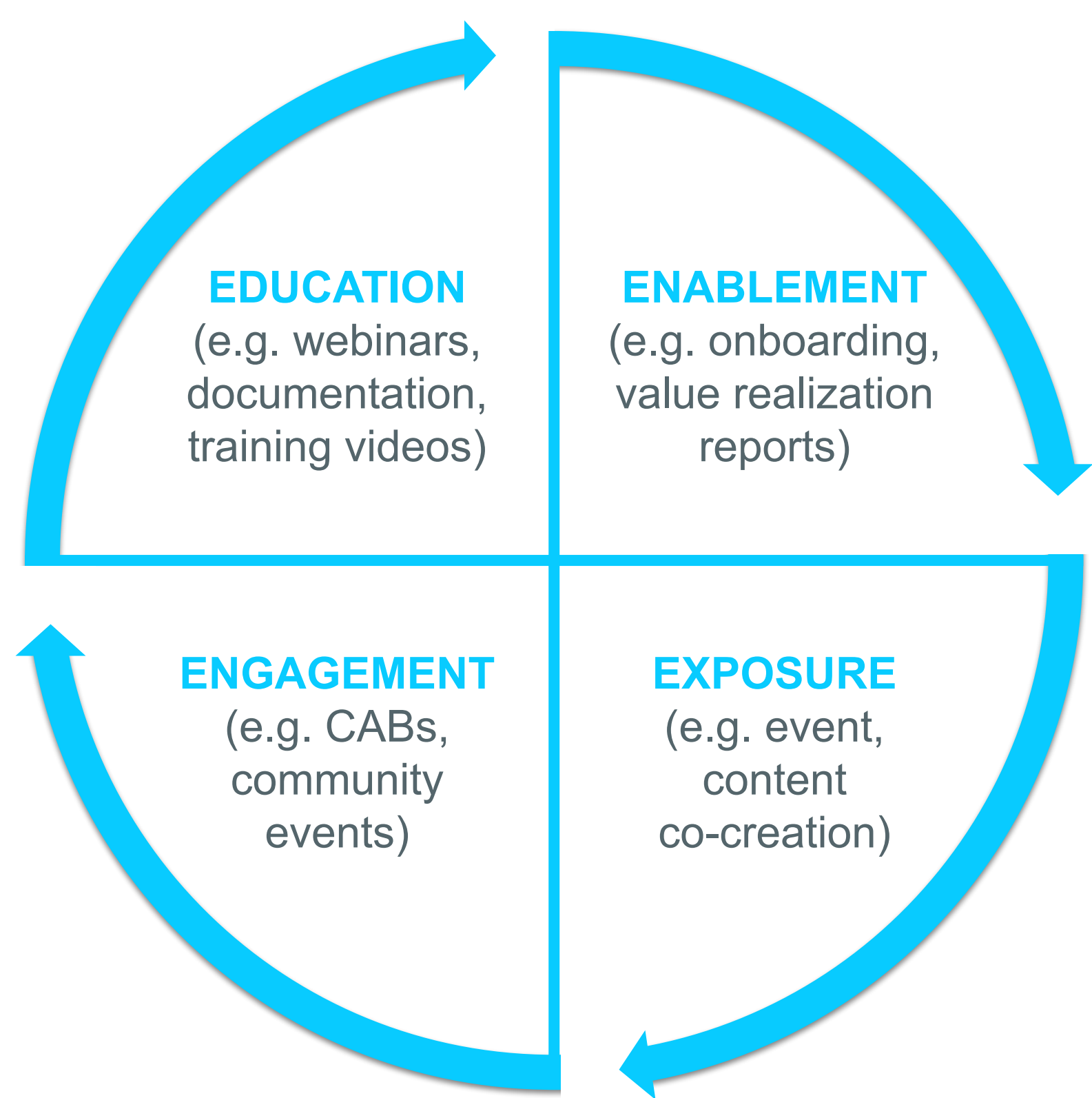
Advocacy is earned. We give before we ask.

Great customer marketing puts just as much emphasis on enablement and recognition as it does on asset creation.

We support our customers with valuable content, personalized onboarding, peer engagement opportunities, and channels to tell their stories. When customers feel successful and seen, advocacy flows naturally.

How we invest in customers:

- Custom onboarding toolkits and playbooks
- Success webinars and value realization reports
- Community platforms and customer spotlights
- Beta and early access opportunities
- Executive visibility and speaking platforms





# One Size Doesn't Fit All: How to Win Over Everyone

Different personas need different approaches — and value

Customer Marketing isn't one-size-fits-all. Different customer roles have different goals, motivations, and preferences — and we must meet them where they are.

Developers want technical depth, early access, and autonomy. Business users seek use cases, ROI, and measurable outcomes. Executives want to hear about strategy, risk mitigation, and business growth.

By creating segmented tracks and content that speaks to their unique needs, we foster trust and drive adoption across the full spectrum of the customer organization.

Focus Areas	Key Activities	Outcomes
Developer	API docs, sandbox, changelogs, peer forums	Hackathons, bounty programs, developer newsletter, community Q&A
Business User	Use cases, workflows, onboarding, value realization	Success webinars, playbooks, 1:1 onboarding
Executive	Strategic outcomes, case studies, ROI	Customer councils, peer roundtables, impact stories

**Pro Tip:** Whether it's hosting a technical hackathon, producing a business outcome spotlight, or organizing an executive roundtable, we design programs that resonate with each persona — while still reinforcing a unified brand experience.



# From First Use to Fan Favorite: Driving Toward Advocacy

You can't scale referenceability and advocacy without adoption and success.

Referenceable customers don't come out of nowhere — they emerge from great onboarding, clear wins, and visible value.

That's why adoption is at the core of our advocacy strategy. We monitor product usage, time-to-value, and success milestones to identify when a customer is ready to share their story.

Our approach is data-informed and relationship-led. We don't wait for customers to raise their hand — we guide them there. The top 4 signals for referenceability are:

- 1. Specific usage milestones hit
- 2. Target business outcomes achieved
- 3. Strong Customer Success relationship exists
- 4. Strategic alignment or account expansion underway

## Navigating the customer advocacy journey



# The Advocacy Map: Your Blueprint to Scale Evangelism

Advocacy isn’t luck — it’s mapped, measured, and maintained.

An Advocacy Map helps us track which customers are ready, active, or evolving as advocates. It ensures we’re building a pipeline of customer voices without overusing our top champions.

It also helps us match the right ask with the right persona at the right time — making advocacy feel natural, relevant, and rewarding.

Tier	Key Activities	Profile
Emerging	Logo, quote, survey	Early adopter starting to realize value
Active	Case study, webinar, online review	Mid-lifecycle seeing business outcomes
Evangelist	CAB, keynote, product advisory	Strategic customer achieving long-term growth & expansion

### How we use it:

- Track advocacy engagement by tier, role, region, or use case
- Identify advocacy gaps by vertical or segment
- Build advocacy “paths” to deepen engagement
- Surface new voices proactively



# Stronger Together: Product + Customer Marketing

When product messaging reflect real outcomes, everyone wins.

Customer Marketing and Product Marketing must operate as a unified front — because customers don’t buy features, they buy results. While Product Marketing focuses on positioning the product to the market, Customer Marketing ensures that messaging also reflects the lived experience of those already using it.

Product messaging that ignores existing customers risks confusion, misalignment, and even churn. The best messaging doesn’t just launch something new — it honors what came before. It highlights progress, not just change. It reinforces that customers made the right decision to buy and stay. When we develop positioning that reflects both innovation and outcomes, it builds trust, pride, and continuity.

## Connecting ‘Why it matters’ to ‘What’s new’



### Launches

Includes customer proof and voice-of-customer language, with both prospect and customer angles



### Messaging

Links “what’s new” to “what’s working”, highlighting product maturity, not just ‘newness’



### Storytelling

Connects roadmap to real-world results, with case studies updated alongside product evolution



### Roadmap

Grounded in the needs of the customer and the new requirements from the market, so existing users aren't left behind

**Bottom Line:** We ground launches in lived experience, not just product capabilities — making change feel like progress, not disruption.



# From Insight to Innovation: Partnering With Product

Turning the Voice of the Customer into a strategic roadmap advantage.

Customer Marketing plays a critical role in surfacing and amplifying the Voice of the Customer (VoC) — not only to drive engagement, but to inform product strategy. By identifying advocates and success stories, Customer Marketing captures frontline insights that help Product Management build with confidence, validate direction, and show real-world impact.

In return, Product teams gain access to a pool of experienced, engaged customers who can act as beta testers, advisors, and public champions for upcoming releases. When this partnership works, the result is a tighter feedback loop, more relevant roadmaps, and launches backed by proof — not assumptions.

Focus Areas	Customer Marketing	Product Management
Voice of Customer	Captures and curates stories, quotes, feedback	Analyzes feedback to inform roadmap
Advocacy	Identifies and nurtures champions	Engages champions in roadmap validation
Product Launches	Sources proof and early wins	Delivers features with measurable outcomes
Advisory Boards	Recruits and manages member experience	Shares vision and gathers strategic input

## How the partnership works:

- **We bring feedback** from advocacy calls, CABs, case studies, and surveys
- **We spotlight** gaps, frictions, and “customer love” features
- **We connect** Product Managers to advocates for roadmap validation
- **We turn launches into success stories** by matching them with proof



# Campaigns With Credibility: Customers as the Star

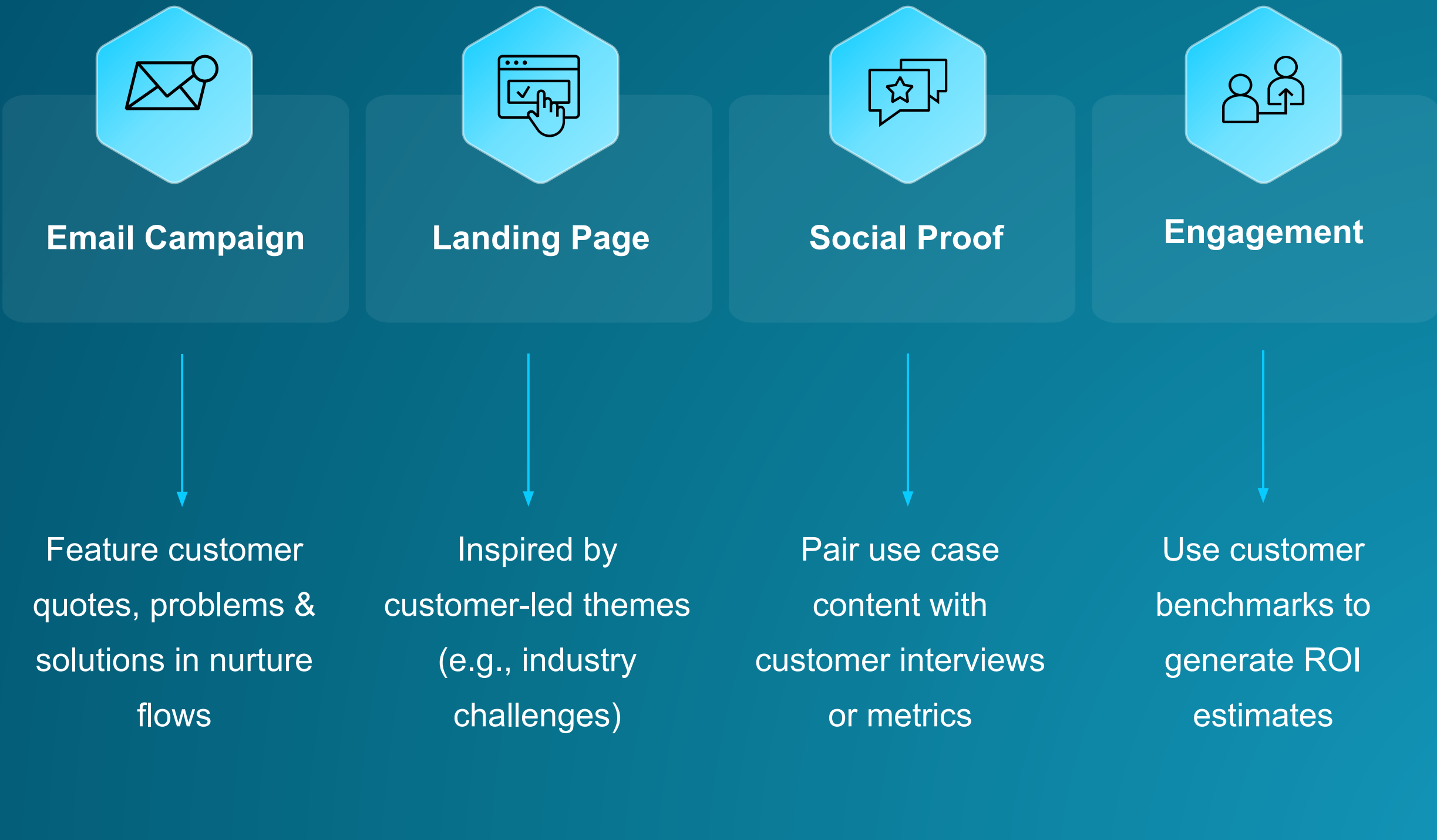
Let your best marketing be the customers who’ve lived the results.

Customer Marketing is a key driver of content and campaign success — not just a contributor. The most impactful marketing doesn’t talk about customers; it talks with them and showcases their success. By aligning with content and demand gen teams, Customer Marketing fuels campaigns with authentic stories, real-world proof, and voice-of-customer insights that drive relevance and results.

In upsell and cross-sell campaigns, this alignment is especially powerful. A customer testimonial about how Product A helped solve a key challenge can open the door for Product B, making the next step feel inevitable instead of intrusive.

Campaigns that feature peer proof, joint value stories, and customer outcomes are more trusted, more engaging, and more likely to convert. Strategic alignment or account expansion underway

## Make the customer story your through line



# Operationalizing Customer-Centric Campaigns

Campaigns powered by advocacy need structure, not improvisation.

To consistently deliver campaigns that center the customer, we need more than good intentions — we need systems. Operationalizing the intersection of Customer Marketing, Content, and Campaign Strategy ensures that customers are embedded into planning, storytelling, and execution.

What makes it work:

## Quarterly Content & Campaign Planning Syncs

Identify upcoming themes, product launches, and customer story alignment.

## Shared Advocacy Brief Template

Ensure every campaign brief includes space for proposed customer quotes, case studies, and referenceable names.

## Campaign Asset Tracker

Maintain a centralized log of customer references, status (approved/pending), and usage limits

## Cross-Team Slack Channel

Use for real-time advocacy requests, campaign launches, and win sharing.

## Tagging System in Enablement Platforms

Organize content by persona, use case, and lifecycle stage, leveraging shared learning management or enablement platforms, like Highspot.

When we treat customer voices like strategic assets — not lucky wins — they show up everywhere: faster, fresher, and more aligned with business goals.



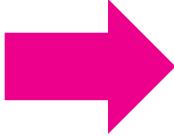
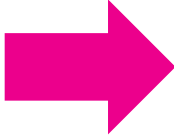
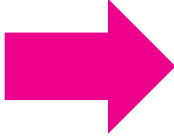
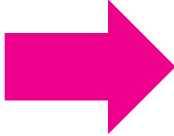
# Proof Over Promises: The Metrics That Actually Matter

If you can't measure it, you can't scale it.

The impact of Customer Marketing isn't soft. It's deeply measurable. From shortening deal cycles to influencing pipeline and reducing churn, customer stories and programs deliver quantifiable business value.

We don't just measure volume of content. We measure performance and influence over the following success factors:

- % of referenceable customers
- % of active advocates by tier or persona
- Content engagement and usage (by sales or CS)
- Campaign lift with vs. without advocacy assets
- Expansion or renewal success after value realization reporting

Key Metric		What It Tells Us
Advocacy-Involved Pipeline		Proof of influence on revenue, including expansion or renewal success
Time-to-First Advocacy		Health of post-sale experience
Campaign Lift (with proof)		Impact on engagement and conversion
Content Usage Rate		Internal adoption and enablement ROI

**The takeaway:** High-performing Customer Marketing teams don't run on gut instinct. They run on process. We use templates, shared tools, tagging systems, and communication rhythms to build predictable pipelines of customer proof and advocacy opportunities.

# Behind the Scenes: The Ops That Make Advocacy Scalable

Without systems, Customer Marketing becomes guesswork.

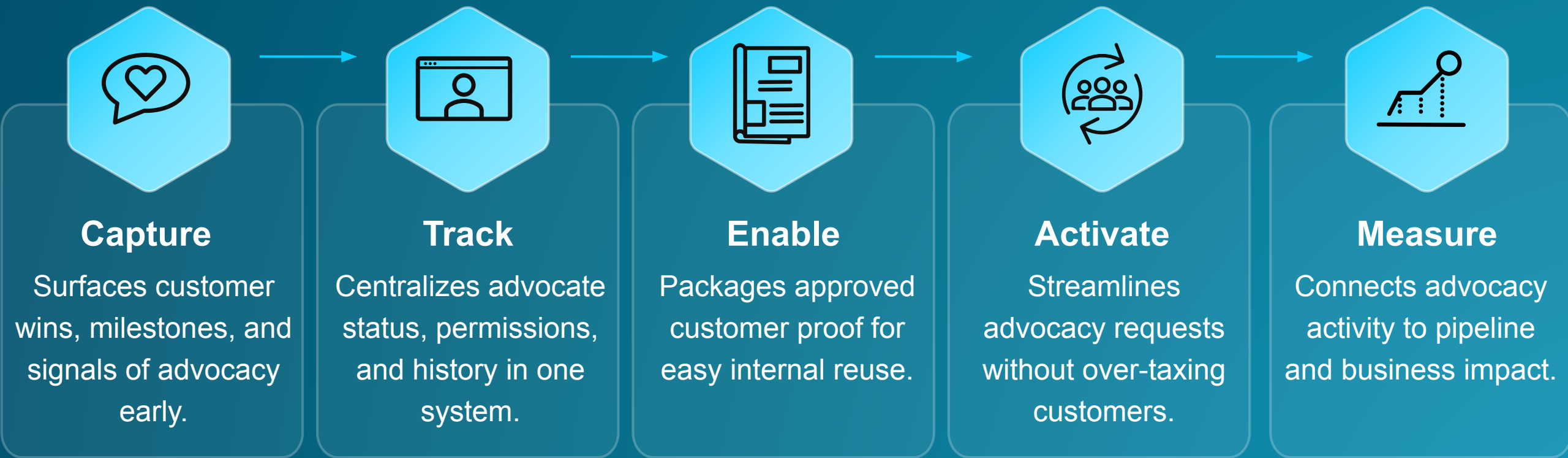
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## What's in our operational toolkit:

- Internal announcement templates (e.g., for wins or go-lives)
- Reference management tracker (e.g., in Salesforce or Airtable)
- Shared request forms for speaking/story/quote use
- Onboarding checklist for identifying advocates early
- Enablement content hubs (e.g., Highspot, Confluence)

## Customer Marketing Operations Framework





# Make Customer Marketing Everyone's Business

Advocacy is a shared mindset, not a single function.

Customer Marketing may own the programs, but everyone owns the experience. The strongest companies embed advocacy into product planning, marketing campaigns, and sales enablement from the start. They make customer success a team sport.

Our job is to lead that shift — to show what's possible when every team thinks: "How can we celebrate this customer? How can we amplify their voice?"

## Transforming satisfied customers into strategic growth drivers

### Drives Revenue

Customer stories and advocacy programs accelerate upsell and cross-sell, influence pipeline, and improve win rates.

### Improves Retention & Account Expansion

Engaged, educated customers are more likely to renew and expand as your portfolio of products and solutions grows.

### Reduces Customer Acquisition Cost

Peer-to-peer proof builds trust, shortens deal cycles, and lowers acquisition costs.

### Enhances Product Adoption & Insights

Customers that realize value become advocates and influencers. They also help to inform product strategy and innovation.



# Helping Marketers and Founders Scale Smarter



## About Angela Troccoli

Angela Troccoli is a global marketing executive and go-to-market leader with deep expertise in product marketing and startup growth strategy. She has built and scaled marketing functions across industries and is known for helping organizations evolve from scrappy startup operations to mature, revenue-driving machines. Angela brings a pragmatic yet visionary perspective on aligning marketing with business outcomes, particularly as AI continues to redefine the role of modern marketers.

