

Closing The Evidence Gap

It's time to fix the disconnect between marketing and sales. Here's how we scale proof points at UserEvidence to win buyers' trust.



HEY, I'M ALEX.

Director of Product Marketing at UserEvidence, and author of this guide.

I've been in product marketing for almost a decade for companies like Lessonly (acquired by Seismic) and Help Scout, and am now building it at UserEvidence, so I know firsthand that our day-to-day is spent fielding Slacks from sales that sound something like this:

"Do we have a story in fintech? Working a deal and I need one to keep it moving."



"Do we have any proof of ROI for a customer in cyber? My prospect got asked by their boss for it."

"Do we have new customer stories on the docket for this quarter? I feel like our current ones are getting stale."

Sound familiar?

As annoying as these broken-record phrases are to us, they come from a place of real pain for our sales teams. In our **recent original research**, we uncovered that

67%

of sellers reported that a deal of theirs had suffered or slowed down because they couldn't produce relevant, specific customer evidence in time.

The pain is real – and it's **impacting your company's pipeline**.

I know firsthand that you spend hours, whole quarters even, working to gather case studies, customer stories, and testimonials in order to create resources that help different functions on your GTM team win. Then...it sits. And whether it's your fault or not, it doesn't reflect well on you, and it certainly doesn't help your team.

But here's the hard question we have to ask ourselves: are we taking the time to capture the *right* customer evidence, and then deploy it intentionally?

A super power I've unlocked as a product marketer is prioritizing putting as much (if not more) process and intention behind smaller, specific proof points as I do those white-whale case studies.

The reason?

Buyers aren't one-case-study-fits-all anymore. According to our original research report The Evidence Gap,



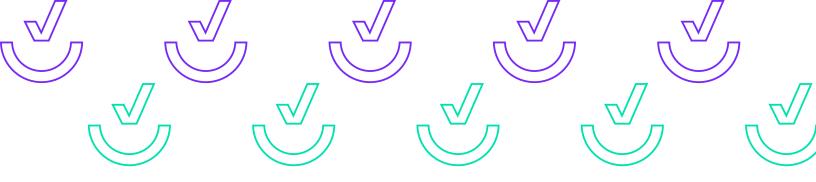
of buyers consider a compelling, statistically significant ROI business case crucial to their buying decision



of those same buyers said they emphasize the importance of that business case being relevant to their industry.

That means we need more diversity of data, and surveys are by far the most effective way to scale the data we can put in our sales team's hands.

That's why in this guide, I'm going to divulge every secret we have gathered up here at UserEvidence for how to create and conduct crazy-effective customer surveys, and then (the most important part, IMO) effectively mine for proof points and intentionally deploy them to your sales teams, so your hard work gets used.



So, here's what we'll cover today:

How to identify the data your sales team actually needs

| Conducting internal interviews to pinpoint the need | 7 |
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| Building a survey schedule to get the proof points you need | 9 |
| Planning for enablement so your stuff gets used | 11 |

How to effectively and efficiently capture proof points

| Email best practices + examples that have actually worked | 14 |
|---|----|
| Incentives that actually work + how to not get in trouble | 16 |
| Survey question templates + examples for different survey types | 17 |

How to effectively deploy proof points to your sales teams

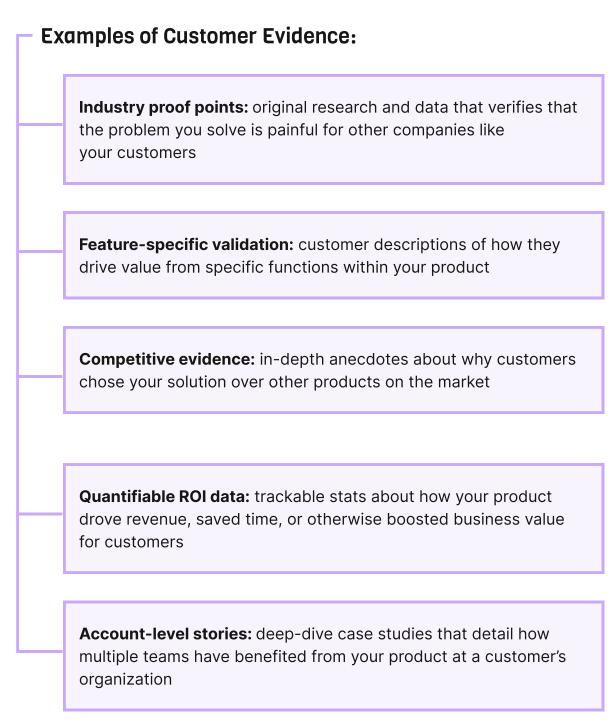
| Which assets to create + examples of what "great" looks like | 23 |
|--|----|
| Tips for making sure the sales team uses your assets | 28 |

A few things before we dive in

We use a couple of terms around here that deserve a little extra explanation:

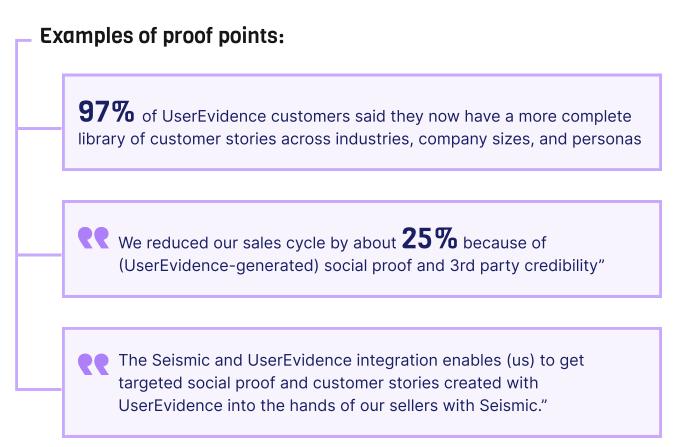


Statements or statistics, straight from verified buyers, that prove the value of your product or service.



Proof points:

Individual pieces of data that prove the value of your product or service.



In this guide, we'll be sharing our process for capturing **customer evidence** at scale, that you can then turn into hyper-relevant **proof points** for your sales team to use.

How to identify the data your sales team actually needs

All right, I get it. We've all just agreed that we're annoyed with sales' constant requests and needs.

But let's flip this on its head.

Put yourself in the *buyer's* shoes for a moment.

Think about what's on the line when you champion a new tool for your company. If you convince your team to invest tens of thousands of dollars (sometimes more) on this new tool, and it doesn't do what the rep said it would do while you were having all of those pie-in-the-sky sales conversations...you've just cost your company that investment (plus the cost of your – and any other stakeholders' – time), and potentially...your own job.

If there's risk, doubt, or worry, the odds of you going through with a purchase that large are minimal, at best.

So what can sellers do to mitigate that risk, doubt, and worry?

Present ROI-based proof points.



So the place we need to start when creating an arsenal of customer evidence for your sales team is to ensure you're creating **the right** proof points that will keep their most impactful deals moving forward.



To identify the Evidence Gap within your organization, there are a few steps to follow:

Conduct internal interviews

It doesn't do you any good to create in a silo. That's where our original pain came from, after all, isn't it?

Creating the stuff we **think** is needed leads to our hard work gathering dust in a forgotten G Drive folder.

There are some areas that are **very clear** indicators that you've got an Evidence Gap within your organization.

A few we see often are:

Where to search for your Evidence Gap

- Leaky funnel: is there a part of the sales process where deals are slipping?
- Sales qualitative feedback: is your sales team constantly asking for different or new customer stories?
- Competitive deals: are we losing to one in particular or because of one particular thing?

This is a perfect place to start with sales leadership. Grab some time with your most impactful sales leader(s) and ask them the following questions to get to the root of those common issues:

Ask your sales leader

- What proof points are missing in our current deals?
- Where are deals stalling? Any patterns you've noticed?
- Are we facing challenges with certain competitors? Regions? Industries?

Then, get on the ground level and talk to the reps in the trenches. It would be helpful to get a quick pulse from leadership on which reps can speak most helpfully on these topics.

Ask leadership for the names of 2-3 reps you can ask the same questions to (Pro tip: I always recommend developing your own 'strike team' of 2-3 reps you are tight with and trust for trying things out and gather feedback across the board.)



One note to remember: you're not as in the trenches as your sales team. So, in this process, **you should serve as the strategic visionary.** You'll need to consider some recency bias, and ensure that the leads you're following aren't just flash-in-the-pan initiatives that are top-of-mind for sales. One way to round out your questioning is to ask these questions to leadership outside of sales too – maybe your CEO or VP of Marketing.

Once you've conducted these internal interviews, you'll likely start to see some patterns emerge.

Man, we're really struggling to break into EMEA.

Cyber is a tougher industry to break into than we would have imagined.

I feel like we lose a ton of momentum after the discovery call.

These insights will point you to your Evidence Gap.

You may need to put on your detective hat and do a bit of extra sleuthing, but these leads are crucial to figuring out what sort of proof points can help move these deals forward. Here's what that initial detective phase might look like:

Man, we're really struggling to break into EMEA.

I wonder if they're worried about support since we're in a different time zone. Maybe we need some more proof points around overall customer experience and satisfaction for our overseas customers.

Cyber is a tougher industry to break into than we would have imagined.

Cyber is a tight-lipped industry, and we haven't been able to source any comprehensive case studies that prove we're helping others like them. Maybe some ROI data from the aggregate of our cyber customers would be impactful to earn that trust.

I feel like we lose a ton of momentum after the discovery call.

Maybe they're not feeling urgency because they don't see the value. I bet if our sales teams followed up with some Verified ROI based on the buyer's industry or use case, they'd feel a bit more urgency to keep the conversation going.

Now, we've got some insights to where our biggest Evidence Gaps exist.

Build your customer evidence engine with a survey schedule

The overwhelm is real when it comes to surveying.

This is especially true in high-pressure situations when sales leadership is panicking about deals stalling or being lost and is looking to you for the quick fix.



I've been there, and I feel it. The big question – *where do we even start?* – is, ironically, where many give up. Because the possibilities of who to survey (and how to survey them) are pretty much endless.

But the great news is that we just solved that problem together. Those Evidence Gaps you just uncovered? They now hold the key to answer that exact question.

You start where the gaps exist.

While we definitely recommend starting big with a census survey to capture as much customer evidence as possible, if overwhelm is something that's holding you back, a more focused survey could be the better option for your team.

More focus = more impact

And we can't forget that **61% of buyers are looking for proof of vendor success for similar customers** (based on factors like industry, company size, and use case) – so nailing some of the proof you need to stand out in those niches is worth its weight in gold.

So, here's what a sample survey schedule could look like if we use the same three examples we shared earlier, knowing that breaking into a new international market is a (realistic) key outcome for 2025:

| Timeline | Audience | Key Results |
|--|----------------------------------|--|
| 2025 Q1 | International Customers | Customer Experience Support Experience NPS |
| 2025 Q2 | Census (all customers) | Verified ROI - total impact of our product on their business |
| 2025 Q3 if needed after Census | Cyber Customers | ROI data |

Sample survey schedule for 2025

Here's a peek behind the curtain at how we came up with this schedule based on our Evidence Gaps + strategic priorities:

We start with a survey of the International customer base because that will support a company-wide annual initiative to break into the EMEA market. We need that specific data ASAP to support sales in those aggressive goals. Then, we'll turn our energy to a census survey to gather as much Verified ROI as possible, hoping it'll get some good industry-specific results that our sales team can share with that tricky Cyber buyer. If not, we'll tackle that evidence gap with an industry-specific survey of our Cyber customers, with some additional incentives to hopefully pick up some of the more hesitant customers who didn't partake in the Census survey.

Evidence Gaps + Strategy = Your Survey Schedule

Don't *hope* it gets used by sales-plan for it

Before it's time to create and conduct your survey, there's one crucial step that often gets overlooked:

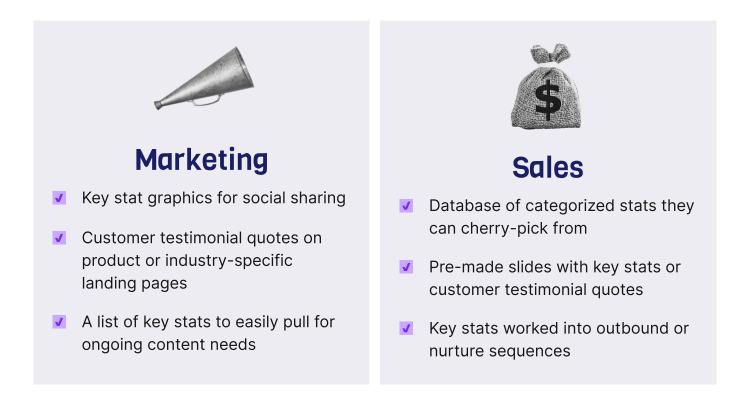
How are you going to deploy this to your sales teams?

Look at the key results you hope to capture with each survey. Now, imagine your world in three months. The survey is completed. You got amazing stats that your sales team will drool over.

So...how will they want to use them?

You'll need to develop a proactive plan for using the data you gather from your surveys.

Two teams will want these stats the most: Marketing and sales. Here are a few ideas to consider for how your teams may want to use the survey data:



This is another area where asking these teams for guidance and then using your own strategic decision-making will be useful.

Again, you don't want to create great content that won't get used. So make sure you're asking the right questions to the right people to ensure everyone is aligned.

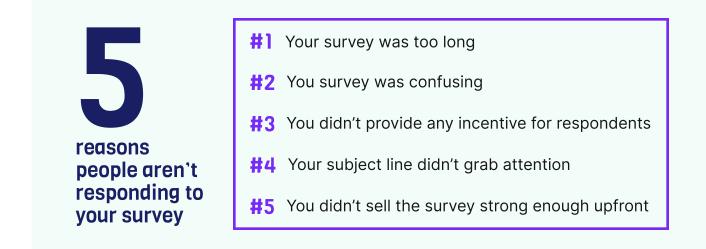
You may be wondering: "We haven't even created the survey yet...why are we already planning out a slide for the non-existent stat?" Fair, but I promise this is the perfect time to think through these things. The earlier you can get agreement from your sales team that, yes, this is the data they need and, yes, this is the format they want it in, you can know that the rest of the heavy lifting you're about to do to create and deploy this survey will be worth it for all parties involved.

How to effectively and efficiently capture proof points

The Evidence Gaps have been found. The game plan to get some valuable proof points is drafted. Now, it's survey time. Here are some guidelines and best practices to make sure your survey gets the proof points you need – and, more importantly, doesn't end up sitting unread in your customer's inbox.

Surveying best practices

Here are the top five reasons surveys don't get results:



If you want a full breakdown of each of these reasons, **we've got that for you here.** But before you get too in the weeds, I think it may be helpful for us to just flip this on its head. Here are the things you need to nail in order for your survey to get results:



The ask

One of my biggest marketing soapboxes is that we're losing the art of storytelling. (I won't go full soapbox here, but hear me out...)

If your buyers don't understand the **why** behind the survey – if you don't tell them the story of what it means for them – then they simply won't bother.

That's why the way you ask matters so much. If you're not commanding attention – and then giving them the **what's in it for me** very explicitly – your hard work is doomed.

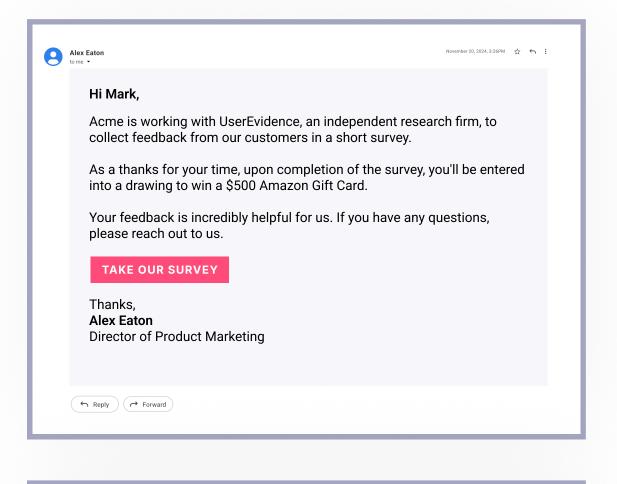
A few best practices we love to use at UE:

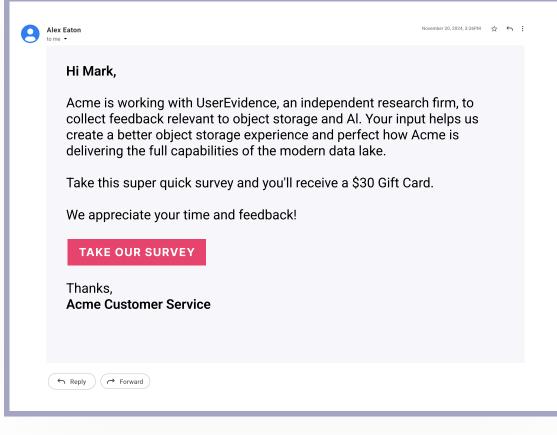
Personal ask: Have the ask come from the person at the company they interact with most regularly. Were they really actively communicative in the sales cycle? Have the survey come from their AE. Do they hear from their customer success manager regularly? Send it from there.

Tell the story: Look, we're all human, so we can admit that we're all a bit selfish at our core. The "what's in it for them" is super important here. Make sure you tell the story

Nail the subject line:

The average corporate worker sends and receives **121 emails per day.** Which means you'll need to stand out in their inbox.





The incentive

OK I'll be the first to admit it so you don't have to: sometimes the story isn't enough to sell me. I'm busy. When I see a survey request come through my inbox, the **what's** in it for me needs to be more...literal.

If you want results, it's worth throwing some budget at your survey initiative for an incentive.

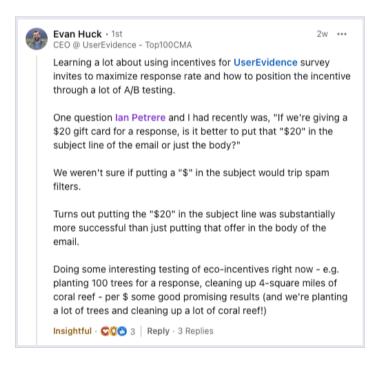
Having conducted dozens and dozens of surveys at UserEvidence, we've found a resounding answer for what incentive works best:

Cold. Hard. Cash.

We started with a \$25 Amazon gift card for our base user surveys annually, and scale that up as much as we need to for more targeted surveys.

We've also been experimenting with some other cash-based incentives, like ecoincentives, and have seen some promising early results

(Here's a recent comment from our CEO Evan on those initiatives, plus some stellar insights on subject lines:) .







A VERY important note: The **FTC recently ruled** banning fake reviews and testimonials – punishable by **up to \$50,000 in fines** (yikes). Included in that ruling is the prohibition of "buying of positive or negative reviews". We'll put the fine print below for you to read for yourself, but what this means is that you need to be **very** intentional about how you position your incentivized ask. Be clear and concise in saying that they'll receive the incentive in exchange for an **honest** review.

The fine print: "Buying Positive or Negative Reviews: The final rule prohibits businesses from providing compensation or other incentives conditioned on the writing of consumer reviews expressing a particular sentiment, either positive or negative. It clarifies that the conditional nature of the offer of compensation or incentive may be expressly or implicitly conveyed."

The questions

of the most effective survey templates

No need to bury the lede – if you just want to steal our templates, we've got 7 of the most effective survey templates right here.

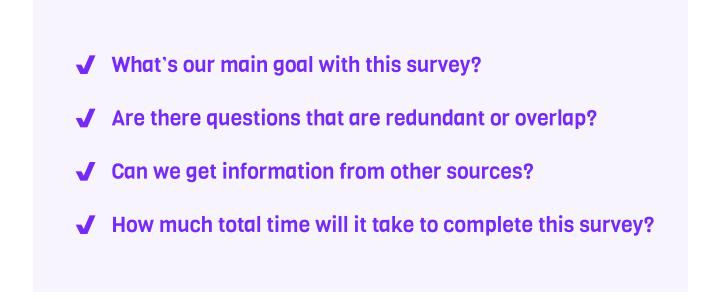
We'll cut to the chase here: the V1 of your survey is probably too long or too complex.

Best practice for survey length is within the 5-13 question range.

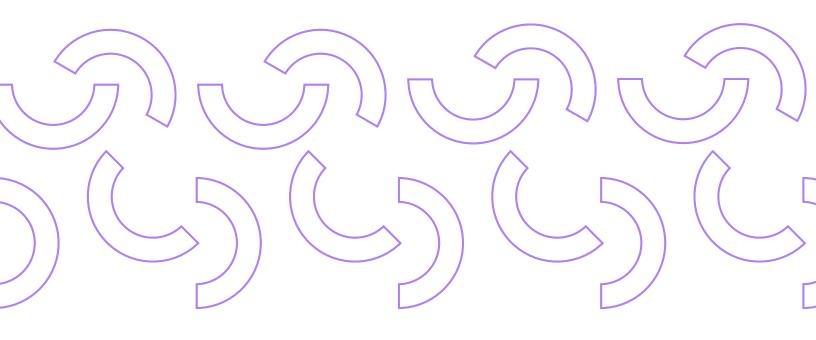
It's also important to consider the question type. Having more than 3 "testimonial" questions, for example, can cause people to abandon your survey because it's just too much.



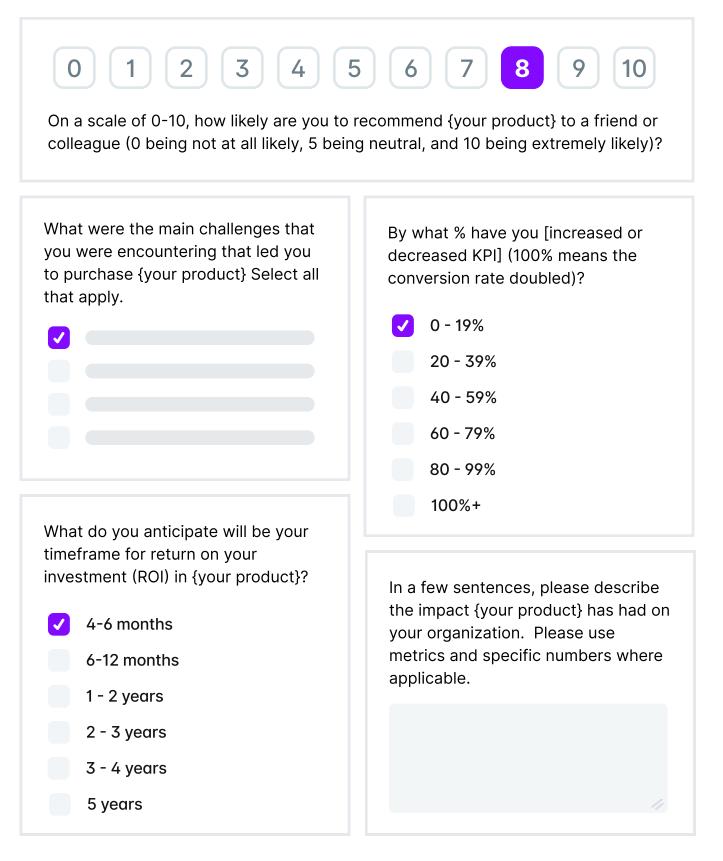
Remember: Every survey should be as short and relevant as possible. Some questions to help guide you when you're whittling down your questions:



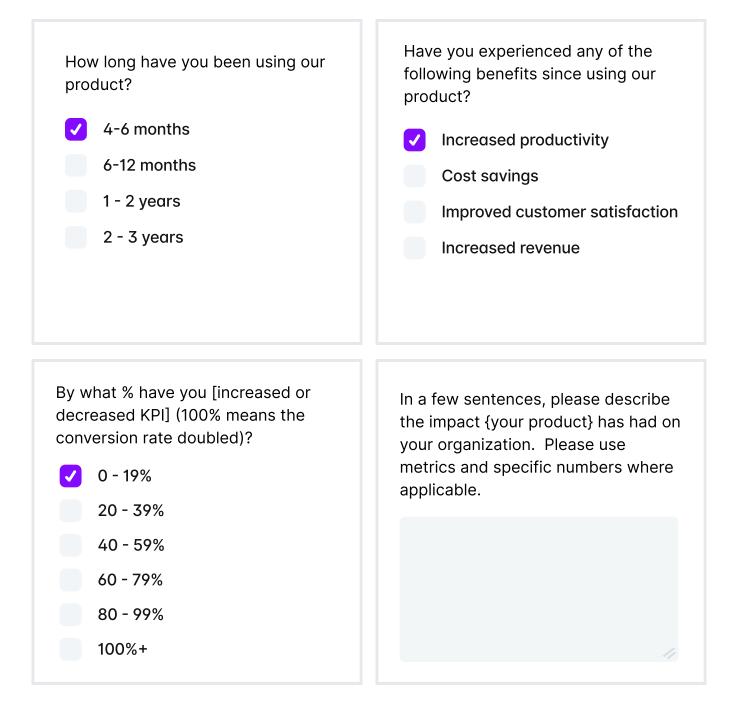
After you're done refining, take it for an internal test run. Ask a couple of people on your team to mock-fill it out, and ask them where they got confused, where they got stuck, or where they were tempted to abandon ship.



Sample census survey questions (Goal: ROI data)



Sample industry-specific survey questions (Goal: ROI data for specific industry use case)



Sample competitive survey (Goal: Competitive story)

Which of the following factors influenced your decision to choose {your product} over competitors? Select up to three. Have you experienced any of the following benefits since using our product?

| < | Reliability |
|---|--------------------------------------|
| | Performance |
| | Ease of Use |
| | Customization |
| | Integration with other tools/systems |

In a few sentences, please describe the impact {your product} has had on your organization. Please use metrics and specific numbers where applicable.

How to effectively deploy proof points to your sales team

The plight of the product marketer is creating great content that nobody uses.

The hamster wheel of *create, create, create* really never stops for us – there's always a new slide, new one-pager, new battle card that needs to be created *right now*.

And with all of that reactive urgency, there's always something new to work on. Which means once that last thing is finished, it gets shot off to the person who needed it, and then...

...it's totally forgotten about...

...until 3 weeks later when someone else on the sales team comes to you needing that exact thing, and you're left passive-aggressively Slacking smiley faces and cursing the labyrinth that is your org's Google Drive because *why can't anybody find this stuff on their own?*

If you're a normal marketer, the buck usually stops before you even get to the whole "deploying" part. You put in all the hard work gathering the customer evidence your teams so desperately need, and then...you get bogged down with a million other requests, needs, and product launches.

But you, friend, are not a normal marketer. You're a marketer who planned ahead, and is going to effectively get your proof points into the hands of your sales team. And – most importantly – help them win more deals. (AKA – you'll be the first marketer that sales actually loves.)

Effective sales assets

We have a few favorite (and most effective) assets to create using your new-found proof points. And, with each of them, we'll be sharing some tips for maximizing their effectiveness (both with UserEvidence or without):

Sales deck slides

What they are: On-brand slides that feature ROI stats or powerful customer quotes that speak to the value of your solution.

Tips for everybody: The most effective way to ensure your sales teams utilize these slides is to create them, categorize them, and put them where they can easily access them. Most teams we work with use a SAM (sales asset management) or a sales enablement tool like Seismic or Highspot – and having multiple slides that speak to multiple use cases or value props at the ready in the system your sales team already uses daily is a surefire way to get the mileage out of those precious slides.

Tips for UserEvidence users: If the customer evidence is in your UserEvidence library, it can become an on-brand slide in seconds. And, because it's so easy...our best tip? Create liberally. Export as many compelling ROI stats into slides as you can, and upload them to your sales enablement tool so your sales team can access with ease. The more niche ROI you're able to provide (industry-specific, competitor-specific, etc.) the more likely your buyer is to trust and move forward.

Inspiration



Being able to export our testimonials straight to branded slides saves our team hours of manual work. We're often working on new proof points for sales decks and this helps us personalize our sales calls easier than before.

Jarod Greene CMO, Vivun



IMPROVING SALES PRODUCTIVITY 19% 18% 18% Increase in opportunities created Increase in Revenue from Customers Increase in Net-New Revenue 16% 14% 14% Increase in Pipeline Generation Increase in Win Rate Increase in Deal Size spark Source: Highspot Custor ers - Ini rEvidence Stud

Trusted by leading companies

The Netskope Intelligent SSE platform enables hybrid work, redefines risk management and data protection, and simplifies operations.



02 - 03

"

Netskope provides a globally available security cloud for securing and managing remote workers' access to websites and cloud applications, while seamlessly and securely connecting remote workers to private applications using Zero Trust Network Access."

Information Security VP/Executive Medium Enterprise Wholesale Distribution Compa

> "I constantly get **emails of excitement from our Sales staff** when they get a notification that someone viewed their file. Showpad allows us to **take the guess work out** of sales."

> > RYAN WHEELER Sr Manager, Marketing Automation, Sodexo

Showpad



Key stat graphics

What they are: Made-for-sharing graphics that call out key ROI stats that tell your value story at a quick glance.

Tips for everybody: If you did a census survey, these are a must. Pull your top ROI stats that paint the value picture at a high-level and have your graphic design team put them in a bold, on-brand graphic that can be shared on social media. These are awesome resources for reps to have on-hand so they can keep up their LinkedIn presence (social selling is still very much a thing).

Tips for UserEvidence users: Any of your ROI stats can be turned into onbrand, ready-for-social graphics in seconds. Give your reps viewer-only access to your UserEvidence customer library so they can find and export their own onbrand graphics to share in their social posts and emails. Bonus: Give your social media manager access to your UserEvidence account so they can find the stats they need for the content they're creating any time, and export ready-for-social graphics without any intervention from you, a graphic designer, or a team of freelancers.

Inspiration:

What features of the Cloudwords platform are most beneficial to you in your role?

39%

Ability to connect to existing systems through integration (e.g. Marketo)

77%

Collaboration workflow with multiple reviewers and teams

18%

Ability to leverage existing content with OneTM

59%

Ability to see both source and translated content side-by-side with In-Context and Line-by-Line review

🔮 UserEvidence

😣 cloudwords

Cloudwords

of Cloudwords customers increased their **ability to produce** localized content at least 2X

🤳 UserEvidence

97% of UserEvidence customers said they now have a more complete library of customer stories across industries, company sizes, and personas

🕹 UE verified

uevi.co/6437CKEO

UserEvidence

Database of ROI stats

What they are:

A database of all ROI stats gleaned from your survey – sortable by industry, use case, competitive, etc.

Tips for everybody:

Input all of your ROI stats into a Google Sheet, and make sure you can tag or categorize each stat. This will help your sales team quickly be able to sort the sheet to find the customer evidence they need to build that trust and keep that deal moving.

Tips for UserEvidence users:



ways to make finding relevant customer evidence insanely easy for your sales teams:

- First, the UserEvidence Slack bot. Add the bot to your company Slack account, and your team members just need to use the / userevidence command, then type in what they're looking for (i.e. /userevidence time savings).
- #2 Second, make use of Evi, our AI chat assistant. Your reps can use Evi to find the right testimonials by sifting through your asset library for them. For example, a rep could ask, "Can you find me a testimonial related to ROI from the software industry?" And she'll find it. (Saving them time, and you 1000 requests for assets. You're welcome.)



Effective communication

The name of the game here is *repetition, repetition, repetition.*

If you've said it to your sales team once, you need to say it 7 more times. (Seriously – research shows that it takes hearing something 5-7 times for it to truly stick).

Once your surveys are complete, your proof points are compiled, and your assets are ready for your sales team to use, it's time to tell them...

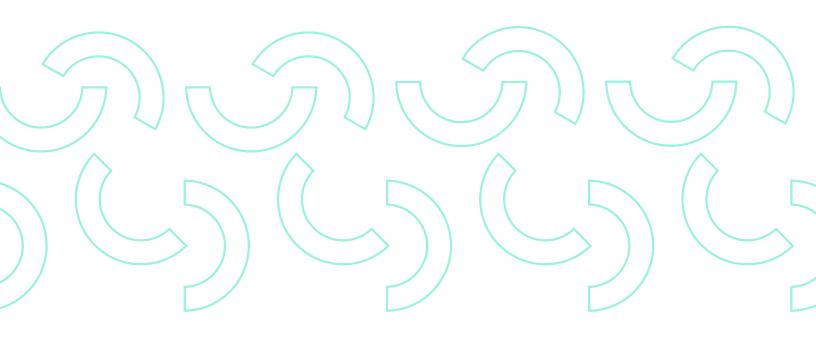
Then tell them again...

Then probably tell them one more time.

Here are a few ways we make sure we're a broken record with our own sales teams:

Start with the "why"

Make sure you tell the story – the **why** – as you're sharing the assets. If the sales team doesn't understand the impact of sharing your proof points with buyers, they won't use them. Simple as that.



If you feel like you need some ammo in telling the story, these stats from our original research on The Evidence Gap should light a fire:

67% of buyers stated they use before making a purchase decision, of buyers stated they want compelling ROI statistics

38% or venciors pro-don't want to be a part of that 37%) yet only 38% of vendors provide this level of evidence (we



of buyers said statistical evidence was the most trustworthy type of customer proof they could receive (these assets give you a quick way to work that statistical evidence into your early conversations)



of buyers want customer evidence that is directly backed by customer data, making authenticity and specifics vital to gaining buyer trust (here's how we gathered this data, so you can share the methodology and earn their trust earlier)

Prep your champions first

Remember all of the sales leaders and reps you interviewed waaaay before you even sent your survey out? They didn't know it at the time, but they are now your champions Present these new assets to them first, and tell them the "why" story. Ask for feedback – *will these assets help? Is this "why" compelling to reps on the ground? Is there anything else our team needs to create to help you all close deals faster?*

With these champions on your side, you'll have a much easier time enabling the rest of their teams.

Meet them where they are

Ask for some time in a regularly scheduled sales team meeting dedicated to sharing, training, and enabling your sales team on the new assets you've created for them. Instead of asking for *more* of their time by adding another training to their calendars, capitalize on the time they've already set aside. Make it quick, effective, and tactical.

Follow up for your life

Keep. Sharing. The. Same. Stuff. Over. And. Over. Again.

Slack it to the #sales channel.

Pop back into the sales team meeting every month to ask how things are going and reshare assets.

Include it in weekly comms from your team.

These are the things that rarely happen because – well, you've got other stuff to do. But, this is the key to making sure your hard-won customer evidence is actually used to create an impact on your bottom line.



At UserEvidence, here's what I do to make sure our assets are always top-of-mind for sales:

Weekly marketing "show and tell": I record a Loom walking the team through new (and old) assets, reminding them of the why, and asking for constant feedback. That gets shared out to the whole GTM team every Friday afternoon as people are wrapping up and winding down before the weekend.

Checking in with my "strike team": I've got 4 reps who I consider my "strike team". They're the ones who I roll assets out to first and foremost, get their feedback, and check in with to see what pain they're feeling. I'll drop them a Slack every couple of weeks to get that info, and I use that to determine what proof points we need to gather next.

Managing up to our C-suite: I record Loom walkthroughs for our cofounders that our VP of Marketing presents to them in a weekly session where I make sure they understand what assets I'm working on, why we're prioritizing those assets, and the results we're seeing from the ground. They always provide great perspective (and a good gut check) from their vantage point, and it's easier for me to get the rest of the sales team bought in when the C-suite is in the loop.

This is the long game

And there's no easy button. In fact, nearly 10 years in the product marketing seat and nearly 20 pages into this guide, I'll be the first to say that making sure your hard work to capture relevant customer evidence gets used by your GTM teams is just straight up hard. And anyone who tells you otherwise probably isn't doing the work to make sure that what they're creating is actually impactful.

But my last – and best – piece of advice to share as we wrap up: **This is the long game.** Whether you're starting from scratch or just implementing a few of these tactics and tips within your existing program, the moves you're making today are ones that you'll start to feel ripples from in the coming months. It won't be tomorrow. It might not even be this quarter. But when you invest in building a relevant and highly-accessible library of customer evidence for your sales teams, the impact will be felt.

At the risk of drinking our own champagne **too** egregious, I do think it's worth sharing some results that UserEvidence customers have seen after investing in scaling their customer evidence libraries to show you how these efforts = max impact:

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"Translating customer data points and insights into compelling metrics and narratives lets prospects see the value of our platform - quickly, easily, and most importantly, in our customer's words. This helps us create deeper trust by backing up our sales and marketing messages with concrete evidence from the actual users."

Elizabeth Raffa

Manager, Customer Marketing, HackerOne



"UserEvidence allowed us to rapidly capture authentic customer proof and then immediately, seamlessly incorporate them into customer-facing collateral. I would estimate the ROI to be "infinity percent" since I doubt we close the last two six and seven figure deals without the proof, and I don't see any alternative way we could have gotten it!"

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"Reduced our sales cycle by about 25% because of social proof, and 3rd party credibility."

Hilmon Sorey Founder, ClozeLoop

Nick Dedekian Industry Corps

This stuff is going to stick. Trust me. When you start with intention, strategically survey, mine for impactful proof points, and stay in your team's ear about all of the ways they can use those proof points – the proof is in the process.