Best Practices for Customer Reference Calls

- **Follow the standard procedures that have been outlined.** This includes using Salesforce-native ReferenceEdge to request references.
- **Don't request references too early** in the sales journey; wait until at least Stage 40.
- **Use content to run interference** when possible.
- **Don't pull in marquee references** unless warranted.
- **Don't request multiple references when one would do the trick.**
- **Don't overuse or misuse** customers.
- **Give customers (and CSMs) adequate time** to respond. A minimum turnaround time of 7 days is needed for reference requests.
- **Don't ask for a call to be arranged unnecessarily.** (And circle back with the customer and the CSM if a planned call is no longer needed.)
- **Understand (and convey in advance) the topics and questions** that the prospect (or other customer) expects to cover on the call.
- **Close the loop** with any customer who has agreed, and **thank them** after the call takes place.
- **Provide details about how the call went via the automated ReferenceEdge process.**
- **Ensure that CSMs are aware** of every reference activity their respective customer(s) participates in.

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