



FIELD NOTES / 02 / CUSTOMER REFERENCES

Your best customers are not your sales team.

Build a reference programme that answers buying questions without wearing out the people who already pay you.

WHAT YOU WILL DO

Use customer references to answer a specific buying question. Match the experience, ask before introducing and give one person responsibility for every request.



SOURCE



INSIGHT



APPLICATION

ARTICLE / FILLABLE WORKSHEET / SOURCE NOTES

Stop asking the same customer for another favour.

If you lead sales or customer success, look at your last reference request. Did the buyer have a question only another customer could answer, or did the salesperson want someone credible to rescue a vague deal? A reference call asks an existing customer to give you their time and reputation. “Can you tell them we’re great?” is a poor brief.

Here is a fictional example. A SaaS buyer wants to know how much work implementation will require from its small operations team. The salesperson asks your most enthusiastic customer to take a call. That customer uses a different integration and has a dedicated implementation team. They may love you. Their experience may still fail to answer the buyer’s concern.

Our recommendation is to run a small, deliberate reference programme. Its job is to connect a specific buying question with someone who can speak honestly from relevant experience. It is not a free extension of your sales team. The customer should understand the request, choose whether to help and be able to decline without your account team making it awkward.

Make the salesperson do the preparation.

Before asking a customer, write down what the buyer needs to establish and what decision follows the answer. Check whether a case study, implementation plan or a conversation with your own delivery team could settle it. A reference is useful when firsthand customer experience matters. It should not replace product explanations, commercial negotiation or work your company owes the buyer.

In our fictional deal, the question becomes: what internal work did a similar operations team need to complete before launch? The buyer’s operations lead will attend. If the conversation clarifies the effort, that person will prepare a resourcing plan for their finance sponsor. That is a reason for the call. It is still not a promise that the prospect will buy.

Match the question to the customer’s actual experience. For an implementation concern, relevant integration, team capacity and rollout experience may matter more than a famous logo. Check with the account owner that the experience remains current and the relationship is healthy enough for the request. Do not approach someone with an unresolved service problem and ask them to perform enthusiasm.



Give one person control of the requests.

Appoint a coordinator who can see requests across sales and customer success. Keep a small register: topics each willing customer can discuss, named contact, agreed frequency, last request and any restrictions. Ask what level of involvement suits them. A reference call, a public quote and a reusable recording are different requests. Agreement to one does not cover all three.

The coordinator checks availability before making an introduction. Explain who the buyer is, the question, the proposed duration and who will attend. Let the customer decline or suggest another format. Do not share contact details, record the call or reuse comments beyond what was agreed. If participation involves an incentive, make that arrangement clear; do not buy praise and present it as independent opinion.

Give both parties a short agenda. Let the customer describe difficulties as well as benefits, and avoid coaching them into a sales script. Afterwards, thank them and record the request. Ask the buyer what remains unresolved. If the answer exposes a real fit problem, deal with it. Pressuring the customer to soften the answer would defeat the point of asking.

Use a reference brief, not another spreadsheet of fans.

The worked brief for our fictional deal is specific. Buying question: implementation effort for a small operations team. Buyer and next decision: operations lead prepares a resourcing plan for finance. Customer match: someone with comparable team capacity and integration experience. Customer agreement: one half-hour call, agreed attendees, no recording. Coordinator: the customer marketing manager. Follow-up: log the request and ask what the buyer still needs.

Review the register for repeated demands, declined requests and questions you cannot match. Check whether the programme supplies relevant conversations without overusing a few generous people. Keep eventual deal outcomes separate from claims about what caused them: a sale after a reference does not prove the call won it. If you cannot offer a suitable reference, say so. Your best customers already pay you. They do not owe you another bloody sales shift.



Brief one useful customer-reference call.

Complete this before approaching a customer. If the buying question or next decision is vague, fix that first.

Type into the fields, or print. Save a copy to retain your answers.

01 The buying question

What does the buyer need to learn from firsthand customer experience?

02 The buyer's next decision

Who will attend, and what will they decide or do after the answer?

03 The customer match

Whose team, use case or implementation experience fits the question?

04 The customer's agreement

What time, attendees and use of comments has the customer agreed?

05 The coordinator

Who checks availability, recent requests and the introduction?

06 The follow-up

Who thanks the customer, logs the request and checks unresolved questions?

Arrange the call only when the question is clear, the experience fits and the customer freely agrees.



Read further. Know the limits.

SOURCE 01 / PRACTITIONER INTERVIEW PUBLISHED BY AN INVESTOR

The GTM Inflection Points That Powered Clay to a \$1B+ Valuation

First Round Review; interview with Varun Anand / First Round Review / 23 January 2025

Historical background retained from the earlier edition on customer experts. This investor-published Clay interview is not evidence for the customer-reference programme proposed here. No Clay programme, causal outcome or current practice is asserted in this rewrite; no current support recheck was performed.

<https://review.firstround.com/the-gtm-inflection-points-that-powered-clay-to-a-1b-valuation/>

OUR GUIDANCE. YOUR COMPANY'S NUMBERS.

The article and worksheet are original GTM Architect guidance. References above are background reading, not proof that our proposed approach will produce a particular result. Source dates and limitations are preserved.

Rewritten 6 October 2026. Worked examples are fictional and use illustrative assumptions, not industry benchmarks. Named companies and publishers have not endorsed these guides.

Use the worksheet with one real task, deal or customer. Replace the example assumptions with your own information before acting.