Accelerating Sales Velocity and Customer Advocacy: Building a Customer Reference Program

Presenter:
Lydia Flocchini + Ed Deaton
March 19, 2021

Who We Are: SurePoint Marketing Team

Introduction

Lydia Flocchini, J.D.
Chief Marketing Officer
LFlocchini@rippe.com

- 25+ years in legal tech. 2x award winner of AALL's "New Product of the Year Award"
- Led Marketing for TR's flagship next-gen product, WestlawNext
- Built legal industry's first CS team at Lex Machina. Led company to acquisition by Lexis Nexis
- Authored 60+ articles on legal research, legal analytics and legal tech adoption
- George Washington University Digital Marketing Advisory Council

Ed Deaton, ABD
Marketing Director
EDeaton@rippe.com

- 8-years in Digital Marketing
- 6-years as a Design Professor
- Tech Branding/Culture background
- ABD - Organizational Leadership Xavier University
- MFA - Electronic Media University of Cincinnati

Marketing

Mission

- Brand Awareness
- Lead/Demand Generation
- Product Marketing
- Community Engagement
- Company Communication

Purpose of Today's Meeting

- Share the process we used in building a Customer Reference program
- Provide best practices for creating a repeatable, scalable process
- Showcase strategies for doing this cost-effectively
- Share ideas for measuring impact and success

Who We Are: SurePoint Branding
Differentiation

DEFINITION

What is our purpose? How do we define ourselves?

We provide mid-tier law firms with the enterprise software they require to better run their business and focus on their clients.

Focused on firms with unique needs; complex requirements and a need for efficiency.

We serve the backbone of the legal industry – the regional, community and local firms that serve enterprises large and small as well as everyday Americans in their time of need.

We provide mission critical, central platform that underpin the core operations of the firm, spanning back to front office.

Promote the societal good of fulfilling their legal "calling".

Our role is to allow firms to operate more effectively and efficiently, and to provide insights into the performance drivers critical to their success.

50,000+
Legal Professionals

350+
Law Firms

40+
Years of Innovation

SurePoint®

WOODS | AITKEN

HINKLE SHANOR LLP (SINCE 1888)

BAILEY & GLASSER LLP

Williams Montgomery & John
TRIAL LAWYERS

COOLIDGE WALL
A Legal Professional Association

FREEHILL
HOGAN & MAHAR LLP

D | J | P DURHAM JONES & PINEGAR

GILBERT LLP

COPELAND
COOK
TAYLOR &
BUSH

LUBIN | OLSON

(MCBRAYER)

C|V|M|M
COUSINEAU | VAN BERGEN
McNEE | MALONE

PM PARKER McCAY

SDV
SAXE DOERNBERGER & VITA, P.C.

Pedersen
Pedersen & Houpt

MARON MARVEL
BRADLEY ANDERSON
& TARDY LLC

DBL Law
The Practice of Excellence

isaac wiles

K&P KOHNEN & PATTON

MurphyDesmond S.C.
LAWYERS

DOPF, P.C.

FRANTZ WARD

SLEVIN & HART, P.C.

gould+ratner

Understanding the Buying Journey

Our Definition

A reference is a customer who is willing to **share their experiences** working with SurePoint as a company and LMS as a product with a prospect in a positive light.

Understanding the Buying Journey

Prospects have requested references as part of their decision-making process.

- Big investment, implementation and process/organizational change management
- Sales team would request references

Patterns We Observed

- We saw patterns in our win/loss data that prospects asked for references **between evaluation and proposal**
- References took customer to the next phase
- Accelerated opportunity velocity
- We started anticipating the stage when references will be requested
- Note: Also learned prospects will solicit from online forums

Key Questions Sales Asks Prospects

- What is it that you are hoping to learn?
- Who is going to make the call?
- When will you be reaching out so that you can alert the reference?

Why Build the Reference Program?

Where we started:

- Repository of unverified references collected over the prior years
- Documented in a spreadsheets
- Outreach was done by whomever had the closest relationship with contact
- References critical to buying process

Why Build the Reference Program?

Goals of the Reference Program:

- Support revenue generators
- Leverage current client champions to provide a reference for a prospective client
- Provide the prospective client with a vision of success by learning through the experience of the reference client speak
- Strengthen relationship with reference client at the same time by showing appreciation for their time and partnership
- Build network of references
- Systematize and scale process

The Framework for Building the Program

Create a Repeatable, Scalable Process that Leads to Explosive Growth

- IDENTIFYING SOURCES
- BUILDING YOUR REPOSITORY
- GETTING INPUT AND FEEDBACK
- CONFIGURING YOUR CRM
- CONDUCTING OUTREACH
- SHOWING GRATITUDE
- TRACKING/REPORTING
- CONTINUOUS IMPROVEMENT

Identify Sources

NPS
- Promoters
- Look through feedback

Support
- CSAT
- Trends for Usage/High Engagement
- Direct feedback

RM/AM/CS feedback
- Who does the customer team recommend?

Product feedback
- In-app
- Chat

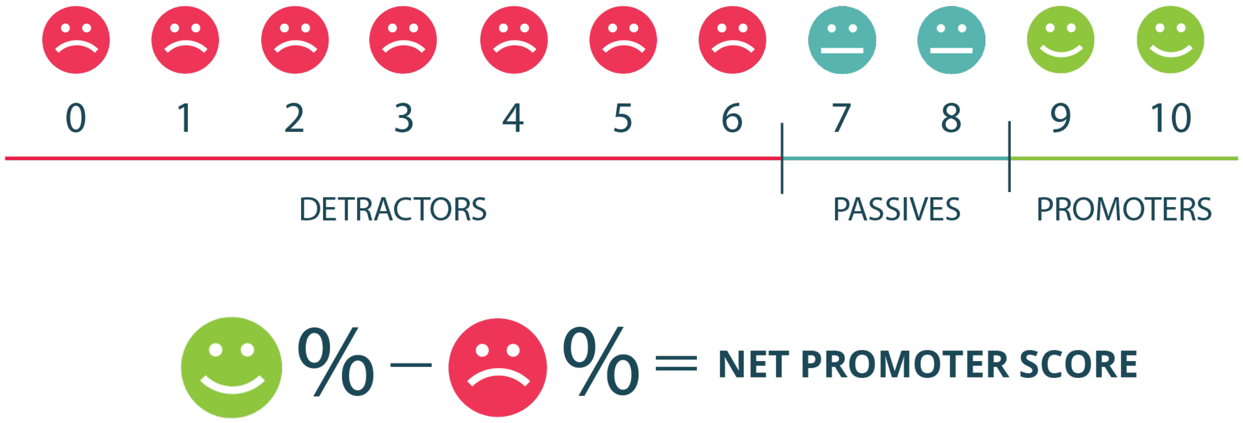
Advisory Boards

Customer Innovation Team

Community Forums

Leverage positive relationships you already have

Capterra/G2 Reviews
- Anyone that has left positive reviews is a potential reference



Build the Repository

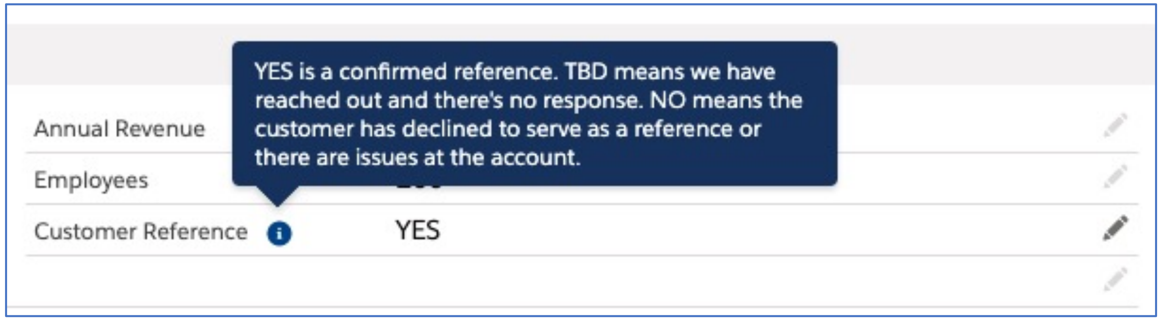
- Once you have gathered all the potential references, enter them in a spreadsheet that includes relevant data points.
    - Title of contact
    - # of attorneys
    - City
    - State
    - Practice areas
    - Type of system
    - Incumbent system
- Tip: Salesforce
    - You could use Salesforce, but you may not want to start creating custom objects

Input and Feedback

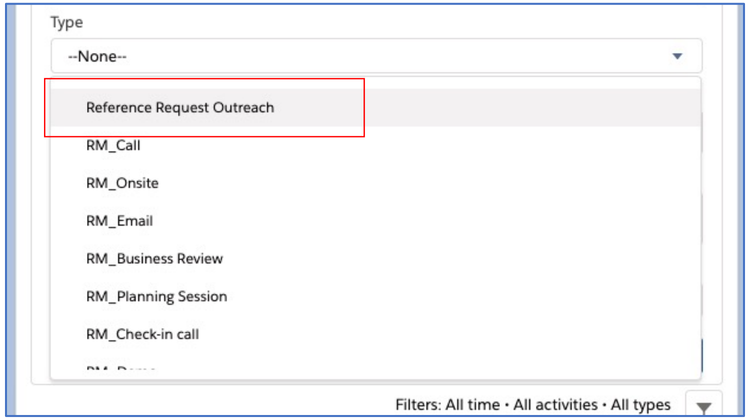
- Share repository with Go-to-market team
- Share with the leadership team
- Get consensus
- **Tip**: This will vary by your organization. Be transparent
- Look at support tickets, are there any complaints, or potential deals that would be impacted if you conducted outreach.

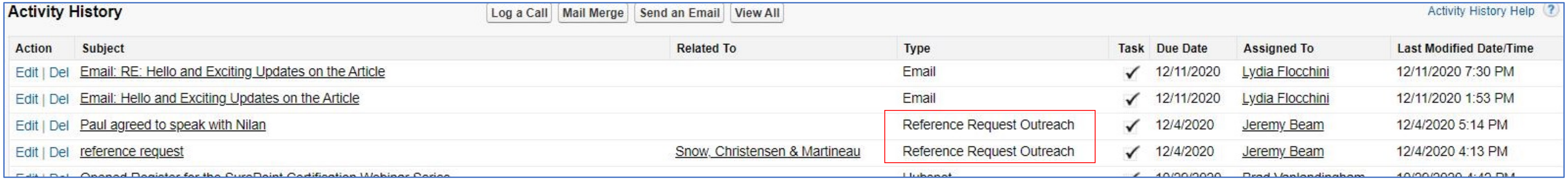
CRM Configuration

- Account – Create a Reference tag
- Contact - Create a Reference tag
- Report – Create a report which becomes your "**source of truth**" so that everyone can see references
- Design Activity tracking process and reporting



CRM Configuration – Contact Level





CRM Configuration – Customer Reference Report

Set up a report that has the following recommended fields:

- Account Owner
- Company / Account (who is tagged a reference)
- City
- State
- Contact (who is tagged a reference)
- Contact Title
- # of Lawyers
- Incumbent System
- Practice Areas

Outreach: Tech Touch/ 1 to Many

Cast a Wide Net to Get References

- Templated language – screenshot
- Used custom field to personalize
- Provide a dedicated channel for responses
- Explain the program
- Once customer agrees, apply tagging process
- If no response, a follow-up email
- If customer says no, tag in CRM and alert relationship team

SurePoint LMS Reference Request

ED Ed W. Deaton — Monday, August 10, 2020 at 4:29 PM
To: Cc: Lydia Flocchini; +1 more

Hello Tanya,

I hope this email finds you well.

I am reaching out on behalf of SurePoint Technologies (formally Rippe & Kingston Systems) to see if you would be comfortable acting as a reference for prospective clients that are considering replacing their current system with the SurePoint Legal Management System (LMS).

We recognize the value and importance that legal professionals place on the experience of their peers in legal leadership. Our team would like every firm that joins our community to feel confident in their decision to move to LMS. Your willingness to share your insights and experience would be invaluable to their evaluation.

If you are open to serving as a reference, we would contact you first and provide you with the contact information of the prospective firm, as well as any details regarding their interest. Once we hear from you, we would then provide your contact information to the prospective client. They would then contact you to schedule a time for you to meet.

We greatly value our partnership with your firm and appreciate all that you do as part of the SurePoint Community. If there is anything we can to do to help or feedback you would like to share, please let me know.

Thank you for your time and consideration of this request. I look forward to hearing from you soon.

-Ed

Ed Deaton
Digital Marketing Strategist

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4850 Smith Road, Suite 101, Cincinnati, OH 45212

surepointtech.com

SurePoint

Outreach Based on Prospect Request

Prospect asks sales for a reference

Key Questions to Ask the Prospects

- What is it you are hoping to learn?
- Who is going to make the call?
- When will you be reaching out so that you can alert the reference?

Provide parameters

- Max of three references
- Engage Customer within a week
- Confirm customer criteria
- You will send an email with customer contact data
- You will follow-up to ensure contact has been made

Outreach Based on Prospect Request

- Send an email
- Follow up with calls
- If no response after 3 days, call and send another email
- When the customer responds,
  - Provide prospect details
  - Tag in Salesforce
  - Log Activity
  - Give gift
- If customer says no, tag "NO" and alert the relationship team
- Even if "NO" reach out to thank them and give them a gift to show our appreciate for being part of the Community
- Due Diligence
  - Really important to keep copies of emails where customer agrees
  - If you have Salesforce integration, it’s easy to keep track

Example Individual Outreach Email

I hope this email finds you well.

I run the marketing team here at SurePoint (formally Rippe & Kingston Systems). I am reaching out to see if you would be comfortable acting as a reference for prospective clients that are considering replacing their current system with the SurePoint Legal Management System (LMS). The firm specifically has asked to speak to another firm in New York City. The firm is:

a 40 attorney firm out of New York City.

If you are open to it, I can send the contact information.

We recognize the value and importance that legal professionals place on the experience of their peers in legal leadership. Our team would like every firm that joins our community to feel confident in their decision to move to LMS. Your willingness to share your insights and experience would be invaluable to their evaluation. This firm is very interested in learning about your onboarding experience. I am sure with the current situation, moving to the cloud and being able to work across a distributed team has become a priority in our new normal.

If you are open to serving as a reference, we would contact you first and provide you with the contact information of the prospective firm, as well as any details regarding their interest. Once we hear from you, we would then provide your contact information to the prospective client. They would then contact you to schedule a time for you to meet.

Gratitude – *the Best Part!*

- Send a thank you when a customer agrees to be part of the program as well as when they act as a reference
- We also send a $50 e gift card.
  - If you have gifting platform, can choose thank you options that work for your customers.
- Be aware of gifting rules

Gratitude – *the Best Part!*

Very nice and much appreciated. thank you!!

Thank you Lydia for the kind gift, it certainly was not necessary as I am big fan of Rippe/SurePoint. I love you Scientist title!

Thank you, Lydia, that is really generous. They were a nice Firm and I hope they chose SurePoint (I still call it RIPPE!)

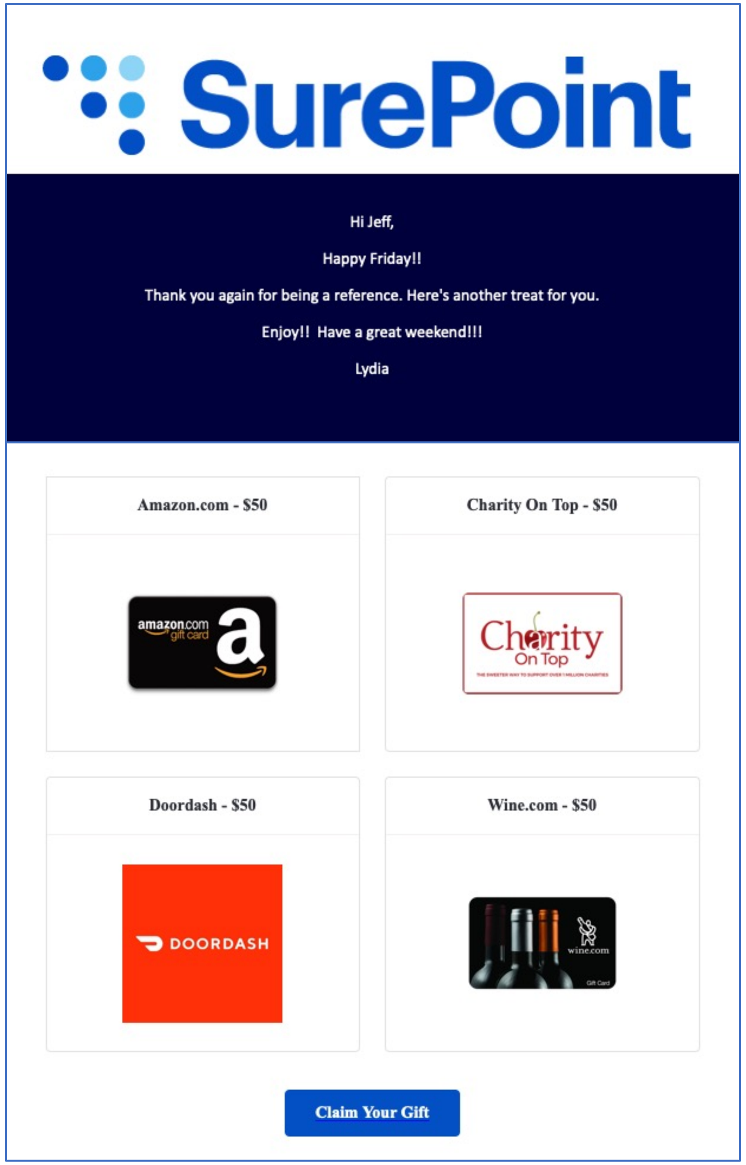
Thank you so much. That's very kind of you!

Hi Lydia,

Thank you so much for thinking of me! I love the folks at SurePoint/Rippe and would do any thing for them.

Happy Holidays!

Thanks Lydia-I did receive this one and was able to access the gift cards. Thanks very much! I expected like a $5 gift card-this was very generous! Happy Holidays!



Tracking/ Reporting

- Track activity task with the ‘reference’ type
- On the contact level, we **relate new business opportunity** and ACV
- This enables you to see the frequency of outreach as well as reference activity tied to that opportunity
- Important to review frequency of outreach
- Set outreach limits: example no more than twice a month
- Share reference list with all parts of the company so everyone knows who the reference accounts are
- **Tip:** Recommend that your support team flags references

Tracking/ Reporting

Track Frequency of Outreach and Opportunity Movement

Set up a report that has the following recommended fields:

- Date of Activity
- Assigned Owner
- Contact Name
- Company / Account
- Subject of the Activity
- Status
- Name of the Opportunity
- Opportunity Stage

***Salesforce does not allow you to tie revenue data at the activity level

Continuous Improvement

- Don't get complacent
- Don't exhaust/over-use references
- Keep building the relationship
  - Partner with your GTM to make sure are happy
- Check on any support issues
- Listen for new feedback
- Keep growing the list
- Set Goals
  - Example: 1/3 of Clients in program

Driving Customer Advocacy

- How we have we leveraged references?
  - Infuse voice of customer (VOC)
  - Quotes in press releases
  - Testimonials/Spotlights
  - Social media
  - Case Studies
  - Blogs
  - Webinars
  - Reviews
  - Beta testers
  - Videos
  - Panelists at conferences (Rippe World)
  - Thought leadership
  - Vote for awards

Driving Customer Advocacy

LJN LAW JOURNAL NEWSLETTERS

NOT FOR REPRINT

Click to Print or Select '**Print**' in your browser menu to print this document.

Page printed from: *https://www.lawjournalnewsletters.com/2020/09/01/covid-19-and-working-remotely-embracing-the-changes-and-the-challenges-in-a-pandemic-3/*

MARKETING THE LAW FIRM

SEPTEMBER 2020

COVID-19 and Working Remotely: Embracing the Changes and the Challenges in a Pandemic

By LJN Staff

The COVID-19 pandemic has shifted the way we work and forced millions of employees and business leaders to handle their jobs remotely. The idea of working together while apart has prompted many law firms to reevaluate and analyze their strategies for operating safely, securely and efficiently.

Innovative technological tools offer essential real-time software and management solutions that allow users to share and update information virtually. In this roundtable discussion these experts share their experience and insight on driving productivity and engagement during these uncertain times.

Paul Walker (PW), Controller, Snow Christensen & Martineau. Paul Walker joined Snow Christensen & Martineau in 2011 and has over 10 years of experience in both financing and business leadership roles. In his role as Firm Administrator, he successfully manages the financial and business activities and overall operations of the firm.

Stephanie Storkel (SS), Chief Operating Officer, Pedersen & Houpt. Stephanie Storkel is an accomplished business leader whose diverse background covers the banking, product management and professional services industries. Over the past 25 years, she has led the advancement of both corporate and privately held entities and worked directly with executive officers, boards of directors and shareholders.

Tom Obermaier (TO), CEO, SurePoint. Tom Obermaier is an accomplished leader with a 30-year track record of working with high-growth software and service companies as well as global law firms. He has held senior leadership roles with Deutsche Bank AG, Bankers Trust Company, and was formerly a practicing attorney with Skadden Arps.

Q: How are firms measuring and looking at profitability in light of the impact of COVID-19? How are strategies changing?

SS: Existing strategies for 2020 are not changing, but have become more intensified, in order to deliver the desired financial results to the Partnership whether or not employees are in the office or working from remote locations. Ongoing client communications and potential client communications remains our foremost priority for all attorneys across practice groups, and industry segments. Financial cycles, deadlines and timekeeper cooperation are monitored closely and we look to improve

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5,699 followers
8mo • Edited •

SurePoint Shining Lights of Innovation:
This week we shine our light on Jose Cheesman of Hall Prangle & Schoonveld, LLC.

Jose connected with the SurePoint Support team to receive insight on a cost coding request. While working with Senior Support Analyst Laura Pierce, Jose and Laura defined the issue, identified the solution and developed a plan for their firm. Jose later reached out to Dana Marquez, the firm's SurePoint Relationship Manager, to share what a positive experience he had working with the SurePoint team.

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SurePoint Shining Lights of Innovation:
This week we shine our light on Matt Mellert, CPA of Bailey Glasser

The Bailey Glasser team strengthened the accounting department's efforts by utilizing the ACH (Automated Clearing House) payment method available in their SurePoint Legal Management System (LMS). ACH allows for the electronic transmission of funds for payments. Employees are receiving reimbursements in a timely and organized manner and vendors are being paid in an easy and transparent process.

"ACH payments eliminate the need to print, sign and mail physical checks, saving both time and money." said Mellert, "The entire payment process can be completed electronically while working from the office or remotely".

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SurePoint Shining Lights of Innovation:
This week we shine our light on Andrea Myers of Miller Johnson

When the pandemic hit, firms from coast-to-coast were forced to close their doors and begin working remotely. Traditional methods of distributing hard copy Billing Invoice Memos (BIMS) became increasingly problematic. To combat the inefficiency of physically printing, reviewing and mailing BIMS, the Miller Johnson team made the decision to implement electronic billing for their attorneys.

"I reached out to our Relationship Manager Dana Marquez to determine which electronic billing application would be the right fit for our firm." shared Andrea Myers. "After making our selection, we worked extensively with our Client Advocate Jennifer Webster to get everything set up. We also worked with our internal technology team to develop a guide for the attorneys on how to best utilize the application to review their online BIMS and make billing decisions. We were up and running with the new application in about 2 weeks."

The Miller Johnson team was able to eliminate the headaches created by cumbersome paper BIMS by simply implementing the LMS electronic billing application into their everyday processes.

Mark S.
Chief Financial Officer
Law Practice, 51-200 employees
Used the software for: 2+ years

Overall Rating ★★★★★ 5/5

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Ted R.
Director of Finance and Administration
Law Practice, 51-200 employees
Used the software for: 2+ years

Overall Rating ★★★★★ 5/5

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required both
costs.
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provide any way to
other product.

Israel M.
Director of Operations
Law Practice, 51-200 employees
Used the software for: 1-2 years

Overall Rating ★★★★★ 5/5

Show More Ratings

"Very pleased with product"

Overall: Overall, it has been a nice addition of tools that we have implemented at Donahue Fitzgerald. From looking at client-matter information, to running conflicts and processing intakes, I am very pleased with the overall use of the the LMS system. In my 18 years of being in legal, Rippe / Surepoint got it right.

Pros: I oversee conflicts / intakes for the firm, so for me it was mostly about creating a seamless workflow environment that captured all the information, but that also allowed for all stakeholders during a conflict/intake to be looped into the process, our contacts at Surepoint/Rippe were able to do that and more.

Cons: I have yet to experience anything that is challenging or complicated.

Reasons for Choosing Legal Management System: I suspect that our Finance Director felt this was the best overall product. Thank you.

Switched From: Tabs3 Software

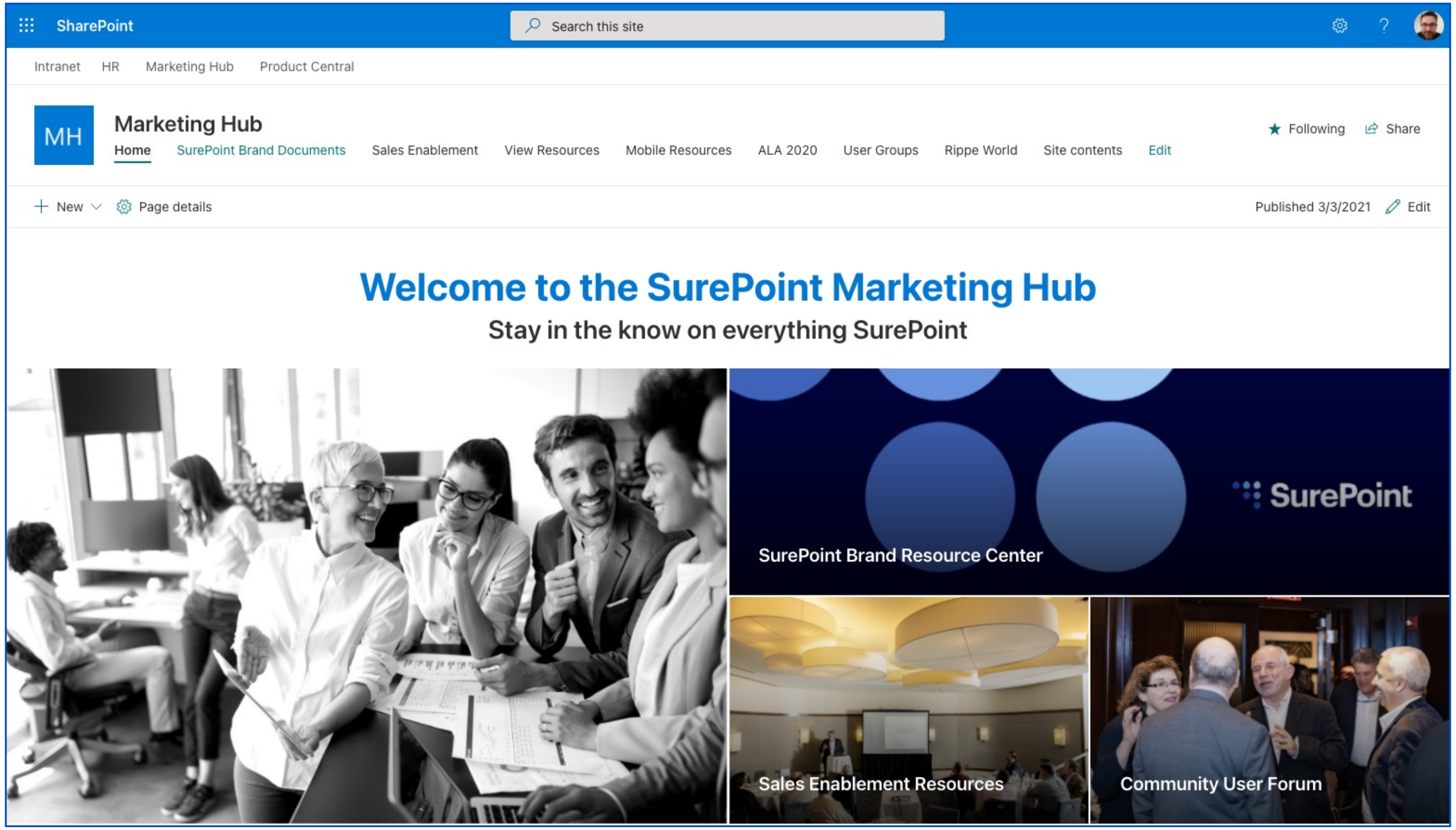
Reasons for Switching to Legal Management System: Tabs / practicemaster was useless, dated and the worst product ever.

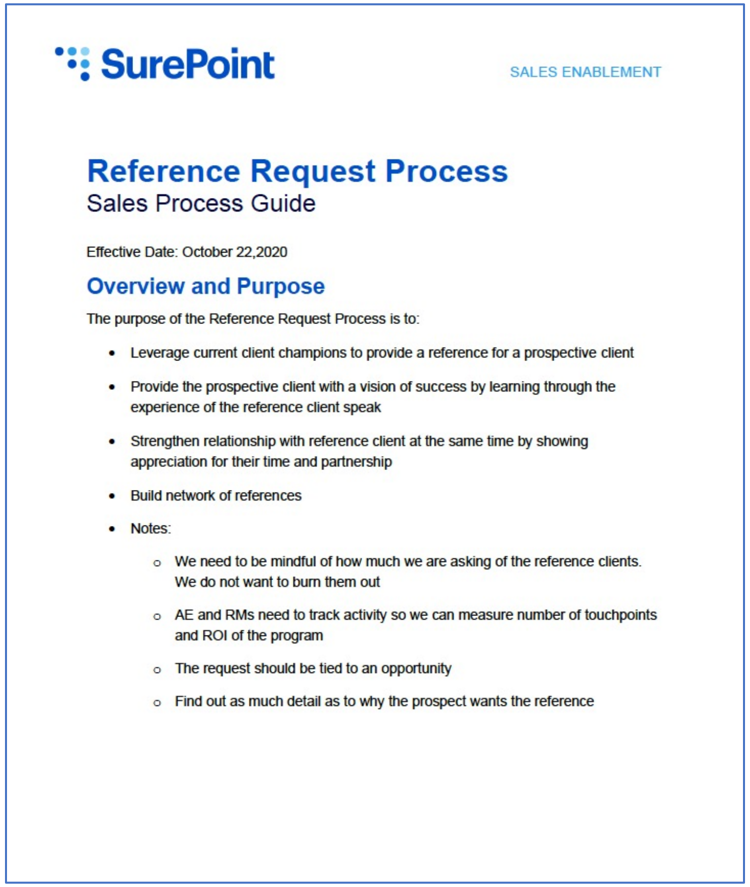
Reviewer Source
Source: Capterra
April 7, 2020

Future State: Sales Execution

- Migrate to sales
- When is the time right?
  - Once the process is accepted/well-implemented you can remove further bottlenecks
  - Database is robust
  - Tech-enabled
  - People are familiar with the process
  - Develop a process document
  - Make part of your sales enablement strategy

Marketing Hub





SurePoint

SALES ENABLEMENT

Reference Request Process

Sales Process Guide

Effective Date: October 22,2020

Overview and Purpose

The purpose of the Reference Request Process is to:

- Leverage current client champions to provide a reference for a prospective client
- Provide the prospective client with a vision of success by learning through the experience of the reference client speak
- Strengthen relationship with reference client at the same time by showing appreciation for their time and partnership
- Build network of references
- Notes:
  - We need to be mindful of how much we are asking of the reference clients. We do not want to burn them out
  - AE and RMs need to track activity so we can measure number of touchpoints and ROI of the program
  - The request should be tied to an opportunity
  - Find out as much detail as to why the prospect wants the reference

Future State: Sales Execution

Who Owns What?

Marketing

Develop process documents and templates

Add more references through tech touch outreach

Train the team

Share updates with the team

Gifting

Maintain System

Monitor Activity

Sales

Prior to outreach check with Relationship Managers

Communicate with prospect and customer

Log/tag activities

Update Marketing on gifting

Send copies of emails to marketing to house

Relationship Managers

Build Value*

Trusted Advisor*

Introductions

Greenlight outreach

Metrics for Success

- Track # of References Q/Q, FY/FY
- Deals Influenced in FQ/FY
- Deals Won in FQ/FY
- ACV in FQ/FY
- References who you leveraged in other programs

SurePoint

Thank You