2024 ADVOCACY SURVEY RESULTS

APRIL 2024

Created By:

Mary Green of CMAweekly

Sponsored By:

CHAMPION

Important Information about the Survey:

170 Customer Marketing & Advocacy Managers & Directors participated.

266 Rankings were submitted (Each participant could submit 2 rankings).

Participants were asked how likely they were to recommend the solution they used.

THANK YOU to everyone who participated!

Solutions Listed in the Survey:
Champion, Influitive, Deeto, ReferenceEdge, UserEvidence, SlapFive, Base, Orca
Spreadsheet, Project management tool, CRM

Solutions Written in:
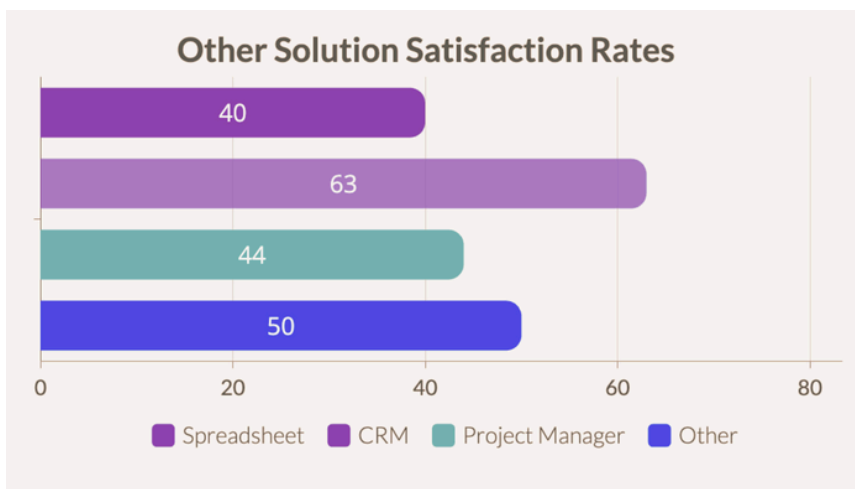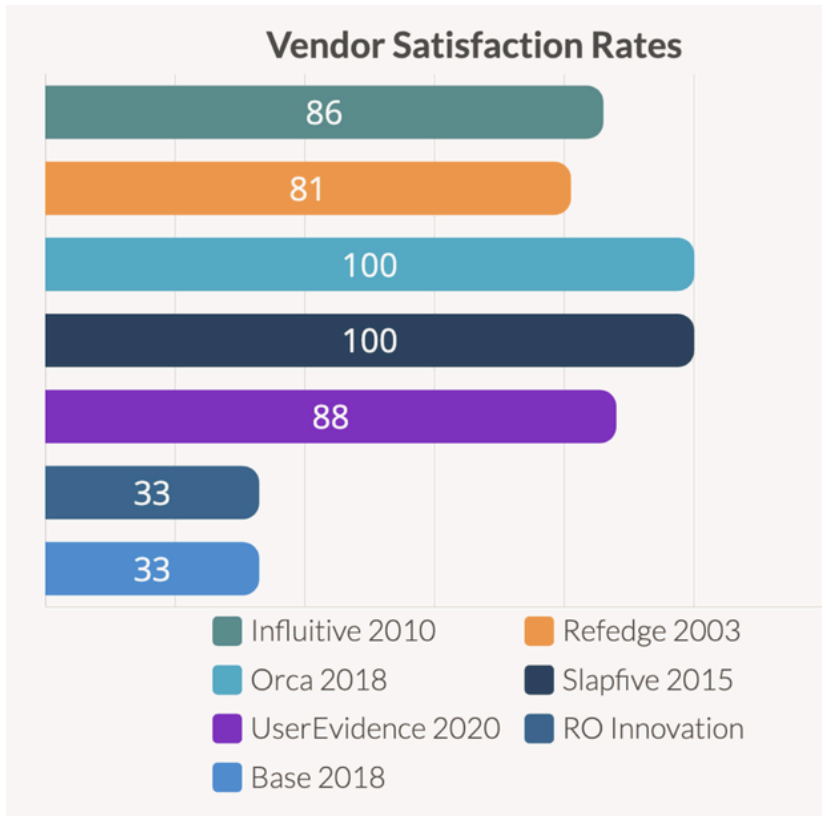Upland RO Innovation, Planhat, Airslate, TechValidate, BirdEye

Method for Results:
All recommendations were averaged. I'm including the number of each ranking below.
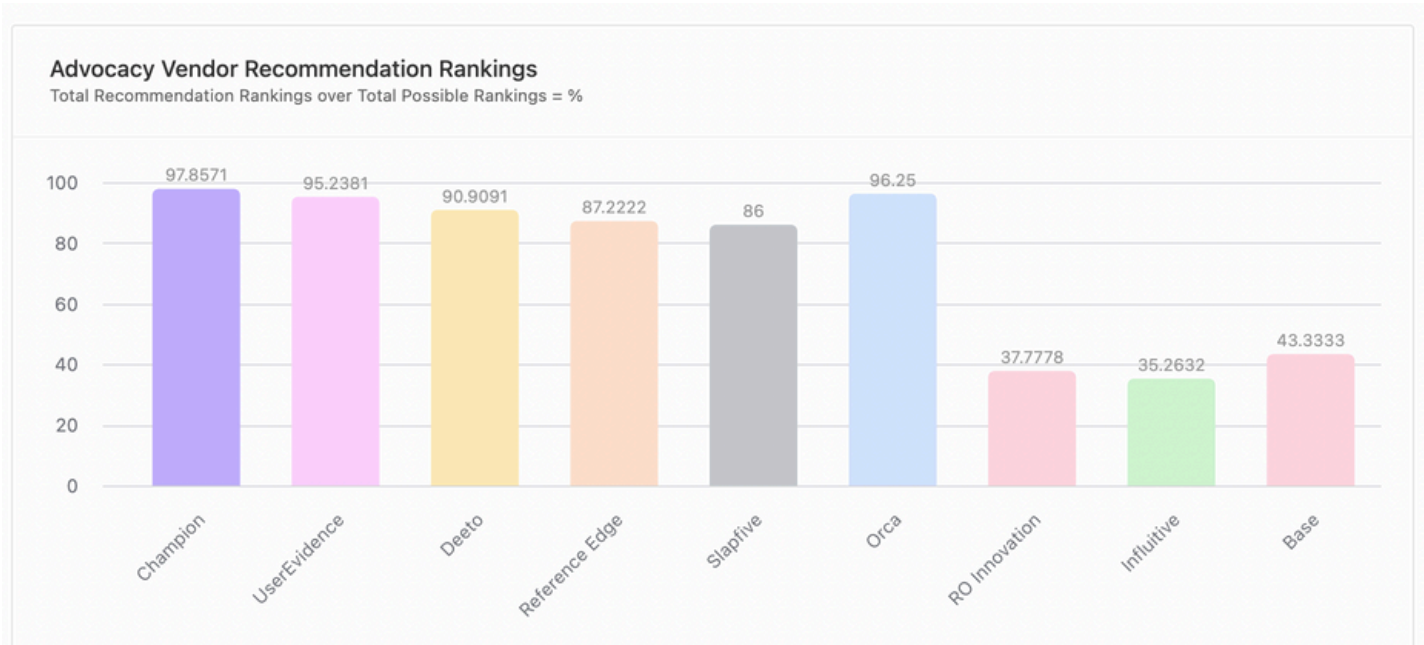
Quotes from your colleagues:
All personalized information is removed without changing the comment's meaning.

RESULTS FROM 2023

Vendor Satisfaction Rates

Vendor	Rate
Influitive 2010	86
Refedge 2003	81
Orca 2018	100
Slapfive 2015	100
UserEvidence 2020	88
RO Innovation	33
Base 2018	33

Other Solution Satisfaction Rates

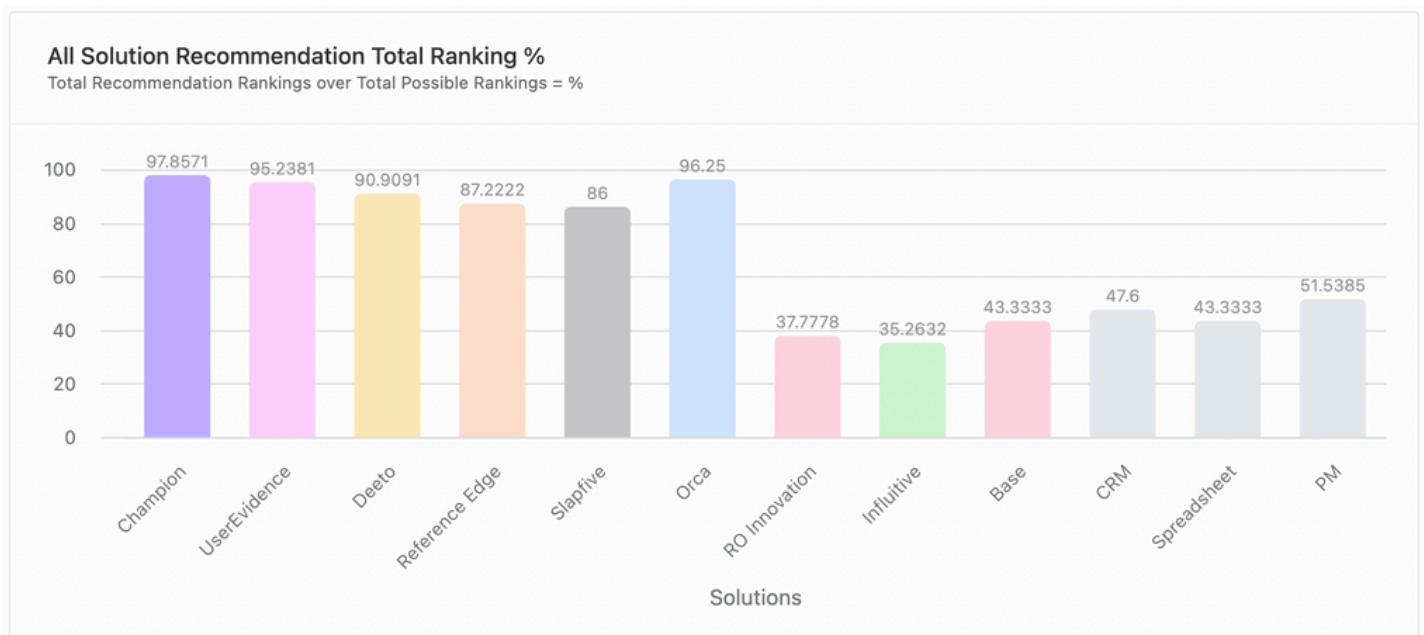| Solution	Rate
Spreadsheet	40
CRM	63
Project Manager	44
Other	50

2024 RESULTS

Your fellow colleagues clearly prefer Champion, UserEvidence, Reference Edge, Deeto, SlapFive, and Orca.

Advocacy Vendor Recommendation Rankings
Total Recommendation Rankings over Total Possible Rankings = %

Solution	Value
Champion	97.8571
UserEvidence	95.2381
Deeto	90.9091
Reference Edge	87.2222
Slapfive	86
Orca	96.25
RO Innovation	37.7778
Influitive	35.2632
Base	43.3333

Free or almost free options such as your CRM, Spreadsheets, and a Project Management Solution are less preferred, along with RO Innovation, Base, and Influitive.

All Solution Recommendation Total Ranking %
Total Recommendation Rankings over Total Possible Rankings = %

Solution	Value
Champion	97.8571
UserEvidence	95.2381
Deeto	90.9091
Reference Edge	87.2222
Slapfive	86
Orca	96.25
RO Innovation	37.7778
Influitive	35.2632
Base	43.3333
CRM	47.6
Spreadsheet	43.3333
PM	51.5385

Solutions

CHANGES FROM 2023 TO 2024 FOR VENDOR SOLUTIONS

In 2023 Influitive was one of the top-rated solutions, but due to the acquisition in December 2023, the lack of continued support, and several reported technical issues, it has quickly lost its high ranking.

The acquisition of Influitive has caused a major increase in innovation in the Customer Advocacy space with several vendors quickly adding new features to attract new customers.

Champion and Deeto have both been added as new vendors to the space.

ABOUT SPREADSHEETS

In the 2023 survey, several people reported using both a paid vendor and spreadsheets. It's difficult to find someone who isn't using spreadsheets in some way in their program.

But it is clear that using an advocacy platform significantly saves time and energy (and automation).
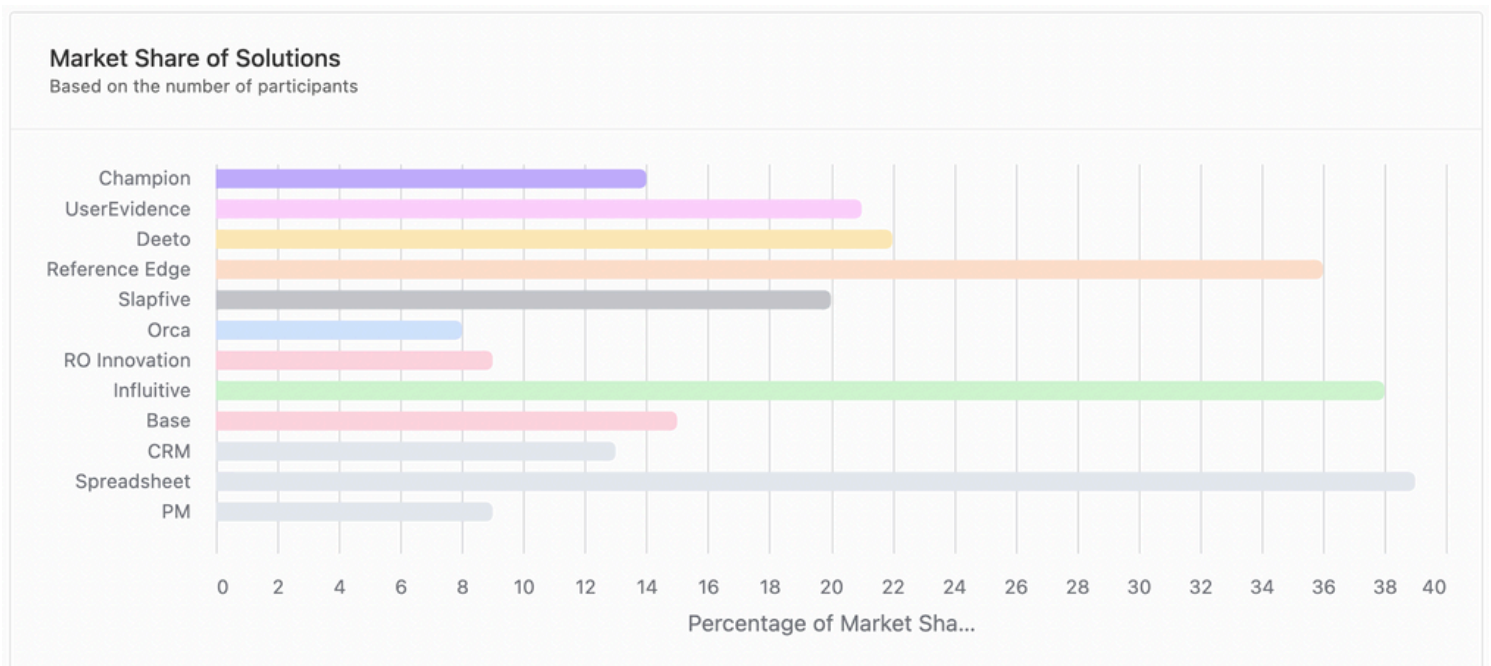
Market Share Based On Participants

Leader: Spreadsheets

In the results from last year to this year, spreadsheets seem to have taken a hit. But the language for last year's survey asked participants to share their solution, this year's asked participants to share their vendor causing several people to only participate after being told spreadsheets were still listed.
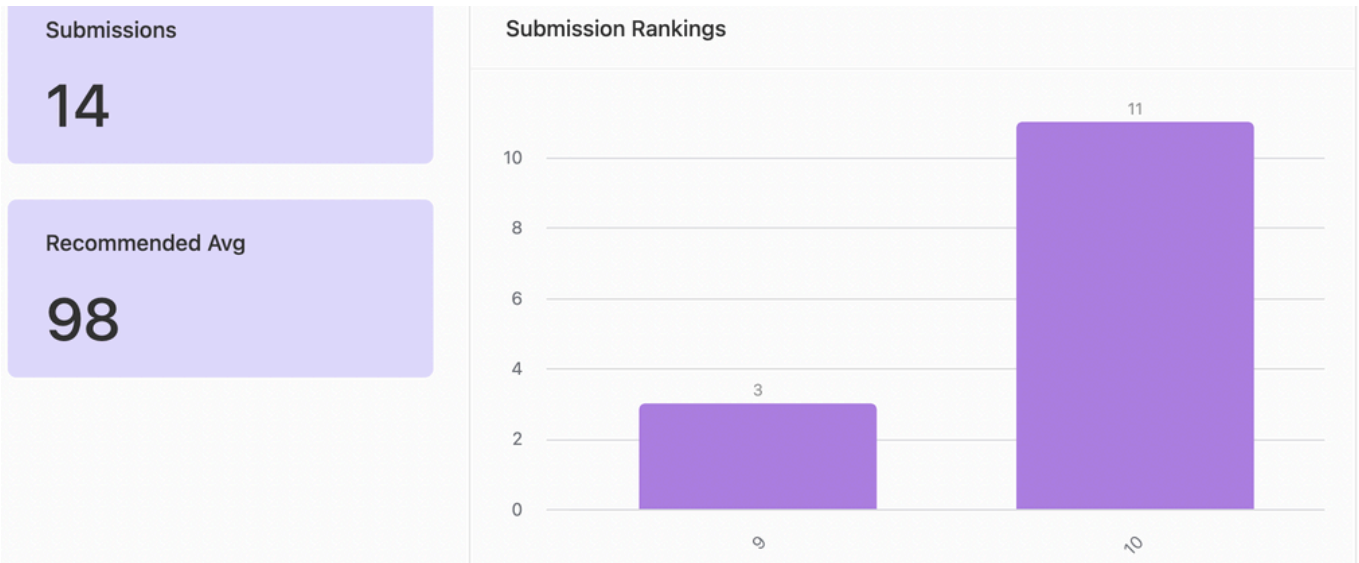
Largest Market Shares

Influitive & ReferenceEdge were the two most mentioned vendors last year, as well.

Market Share of Solutions
Based on the number of participants

CHAMPION

Submissions
14

Recommended Avg
98

Submission Rankings

3	11

(x-axis: 9, 10)

Feedback

"Great team support throughout, building a game-changing solution, much needed in market."

"Champion has both a workflow offering (to make it easy) AND an algorithm to identify the champion. Plus, they're built for the Enterprise and integrated with Salesforce!"

"Since identifying stakeholder turnover as an opportunity to win business in their new companies, we'd been looking for a tool to help us better productize our process and flag additional potential buyers across our accounts. Champion has built a tool that has influenced an entire prospecting playbook and we're on our way to building new connections with new companies and opening up new opps. It's a great tool with a great team."
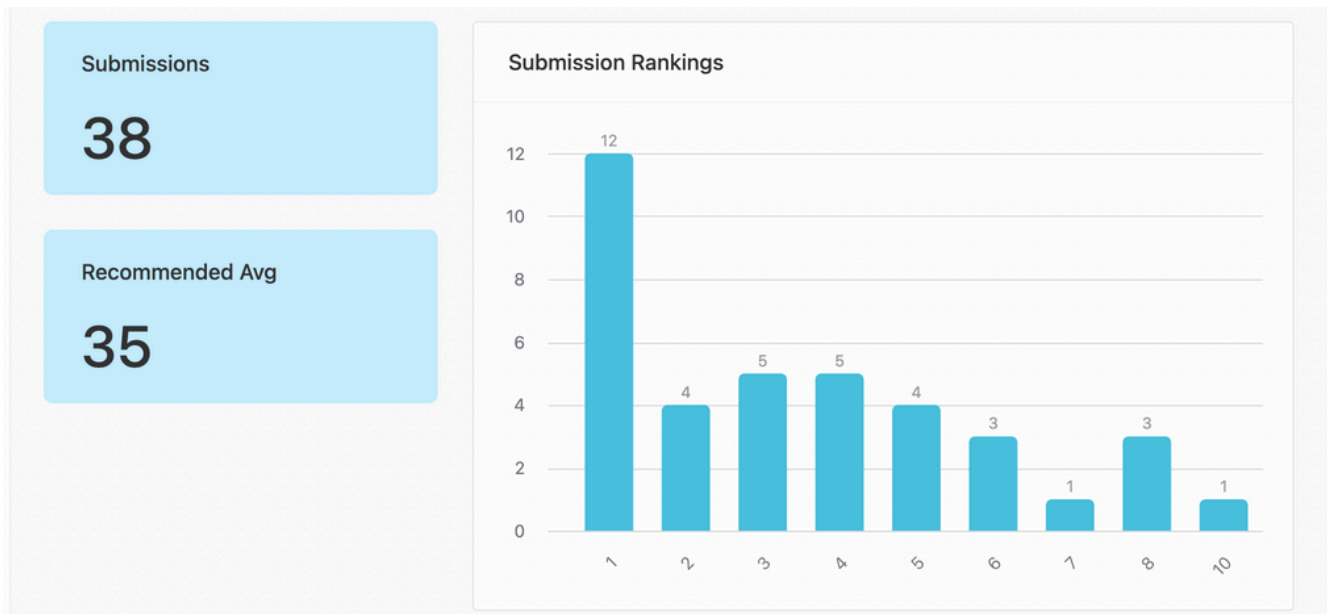
POSITIVE	NEGATIVE	HIGHLIGHTS
Extensive Filtering & AI Matching	Newest in the space.	Innovative Partner with Job Tracking, Reference & Advocacy management

INFLUITIVE

Submissions	Submission Rankings
38	

Recommended Avg
35

Submission Rankings chart:
- 1: 12
- 2: 4
- 3: 5
- 4: 5
- 5: 4
- 6: 3
- 7: 1
- 8: 3
- 10: 1

Feedback

Negative: Several issues since the acquisition.

"Prior to the acquisition I would have recommended them wholeheartedly and did, but since the acquisition the service is zero and the platform is having performance issues. If my members can't log in or communicate via the platform it's not doing it's job."

"Prior to the Influitive acquisition I would have undoubtedly ranked it a 10. However, since that time I have lost trust in their ability to understand the industry, provide expertise and operate as trusted business partners."

POSITIVE	NEGATIVE	HIGHLIGHTS
2023 Lead Platform	Support Disappeared	The December 2023 Acquisition has sent customers fleeing the platform.

REFERENCE EDGE

Submissions
36

Recommended Avg
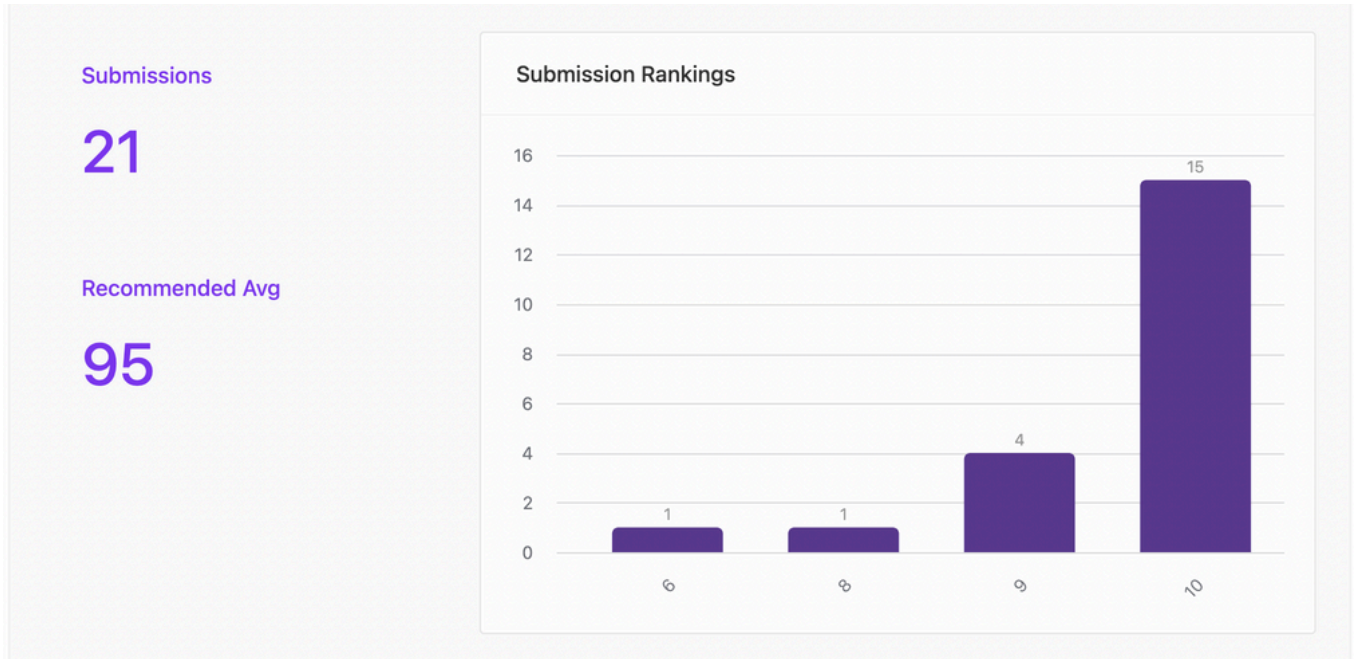87

Submission Rankings
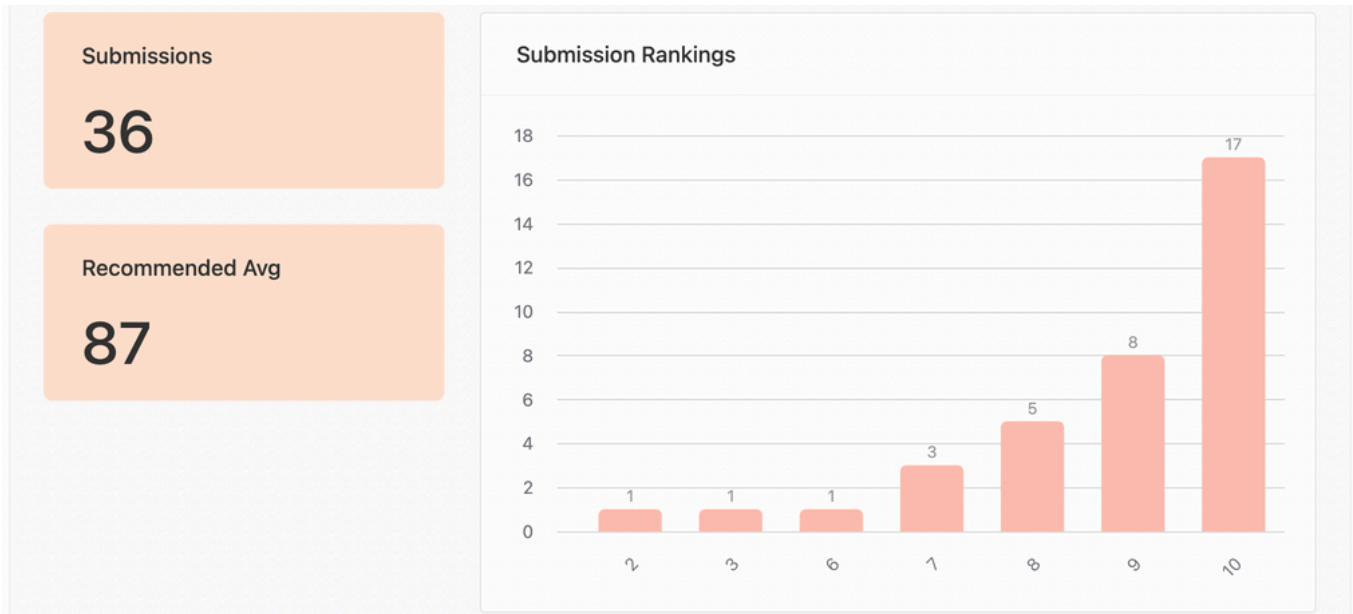
Feedback

"ReferenceEdge is a great tool to track and manage advocacy activities and provides great visibility across the organization on who and what is advocating on our behalf. It helps us keep a "customer first" mentality, ensuring we do not "overuse" customers, and helps us provide the right opportunities to the right customers. "

"RefEdge's interface is slightly outdated and the functionalities could be improved for easier usage and adoption by our sales team."

POSITIVE	NEGATIVE	HIGHLIGHTS
In business since 2003	Adoption & UX	Wonderful industry veteran support.

USER EVIDENCE

Submissions

21

Recommended Avg

95

Submission Rankings

(Bar chart showing submission rankings by score)

| Score	Count
6	1
8	1
9	4
10	15

Feedback

"Great way for teams with little to no content creation and branding support and as a way to have an always-on method to capture social proof. I really like the AI generated short stories and the aggregate metrics."

"GREAT company. Still early so they need a few more abilities in their platform, but they really listen to you. I partnered with them on a leadership-level project and they moved quickly and were amazing to work with."

POSITIVE	NEGATIVE	HIGHLIGHTS
Creating AI features to easily manage all content.	Missing nice-to-have features	Quickly mobilize hundreds of advocates to give feedback.

ORCA

Submissions

8

Recommended Avg

96

Submission Rankings

Feedback values: 8 → 1, 9 → 1, 10 → 6
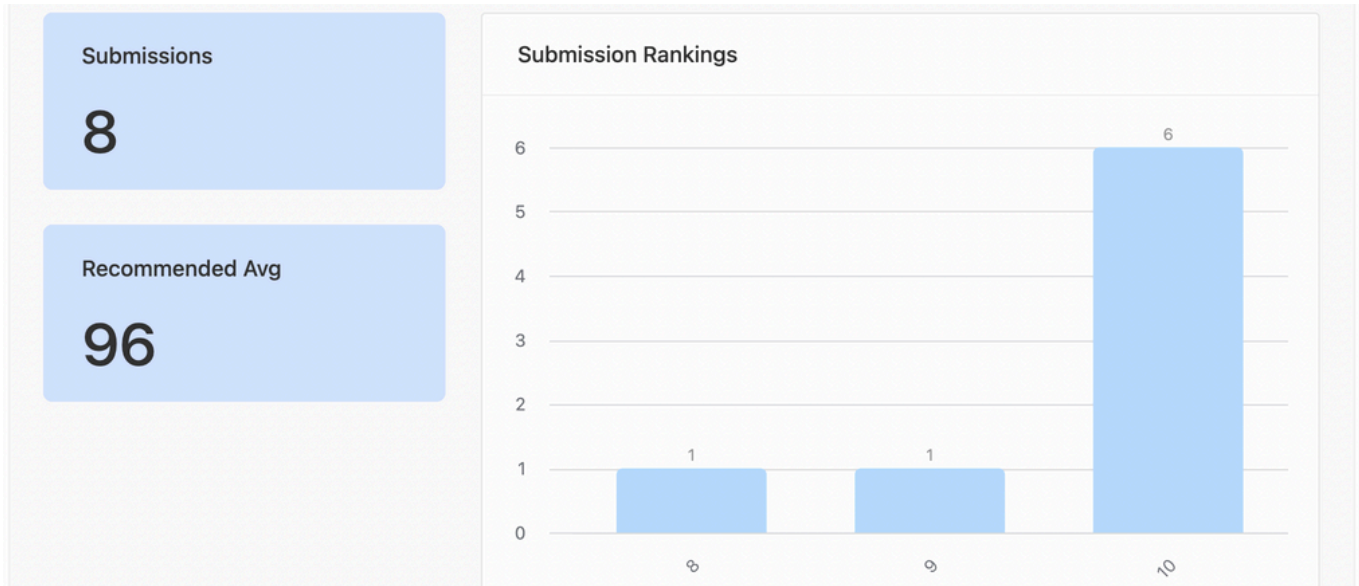
Feedback

"I recently started using Orca for managing my references, and I must say, it's been a game-changer. The platform's user-friendly interface and intuitive features have made the tedious task of organizing and citing references a breeze.

One of the standout features of Orca is its seamless integration with various citation styles and reference formats. Orca ensures that my citations are accurate and consistent every time. The platform's robust search functionality makes it easy to find and import references from a wide range of sources, streamlining the research process.

Overall, Orca has significantly improved my workflow and productivity when it comes to reference management. I highly recommend it to anyone looking for a reliable and efficient tool for organizing and citing references."

POSITIVE	NEGATIVE	HIGHLIGHTS
Flexible & Customizable	Small team	Always working on new features, can embed into any platform.

DEETO

Submissions	Submission Rankings
22	
Recommended Avg	
91	
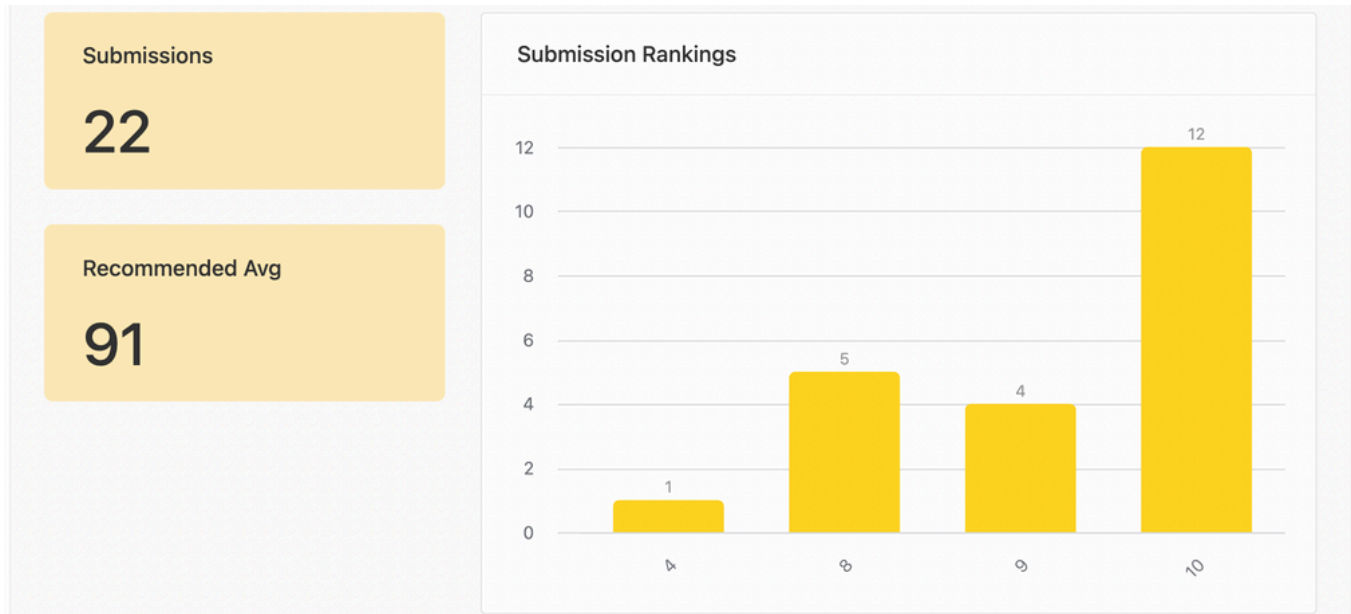
Feedback

"Easy to use. Great end-user experience. Simplifies reference calls (matching, coordinating, reporting) while also generating social proof AND serving as a central hub for all our customer content. I like that it lives outside of Salesforce and I have full control over the settings, but sales can still contribute new advocates and arrange their own reference calls."

"Onboarding was not user-friendly. I felt I was seeking help from the CSM more than I could have done had it been clearer how to navigate the product on my own. Lack of 'how to' videos/guides. Now that I understand the product, its better but it took a long time to get to this point."
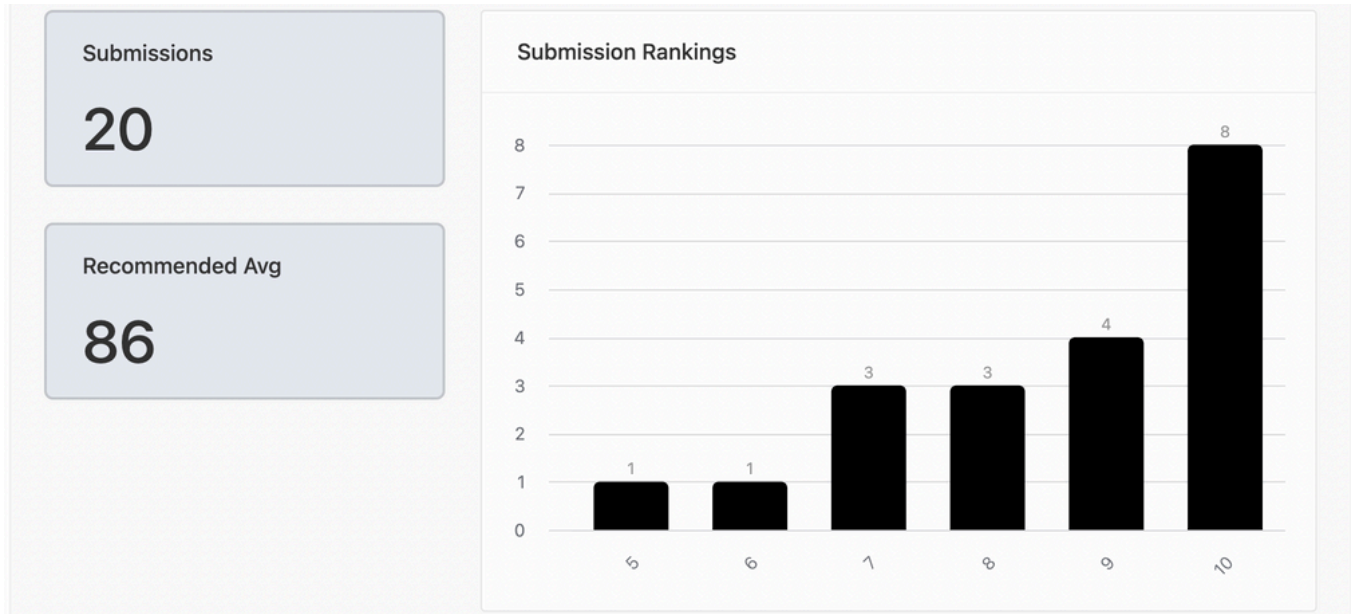
POSITIVE	NEGATIVE	HIGHLIGHTS
Reference program and rewarding.	Lack of branding options.	**Reporting is boosted by AI, Gathers many stories quickly.**

SLAPFIVE

Submissions	Submission Rankings
20	
Recommended Avg	
86	

Feedback

"It's flexible and works with me to implement the needs I have for my platform. I'm focused on destination-less advocacy, so SlapFive really helps me accomplish my objectives for identifying and activating champions and driving referrals."

"My experience with Slapfive was that they occasionally were too focused on the forest to put much effort into the trees. Product-wise, I felt like we were frequently noticing bugs or obvious opportunities for UX/UI improvement, some of which were extremely surprising to have made to production."
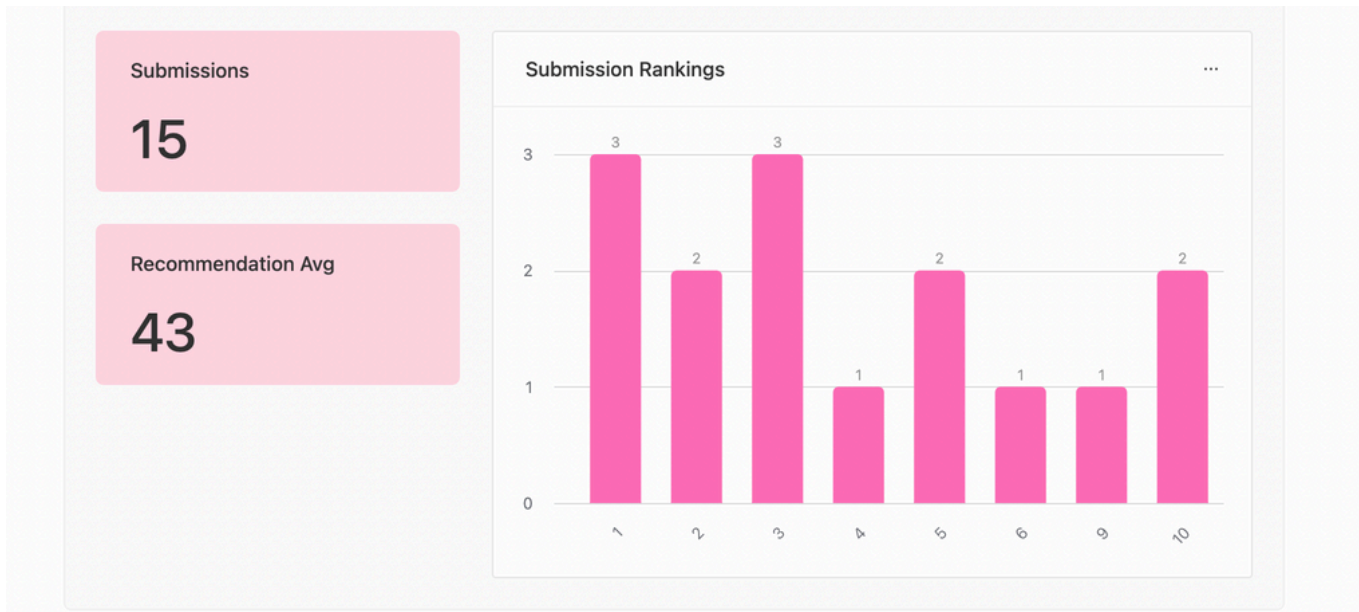
POSITIVE	NEGATIVE	HIGHLIGHTS
Native Video, CRM, Customizable	Less friendly UX	**Feedback constantly mentions extremely supportive staff.**

CROWDVOCATE / BASE

Feedback

"Sold us on features that were not live by the time of implementation. Poor communication between different CSMs and leadership"

"I feel it doesn't meet our needs for reporting and tracking our advocacy program. There is little flexibility to make it your own and it feels old. They promise a lot of things they can't deliver on. It's taken us over a year to feel somewhat okay in the system, but it still does not deliver what we need, especially for our reference program & advocacy tracking."

POSITIVE	NEGATIVE	HIGHLIGHTS
Flexibility, Advocacy & Community	Implementation, SF Integration, Over-Promising	Base Satisfaction has improved over 10% since the 2023 survey

MOST REPORTED ISSUES ACROSS PLATFORMS

Over the course of 2023 and 2024 surveys, multiple obstacles to success were mentioned by users.

Implementation Time: implementing a new platform can take a lot of time. Importing existing program data can cause delays because data needs to be reformatted or cleaned.

Additionally, Salesforce time is necessary as data may need to be reformated and cleaned. Salesforce admins tend to be booked out for months in advance for implementations and updates.

Internal Adoption: if implementation goes well, the next issue could be internal adoption. When you need Customer Success & Sales to change processes it means much habit-building, working together, and championing for your program.

Poor User Experience: One way to overcome the adoption issue is to make sure it's easy to use the platform. Newer technologies in our space do this very well.

Lack of Documentation: Multiple platforms in our space do not offer material for onboarding, training, and adoption, relying on direct connection with the CSM to ensure success. This means it takes longer to implement as you have no choice but to work with their schedule.

INFLUITIVE ALTERNATIVES

Several Influitive customers are revisiting the marketplace to see what platforms can manage their programs.

I suggest you keep areas in mind when comparing solutions Influitive & to ask yourself the following questions:

Advocacy	Community	Gamification

Rewarding	Support

✓ Are my most valuable and productive advocates using the platform?

✓ Do my gamification efforts create productive advocates or do I see a lot of transactional redemptions (from one/two time users?

✓ Are customers active in the forum or would a different community program perform better (such as roundtables)?

✓ Do my customers want to be on another platform or will a simpler platform work?

✓ Is the price of a new platform comparable to the features and functions available on Influitive?

See a Full Breakdown of
Comparable Influitive Alternatives

Thank You

Champion

For supporting Customer Marketing & Advocacy Professionals @ CMAweekly

Support Our Amazing Sponsor By Booking A Demo Today