

A REPORT ON CUSTOMER REFERENCE FORUM 2008

Customer Reference Forum® 2008 took place at the Claremont Resort & Spa in Berkeley, California, from February 18 to 20. Close to 150 reference professionals participated, exchanging insight and building relationships.



"This was a very useful, focused event and well worth the time spent."

Merv Adrian
Senior Vice President
Forrester Research

This document, created by Washburn Communication for the Customer Reference Forum, provides summaries of the keynote address, presentations, panel, and breakout sessions.

"It was a terrific conference! I look forward to attending it again."

Mary Olian
Customer Marketing Manager
IBM Information Management

"I think this year was the best. I really enjoyed the format and best practices shared. Great networking as well."

Lara McGurk
Program Manager
Sun Microsystems

"As a first time attendee, the conference was very helpful. My colleague and I made several contacts that will help us, and we look forward to implementing a few ideas we picked up!"

Kristen Martin
Manager, Marketing Programs
Blackbaud, Inc.

"The interaction and enthusiasm was contagious. Everyone was very open and willing to help each other and share knowledge."

Elana Price
Reference Program Manager
EMC

Prepared by:



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Case Study on Metrics: How Intel's Reference Program Gained a Seat at Sales and Marketing's Executive Table

Rhett Livengood, Chief Reference Officer, Intel Corporation

President's Award Winner for Best Presentation



As Director of Worldwide Sales Development Chief Reference Officer for Intel® Solution Services, Livengood is responsible for sales development activities with Intel's Influencer sales team, targeting Global 2000 enterprises worldwide. He also is Intel's Chief Reference Officer, managing a worldwide Customer Advocacy Program, including Intel's Enterprise and System Integrator Board of Advisors, analyst and press relations, and outbound and inbound sales development activities for Intel's enterprise products, platforms, and services. During his 27 years in the IT industry, Livengood has managed the Americas geography and worldwide marketing for Intel Solution Services and served as the worldwide Marketing Manager of the Intel® Solution Centers and Services Division in the Architecture Solutions Enabling Group. He was also Worldwide Marketing Manager for the Intel Architecture Content Group and Product Marketing Manager of Intel's Mobile Computing Group, and he held marketing and engineering positions in Intel's memory, processor, and platform divisions.

The Intel sales team engages with more than 400,000 resellers, consumers, small and medium-size businesses and enterprise companies. Supporting the Intel field that focuses on business, Intel's customer reference program targets trendsetter businesses and tells the stories of how they solved their most difficult business problems using Intel technology.

To make sure they understand their constituents' needs and boost service levels, Livengood's team members perform a thorough biannual survey directed at Intel's sales and marketing departments. Pointing out best practices in survey management, Livengood made several recommendations:

- Surveys should assess all sales tools and collateral, not just references.
- A sales executive should send or sponsor the survey to ensure better response rates.
- A combination of closed and open-ended questions is most productive.
- Reference managers should use the survey to identify key action items and communicate those to the field, along with their plans for working on them.
- Survey results should be available to product and services marketing teams.
- Meetings with the field help to obtain direct feedback and build reference support from the sales team; the Intel reference managers meet with close to 20 sales districts every quarter.

Livengood shared many of the detailed, in-depth questions and results from a recent sales survey. "End user sales studies" ranked as number four in value among 14 different marketing collateral items. Partly in response to the survey, Intel stopped producing expensive reference videos, which garnered minimal awareness among sales. Instead, the reference program now provides YouTube-style videos, which take much less effort and funding to create, and which can represent a customer's statement with great authenticity. Intel's reference program also offers concise audio references, which are cost effective to produce, easy to download and consume, and increasingly popular.



"Many salespeople are really asking for a 'knowledge butler,'" Livengood said. To help sales teams catch up on new reference and marketing collateral, Intel produces and distributes CDs that representatives can review at their convenience, even offline. Intel's surveys and research found that the company's most winning sales representatives use the broadest variety of reference and sales tools, whereas less successful representatives make use of fewer tools, or none at all.

At Intel, sales account planning includes marketing and reference considerations. Livengood showed the audience sales planning and forecasting tools that list proposed case studies and other reference activity; these help generate and track marketing agreements with customers. In setting and following through on sales goals, Intel maps customer reference metrics into overall sales metrics, and reference and marketing targets figure into representatives' commissions. Livengood shared forms and tables used to calculate sales goals and commissions.



Intel frequently engages in joint campaigns with companies, such as Dell and Hewlett-Packard, to develop new references. Livengood showed an extremely well-received video used by Intel representatives to remind customers of the advantages of being a reference for Intel—an innovative, leading technology company that creates its own markets. Intel customer programs that complement reference activities include a board of advisors and a customer advocacy program. The company does not incentivize reference customers.

Livengood suggested several metrics for evaluating the success of reference programs. For sales, these included the length of time to close deals, the number of bookings won, amount of billings generated, the number of platform adoptions and technology transitions, and the number of global accounts won. For marketing, he proposed using the number of different types of references, the number of case studies and other collateral available, growth in online customer community reference content, reference quality, and the number of press and analyst references.

In summing up his fascinating presentation, Livengood emphasized the value of generating regular surveys, mapping reference metrics to those used in sales and marketing, and incorporating reference metrics directly into sales quota. He also reiterated that pilot programs should precede wider implementations and companies should take the time to customize reference programs for each geographical region. "Visit with sales regularly," he said. "And provide only what your internal and external customers want. Don't be afraid to stop delivering something that is no longer valuable."