Six Steps for Building a Thriving Success-Story Program

A Guide for Communicating How Your Business Helps Customers

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The Importance and the Challenge of Writing Customer Success Stories

Everyone loves a story. Stories keep the audience tuned-in as they come to understand the before-and-after as well as the beginning, the middle and the end, which is why it makes sense for businesses to tell stories about how their products and services help their customers. Stories also present a much more compelling viewpoint than press releases, brochures, sales slicks, Web text and other marketing collateral.

But developing and maintaining a successful customer success-story program presents a constant challenge. Sales teams need a variety of stories they can turn to for varying prospects. The ideal is to have at least one success story for each product and service as well as for each industry vertical. It might also make sense to create success stories for different size customers and perhaps customers in different geographies. The greater the variety, the more flexibility the program gives the sales staff when trying to close on a particular prospect.

It's also important to provide the sales team with success stories that are fresh. If a sales rep refers a prospect to a great success story that took place two years ago, the prospect's next question will likely be "what have you done lately?" It's not enough to just develop a set of success stories and then sit back. New ones must be developed on a regular basis. Ideally, the sales team should be able to reference stories no more than one-year-old, and preferably less than six-months-old.

As you begin to develop your company's success-story program, it's important to work closely with the sales team so they understand the value of developing success stories and so they understand how much you will need their help. As the personnel within your company that most likely have the strongest relationship with your customers, it's critical that the sales team actively seeks success-story candidates and steps in to help with the approval process. Finding candidates and then managing the customer approval process will take diligent project management. The more the sales team assists with these tasks, the greater your chances of success.

Convincing the sales team to work with you can be challenging as they are usually focused on selling and may not want to spend time working with existing customers to generate success stories. The key is to convince them how much easier their jobs will be if they have compelling and current success stories to present to customers. If the sales staff does not present a sufficient set of customers to pursue for success stories, it may be necessary to work through the service department, particularly those that work regularly with customers.

Step One— Identify Success-Story Candidates

The first step in developing a success-story program is to identify which customers you want to approach for permission to write a story on

how they benefitted from using your product or service. Here's a checklist of criteria to consider:

- Is the customer's company name recognizable to your prospects?

- Does the customer use one of your leading products or services?

- Does the customer use a newer product or service for which you are trying to grow market share?

- Does the customer offer a story that features something you did unusually well or that presented particularly difficult circumstances you were able to overcome?

It's particularly effective to work with customers that put your business through a rigorous test against your competitors before choosing your product or service. These customers can talk specifically about what set you apart during the selection process.

In some cases, finding a customer that will agree to appear in a success story will be a challenge. You may need to defer to a customer that does not possess any of the above attributes but is simply willing to let you write a success story. You may be able to convince customers by offering a discount to those that will participate in a success story, or you could offer a gift certificate to the customer representative you interview and who will approve the success story. But the best success stories tend to come from customers with which your company has developed such a strong relationship that they are glad to do the favor for you without expecting anything in return.

Strive to work with customers willing to have their name appear publicly in print, but in rare cases you might consider writing a success story in which the customer is not identified other than in generic terms. You need to be careful you do not give out the customer's name publicly, but you can still have your sales staff confidentially let prospects know verbally or within an e-mail

who the success story pertains to. This is not as effective as a success story in which the customer is named and a spokesperson is quoted, but at least you have a story.

When working with the sales team to identify success-story candidates, try to identify three customers for every success story you hope to produce. You may run into customers that decline, and among those that say yes at first, you may run into a road block down the road if the customer experiences problems with your products or services. It's good to have more candidates you can turn to, just in case the first option does not pan out.

You may also find that even though your primary customer contact agreed to the success story, the customer's corporate communications department or a senior manager might object. Before you proceed to interviewing the customer and writing the success story, it's important to confirm with your primary contact whether anyone else within their company needs to give permission.

Step 2—Conduct Internal and Customer Interviews

Once you have identified all of your success-story customer targets and have received permission to contact them, it's time to turn the project over to your assigned writer. Typically, the writer will first interview the internal person from your company who knows the most about the deployed solution. This may be a sales rep, but it could also be a project manager or a systems engineer.

The writer will need to get an understanding of what the solution entailed and whether there's anything unusual about the solution that should be highlighted. It's also important to tell the writer why the success story is important from a marketing perspective so that he/she emphasizes the main points that will allow the success story to have the maximum impact on prospects.

The next step is to interview the customer. The

customer's primary contact should first get permission and let them know that the phone call interview will last between 30 and 60 minutes. It's a good idea for the writer to record the phone call so that specific comments and technical terms can be verified. You may also want to consider hiring a transcription service to document the call in case there are specific points the writer might miss.

Below is a general set of questions to ask, but the writer should be ready to deviate from the list when more details are needed or if the customer reveals something that warrants additional questions.

- What was the business challenge before deploying the solution?

- How did you hear about the solution provider as a possible answer to the challenge?

- Why did you choose this solution provider?

- What alternatives did you consider?

- What was the solution they designed for you?

- How did the deployment go?

- Did the solution provider overcome any unusual road blocks technologically or logistically?

- Did the solution provider demonstrate any particularly valuable skills?

- How does working with the solution provider compare to other solution providers you have worked with?

- What were the results of the deployment?

- What benefits have you received technologically and for the business?

- If possible, describe the ROI with measurable results and/or numerical estimates of revenue generation, cost savings or performance improvement.

A key element of the process is choosing the person to interview and quote in the success story. Generally, it's best to match the

interviewee to your key prospects' job titles. The higher up on your customer's org chart the better, but it may not be feasible to interview the president, CEO, CFO or a senior manager. You may have to interview the project manager or the person that manages your relationship.

You may end up interviewing two people or even a team. These interviews can be tricky to manage, so it's usually best to interview just one person, but sometimes the customer will feel more comfortable with more than one person on the call. When it comes to quotes in the success story, it's also easier on your readers if just one person is quoted. But in some cases, you may feel compelled to quote two people so that they both feel part of the process.

To supplement the interviews, it's also helpful to provide the writer with any content that provides background on the solution. This can include the proposal as well a list of hardware and software components deployed. It's also helpful to provide a presentation if the sales team has already developed one that highlights the solution. If the solution was submitted for an award, the submission content can be helpful as well.

Step 3—Write the First Draft

After the interview, the writer will create the first draft. Success stories come in a variety of formats and lengths, and you might find it helpful to look at styles used by other companies to choose a style that fits your company's personality. Success stories can be as short as 250 words or as long as 2000 words, but most fall in the range of 750 to 1500 words and use some or all of these primary section headings:

- Customer Background

- Business Challenge Faced Before Deploying the Solution

- Why the Customer Chose Your Product/ Solution Rather Than the Alternatives

- Overview of the Solution Deployed

- Overview of How the Deployment Went

- Results and Benefits of the Deployment

- Call-Out Quotes

- Summary/Overview

Customer Background: This information can usually be collected from the customer's website, but it's important to rewrite and condense the information so you don't include too much content before presenting the meat of your story. It's also helpful to identify the customer by industry and size so that your sales team will know when to use this success story and so viable prospects will identify with the customer.

Business Challenge Faced Before Deploying The Solution: This section delves into how the customer experienced specific pains/challenges and/or what opportunities they missed before deploying your solution. This section can present a challenge in that you want to be careful you don't point out something that the customer may not be proud of. It could be that the existence of a problem will make the customer seem like they weren't doing their jobs in the first place. A key element to this section is also the timing of when the customer chose to address the challenge or problem. If you can find out why they addressed the challenge at this particular time rather than a year earlier or six months later, you may find a key business pain point that will resonate with prospects. There is often a pressing business problem behind the obvious technical problem that prompts end-users to deploy new technology solutions. It's important to bring out both the business problem and the technical problem.

Why They Chose Your Solution Rather Than Other Alternatives: The alternatives to your solution may involve competitors or your customer's internal resources. Competitors are generally not mentioned within customer success stories, but if you want to emphasize the fact that the customer chose your company rather than a competitor, and if the customer is willing to

let you state this, you can include references to your competitors. If you take this approach, be prepared to receive a call from your competitor. In the end, the main point to emphasize in this section is why your customer chose your company to handle the deployment rather than one of the other alternatives. This can be done effectively without naming the alternatives, and you can let your sales staff know who the competitors were just in case it becomes feasible to mention the competition during a sales call.

An Overview of the Solution Deployed: This section provides a rundown of all the components included in the solution including the quantity of each component, whether components were deployed in multiple locations, and whether you worked with internal customer personnel and/or other partners, which shows how well you can collaborate.

An Overview of How the Deployment Went: This section includes a description of the deployment and what you did to ensure a smooth deployment. You might also include the length of time the deployment lasted if the timeline is impressive; whether or not you overcame any unusual technical or logistical challenges; and whether you managed the deployment so that it did not force the customer to endure any impairments to business operations. For example, if your staff worked nights or weekends instead of during business hours, this would be a point to emphasize.

Results and Benefits: This section is the most critical to the success story, and many readers will skim over the story until they get to this section. When interviewing the customer, ask questions that prompt your customer to go beyond merely stating, "Things are better." Ask if they have specific numeric measurements that show how revenues have increased, how costs have decreased, or how efficiencies have improved—either in part or wholly because of your solution. If specific numbers are not available, ask if they can provide percentage

estimates. It might also help if the customer provides an anecdote that illustrates how "things are better" now compared to before the solution. If you still run into roadblocks in getting sufficient content for results and benefits, ask the interviewee how they would justify the cost of the solution to their boss. The answer to this question often provides the key benefits of the overall solution.

Call Out Quotes: It can be helpful to pull out one to three quotes—depending on how much space your success-story template allows—and place them in the margin, at the top of the success story, or at the bottom of the success story. Use the quotes that will grab the most attention from your prospects.

Summary/Overview: This section can include a one-paragraph overview as well as bullet-point listings that quickly describe the customer and the benefits they received. It will be of interest to your prospects to provide information such as number of employees, industry, location, solution components deployed, and date of deployment. You might choose to remove the date of deployment if you are concerned that you won't be able to generate new success stories at a sufficient rate.

Section Selections and Headlines: Depending on how much space your success-story format allows, you may or may not use all of the sections listed above, and you may choose to merge them into fewer sections. Some businesses choose to use the headings as headlines for each section while some might use other language that relies on a catchy phrase but still conveys the meaning of the heading. Here are a few examples:

> **Business Challenge** might be written as **Poor Network Performance Causes Customer Service to Suffer.**

> **Why the Customer Chose Your Company** might be written as **ABC Opts For High Level of Expertise Offered by XYZ.**

Solution Overview could be written as **XYZ Deploys Microsoft Exchange at Four ABC Locations.**

Results could be written as **Customer Satisfaction Improves 45%.**

Step 4—Secure Internal and External Approvals

After the first draft of the success story is written, it should go through internal approvals. If more than one person needs to approve the success story, it should be done by one person at a time rather than simultaneously. This will avoid changes that might conflict with each other, but it also requires a careful selection of the order in which each reviewer should edit the success story. Generally, it makes sense to start with the person who knows the most about the solution and then finish with the person on the approval team that is most senior on the org chart and will mainly be concerned with the overall message rather than the details.

Once all internal approvers have reviewed the success story and all edits have been applied, a proof-reader should check the document for errors before sending the success story to the customer. When sending the draft to the customer for review, encourage the customer to apply edits using the editing tracker feature so that all changes can be reviewed. More than likely, you will not refuse to change anything the customer requests, but it can be helpful to see the changes just in case there was a misunderstanding and in case changes negatively impact key messaging.

If the success story is well written, the customer will probably request only minor changes. If there is a major issue, you may need to schedule a follow-up phone call to discuss whether a major overhaul is needed. As with the internal review process, encourage the customer to have one person at a time review the document so that changes by multiple approvers don't conflict with each other.

Step 5—Publish the Success Story

Once the customer approves, you are ready to publish the document on your website and/or in hard-copy format. Review the success story one more time for errors before final posting and printing. Any minor changes don't necessarily have to be approved by the customer, but if you come across anything major, it's best to check with the customer one more time.

Some companies ask their customers to sign-off on a form giving permission to publish the success story, but in most cases, an e-mail granting consent generally suffices. The key is to be clear about how you plan to use the success story and where you will publish it. If problems ensue after publication, it's generally just a matter of taking the success story off your website and ceasing distribution to satisfy the customer's requirements.

It's also important to create a success-story section on your Web site that's easily accessible from the home page. Try to make it easy for visitors to cross-reference success stories according to industry, company size, customer name and/or type of solution. The key is to help prospects easily find success stories that match their situation.

In addition to publishing the success story on your website, proactively push pertinent success stories to prospects via e-mails, newsletters and other communication vehicles produced by sales and marketing. If you are attending a trade show, it might also make sense to print success stories on glossy paper or have them available on thumb drives. You may also be able to find a magazine that will publish your success story, or the success story may prompt the magazine to assign a writer to write a new success story based on the original. The overall key to publishing success stories is not to sit back and hope your prospects will find the stories on their own. Clearly publicize your stories on your website while encouraging the sales and marketing teams to push the stories to your prospects so that they are read and understood. Done well, this will lead to prospect inquiries that turn into sales.

Step 6—Build a Sustainable Success-Story Program

The final key to establishing a sustainable success-story program is to assign an internal or external source that's responsible for the success of the program. Most small and medium-size businesses will require the resource to manage the project on a weekly basis.

The maintenance program will include checking with the sales teams on the status of success-story customer candidates, managing the writers, managing the approval process, and managing the publishing process. For some businesses, this is too much for an internal resource to manage, so hiring outside resources may be necessary.

Done well, a successful success-story program will pay huge dividends for the sales team in its efforts to close on sales. Nothing illustrates capabilities of a product or service like a success story. Written well, a success story serves as an effective tool in the sales process.

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