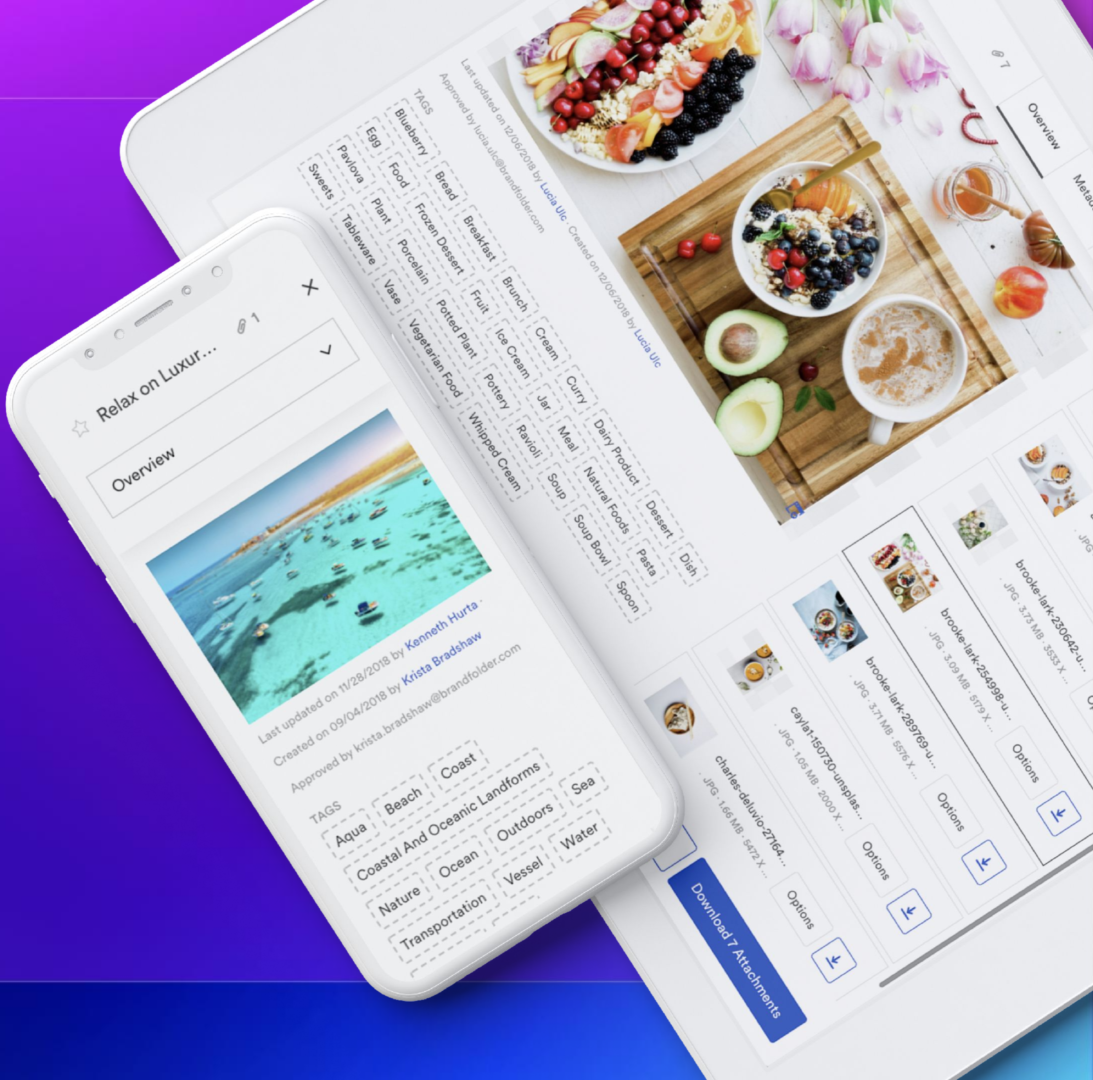
Brandfolder
by smartsheet

Customer Reference Training

Updated June 15, 2023



Meet the Community Team

Amber Blodgett
Manager, Community Marketing

MacKenzie Koss
Community Marketing Specialist

Dos and Don’ts of Customer References

Customer Use Case

Do request a reference when…

A prospect wants a **high-level understanding** of a customer's experience with Brandfolder (i.e. onboarding, general sentiment).

Don't request a reference when…

A prospect wants to understand how to use a specific feature or integration.

While we always do our best to match your prospect with a customer of similar size, spend, and industry, Brandfolder use cases can vary on a customer to customer basis. Additionally, finding a customer who uses a specific integration (especially an out of the box integration), and will agree to be a reference, can be extremely difficult and time consuming.

Sales Stage

✅

Do request a reference when…

Your deal is **further along** in the sales cycle - "Negotiation" phase or later.

🚫

Don't request a reference when…

Your deal is very early in the sales cycle.

A customer reference should be the very last check box on your deal and Brandfolder should already be the prospect's preferred vendor when a customer reference is brought in.

Reference Initiator

✅

Do request a reference when…

Your prospect specifically asks for a customer reference (either verbally or in writing).

🚫

Don't request a reference when…

You are asking a prospect if they'd like to take a call with a customer because you think it's going to help close the deal.

A customer reference should be the very last check box on your deal and Brandfolder should already be the prospect's preferred vendor when a customer reference is brought in.

RFP

🚫

Don’t request a reference when…

You are filling out an RFP and it asks for a reference or contacts.

Here’s what to do instead!

Let your prospect know that we do not provide customer contact information without their permission but we are happy to set up a reference call if we make it to the final stages of the sales cycle and we are their preferred vendor.

Process, Roles & Responsibilities

1.	Submit reference request	Sales
2.	Follow up with requestor within 1 business day	Community
3.	Intro email(s) to customer(s)	Community
4.	Follow up with customer if no response in first 1-2 days	Sales
5.	Once customer agrees, pass customer info along to prospect	Sales

Tips & Reminders

- Set clear expectations with your prospect from the get go. Don't be afraid to push back a little.
- We require **2 full business days minimum to source a customer reference, but please keep in mind that this process can take longer.** We do everything we can to make tight deadlines but please understand that we do not keep any customers "on retainer." Every request requires email outreach and sign-off from our customers before we can make introductions.
- Please try to keep your reference requests to 1-2 customers max (when needed), but let the community team know if and why more are needed.

Community Dashboard