

Lifecycle-driven advocacy template

Turn customer value moments into predictable advocacy outcomes.

This template helps customer marketing, lifecycle, customer success, and advocacy teams build a repeatable system for generating reviews, referrals, case studies, references, and speaking opportunities by aligning advocacy asks to the right customer moments.

Rather than asking customers randomly, use this document to identify where value is being delivered, what signals indicate advocacy readiness, and how to activate the right request at the right time.

How to use this template

- Fill this out for one customer segment or one advocacy motion first.
- Use the examples as guidance, then replace them with your own inputs.
- Keep the first version simple. Add more signals, segments, and automation later.

1. Define your advocacy give-get model

Clarify what you give customers and what you want in return. This creates a more intentional value exchange and stops advocacy from feeling one-sided.

What we give customers	What we get in return
<i>Product insights, recognition, exclusive access, strategic visibility</i>	<i>Reviews, referrals, case studies, speaker participation</i>

- Recognition (featured customer, event visibility, personal brand support)
- Access (beta features, roadmap input, executive access)
- Incentives (gift card, discount, free upgrade where appropriate)
- Insights (usage reports, benchmarking, wrapped-style summaries)
- Network (community access, peer introductions, roundtables)

Our strongest value exchange	<i>Customers get benchmark-style usage insights and a chance to showcase results publicly.</i>
Advocacy action we want most	<i>More high-quality G2 reviews from active mid-market customers.</i>

2. Map lifecycle stages to advocacy opportunities

Identify where advocacy naturally fits in the customer journey. The goal is to avoid asking too early and to match the effort of the ask to the customer's level of value realization.

Lifecycle stage	Customer state	Best advocacy opportunity
Activation	Still onboarding and learning the core value(s)	Usually too early; focus on adoption first
Engagement	Using the product regularly and building confidence	Low-effort asks such as reviews, testimonials, or feedback
Expansion	Seeing measurable value and wider adoption	Referrals, case studies, or references
Mature/power user	High adoption and strong satisfaction	Speakers, advisory programs, peer advocacy, strategic stories

Lifecycle stage	Key behaviors or signals	Best advocacy ask
Engagement	Product adoption milestone, active admin, strong sentiment	G2 review or testimonial

3. Identify advocacy readiness triggers

List the moments that suggest a customer is most likely to accept an advocacy request. Use a mix of product, sentiment, commercial, and milestone signals.

Product and usage signals

High feature adoption	<input type="checkbox"/>
Multi-product or multi-client usage	<input type="checkbox"/>
Consistent usage over time	<input type="checkbox"/>
Strong admin or champion engagement	<input type="checkbox"/>

Sentiment and success signals

High NPS (9-10)	<input type="checkbox"/>
High CSAT or positive support experience	<input type="checkbox"/>
Customer shared a positive result or a win	<input type="checkbox"/>
Renewal completed or expansion closed	<input type="checkbox"/>

Trigger	Why it matters	Recommended advocacy ask
NPS = 10	Strong satisfaction signal and likely willingness to help	Review request
Expansion completed	Customer has likely realized enough value to tell a bigger story	Case study or referral

4. Design value moments worth sharing

Build lifecycle experiences that elevate the perceived value of your product. These moments make advocacy feel more natural because customers are receiving something useful before they are asked for anything.

Campaign or moment	Frequency	What the customer gets
Weekly insights email	Weekly	Progress update, product usage insights, trend data
Annual wrapped-style summary	Yearly	A memorable recap of customer activity or outcomes

Most promising value moment to build first:

Monthly admin insight email showing adoption progress and milestones.

Why this moment matters:

It increases perceived value and creates a natural bridge into a review or story ask.

5. Build the advocacy activation flow

For each advocacy motion, document the trigger, target audience, channel, timing, and ask. This creates a repeatable campaign flow that can later be automated.

Trigger	<i>Customer submits an NPS score of 9 or 10.</i>
Audience segment	<i>Mid-market admins in North America with active usage in the last 30 days.</i>
Channel	<i>Email followed by an in-product reminder.</i>
Timing	<i>Within 48 hours of the signal.</i>
Advocacy ask	<i>Leave a G2 review.</i>
Incentive or value exchange	<i>\$25 gift card or community recognition, depending on policy.</i>
Owner	<i>Lifecycle marketing builds the motion; the advocacy team manages follow-up.</i>

6. Match advocacy ask to customer effort

Not every customer should receive the same ask. Use this matrix to align the level of effort required with the customer's readiness and relationship depth.

Advocacy type	Effort for customer	Best time to ask	Example
Review	Low	Early engagement or a strong sentiment moment	G2 review
Referral	Medium	Post-value realization or expansion	Refer a peer or partner
Case study	High	Clear proof of outcome or ROI	Written or video story
Speaker/ webinar	Very high	Power users and strong champions	Customer webinar or event session

7. Build your advocate pipeline

Create a simple system for capturing customers who hit advocacy signals, assigning next steps, and keeping the pipeline moving.

Lifecycle campaigns feed potential advocates into the pipeline	<input type="checkbox"/>
CS or AM teams can consistently nominate customers	<input type="checkbox"/>
Survey and sentiment data are connected where possible	<input type="checkbox"/>
Owners and follow-up dates are clear	<input type="checkbox"/>

Customer/ account	Trigger hit	Current stage	Next action	Owner
Acme Inc.	NPS 10	Review request sent	Follow up in 5 days	Customer marketing

8. Close the loop: reuse advocacy inside lifecycle

The strongest programs do not stop once an advocacy ask is completed. Reuse advocacy content in lifecycle journeys to improve adoption, prove value, and create the next wave of advocates.

Advocacy output	Where it gets reused	Goal
Customer webinar	Onboarding or activation emails	Drive deeper adoption using peer proof
Case study	Expansion nurture or sales enablement	Support growth conversations

9. Quick wins and long-term plays

Use this page to distinguish fast, low-friction experiments from the longer-term work needed to build a durable lifecycle-driven advocacy engine.

Quick wins (0–30 days)	Longer-term priorities (3–12 months)
Launch NPS-to-review email	Build a lifecycle trigger library
Identify the top 20 happy customers	Create value-moment campaigns
Standardize advocacy follow-up timing	Connect advocacy data to lifecycle segmentation

10. Success metrics and review cadence

Track both output metrics and business impact. Keep the scorecard short enough to manage, but specific enough to show whether the system is working.

Metric	Baseline	Target	How we measure	Cadence
Reviews generated	12/quarter	25/quarter	Platform reporting	Monthly
Referral volume	3/month	8/month	Referral tracking	Monthly
Case study conversion rate	8%	15%	Requests accepted/ requests sent	Quarterly
Advocacy-influenced expansion	Unknown	Defined baseline	Pipeline or account analysis	Quarterly

11. 30-60-90 day action plan

Translate the template into execution. Focus first on one audience, one trigger set, and one advocacy ask.

Timeframe	Focus area(s)	Key actions	Owner	Success metric
Days 1-30				
Days 31-60				
Days 61-90				