

# Customer Success Story and Testimonial Process

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Department: Marketing, Sales, Customer Success

## 1. Objective

To systematically identify, secure, and publish customer advocacy content that validates NixaCore's value proposition and assists in the sales conversion process.

## 2. Advocacy Tiers

Tier	Description	Requirements	Usage
<b>Tier A (Full Case Study)</b>	Detailed document or video with named client, specific metrics, and executive quotes.	Signed <b>Case Study Release Form</b> required.	Website feature, high-value sales collateral.
<b>Tier B (Named Quote/Logo)</b>	Permission to use the client's name/logo and a general quote.	Verbal or email confirmation from authorized client representative.	Pitch decks, internal training.
<b>Tier C (Anonymous Data)</b>	Permission to use anonymized data/metrics (e.g., "A global bank reduced risk by X%").	Standard MSA clause usually covers this, but confirmation of anonymity required.	Blog posts, white papers.

## 3. Process Flow

- Nomination:** Sales or Customer Success (CS) submits a successful customer to Marketing (based on high usage, renewal, or strong ROI).
- Vetting & Outreach:** Marketing confirms the project details and initiates a formal

- request for advocacy permission via the Sales/CS Account Owner.
3. **Content Creation:** Marketing conducts interviews and drafts the content, securing review and final sign-off from the client's authorized contact.
  4. **Publishing & Reward:** Content is published. The client contact is thanked with a reward (e.g., [USD \$500] donation to their charity or a premium gift).

## 4. Legal Compliance

A fully executed **Case Study Release Form** is mandatory for all Tier A content and must be filed with Legal before publication. All metrics used must be verifiable.