

If your customer evidence efforts feel reactive—or totally ad hoc—you're not alone. This weekly checklist lays out a simple path forward: what to focus on, what to create, and how to make proof points easy for GTM teams to find and use. No more chasing down "one-off" case studies. You'll build a steady stream of proof that scales.

Need to dive deeper into any of these checklist items? Click on the section header to jump directly to an in-depth blog post that gives you step-by-step guidance.

Note: If you're using UserEvidence to build your customer evidence library, many of these steps are done for you in-platform. The steps already built within the UserEvidence platform will be noted with a *****

Weeks 1–2: Laying the Foundation

Week 1: Define Your North Star & Identify the Evidence Gap

- Align with company priorities (OKRs, strategic initiatives, key launches).
- Interview stakeholders in sales, marketing, and CS using this <u>"Finding Your</u> Evidence Gap" worksheet.
- Identify where buyer needs \neq current customer evidence.

Week 2: Audit What You've Got

- Catalog existing evidence: type, industry, persona, use case, date, strength.
- Identify coverage gaps and opportunities.
- Identify where your evidence library will live (Google Sheet, Notion, UserEvidence)

Output: Completed Finding Your Evidence Gap worksheets

Weeks 3–4: Planning & Quick Wins

Week 3: Choose Your Starting Path (Census or Focused Project)

- Select a quick-win initiative (e.g., competitive battlecard, new feature launch, census survey).
- Design your first survey (census or targeted).*

Resources: <u>7 survey templates ready for you to use</u>

Week 4: Launch Survey + Build Strike Team

- Distribute the survey via CS, marketing email, or in-app prompts.
- Recruit 2–3 internal champions for feedback and momentum.
- Create training materials (guides, videos, examples) that will help enable your team on how to use the new evidence you're sourcing.

Output: Survey in market, internal advocate "strike team" briefed, training materials prepped

Weeks 5-6: Early Collection & System Setup

Week 5: Analyze Survey Results

- Start reviewing early responses.*
- Identify high-potential quotes, ROI stats, and advocates.*

Output: Top survey insights + curated shortlist of strong evidence.*



Week 6: Organize Evidence + Start Creating Assets

- Build your customer evidence library in the previously-identified platform of choice (Google Sheet, Notion, UserEvidence)*
- Set up tagging system by industry, persona, feature, etc.*
- Begin turning raw responses into usable stat cards, testimonials, etc.*

Output: 3–5 branded, high-impact assets created.*

<u>Weeks 7–8: Expand, Curate, and Systematize</u>

Week 7: Build Your Evidence Library

- Begin inputting new evidence into your already-built library.*
- Create collections (by use case, persona, competitor, industry).*
- Start identifying customer advocates from prior responses.*

Output: MVP customer evidence library ready to share internally.*

Week 8: Begin Soft Rollout to Sales & Marketing

- Introduce library to your strike team and other key stakeholders.
- Provide training and 1-pagers with usage examples.

Output: Sales enablement materials + initial feedback from users.



Weeks 9–10: Operationalize & Measure

Week 9: Expand Evidence Types & Surveys

Launch second survey (e.g., win/loss, competitive, onboarding).*

Output: 7 survey templates ready for you to use

Week 10: Track Early Impact

- Begin monitoring usage (how and where assets are used).
- Report on early wins (e.g., AE who closed deal using ROI proof).

Output: Metrics dashboard or report draft showing early success.

Weeks 11–12: Institutionalize & Optimize

Week 11: Full Rollout & Team Training

- Hold team-wide training and Q&A.
- Launch "Evidence of the Week" spotlight via Slack or email.

Output: Full org awareness + rollout guide shared internally.

Week 12: Feedback Loop + Long-Term Planning

- Collect internal feedback from Sales, CS, and Marketing.
- Document learnings, future gaps, and long-term roadmap.

Output: 6-month roadmap + retrospective summary.



Bonus: Ongoing Maintenance (Post-Week 12)

- Quarterly audits to refresh outdated assets.
- Monthly "voice of customer" briefs from recent survey data.
- Always-on surveys triggered by lifecycle events (e.g., post-onboarding, postrenewal).*

Want to see why teams at Gong, Splunk, Grammarly and more choose UserEvidence to build and scale their customer evidence programs?

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Asset Types v All Industries	V All Company Sizes	✓ Al Seriority	V Al Roles V
Excellent Call Monitoring Tool I like the insights that Gong gives after each call. There are hings that I have inspiremented that have helped me to mprove the conversation flow, I also ge feedback from my caches to improve in my sales role. I like the longevity of the lime that the calls are stored for review and the transcription	© 6006 In a few sentences, please describe the impact Gong Engage has had on your organization. Please use metrics and specific numbers where applicable. Some metrics to consider are email reply rate, impact on sourced pipeline per rep, impact on sales cycle length etc.	GONE Since implementing Gong, have you noticed an improvement in your sales performance, KPI performance, or other qualitative or quantitative results? Please describe. 'I think our roadmap has been better aligned to prospects. We also adjusted our OTM to focus on higher win rate	CONG Since implementing Gong, have you noticed an improvement in your sales performance, KPI performance, or other qualitative or quantitative results? Please describe. "Yes. I've been able to deliver coaching on client calls that my team has been able to action which has helped drive better
portion of them the calls as well. That is helpful in script evisions and rebuttals composition. The user interface is very easy to navigate and is not cumbersome at all."	to feel clear headed as Gong Engage takes care of "remembering" for me - which in turn allows me to focus on outreach. The recording feature has been incredible as I no	segments based on 1) call reviews and 2) closed rate details"	engagements."

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