

Ignite Advisory Group offers the most comprehensive, innovative and the industry's only Customer Advisory Board Training. Our training emphasizes real-world, practical experience based on working with the world's leading B2B companies to advance their customer insights, executive voice of the customer, market research and sales and marketing strategy.

Join your peers at the next CAB Training in Miami, FL – Feb. 27-28, 2019

WHO SHOULD ATTEND?

- > CAB PROGRAM MANAGER
- > CAB Executive Sponsor (CXO)
- > Manager/Director/VP/SVP/EVP/GM of:
 - Marketing
 - Product Marketing
 - Customer Experience
 - Customer Insights
 - Customer Engagement
 - Customer Programs
 - Events
 - Executive Briefing Center
 - Relationship Management

WHAT YOU WILL GAIN FROM THE TRAINING

- > **5 top advisory board challenges** and best practices to overcome them.
- > **10 sample objectives and metrics, and example scorecards** and frameworks to build out metrics for your company.
- > **3-stage CAB design and launch process**, including internal alignment, charter creation, detailed program timeline, design decisions and more.
- > **9-step process to recruit** more senior level customers.
- > **7-step comprehensive customer-driven agenda creation process.**
- > **20 ideas and strategies for ongoing engagement** and maximizing the impact and value of the board.
- > **Ample networking opportunities** with other training attendees.
- > **120-page manual** with templates, best practices and charts, yours to keep.



EQUIFAX

“CAB Manager Training with Ignite should be a requirement for anyone looking to start a CAB or currently managing a CAB. The tools, process, and insights are invaluable.”

Monique Eddleton, Enterprise Insights Leader, Equifax

WeWork Miami – February 27-28, 2019

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TODAY**

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CAB Manager Training Agenda

DAY 1 – WEDNESDAY, FEBRUARY 27, 2019

- 9:30 a.m. **WELCOME, OBJECTIVES AND INTRODUCTIONS**
- 10:00 a.m. **CAB OVERVIEW**
CAB definition, benefits, types, maturity levels, engagement spectrum, internal positioning, key challenges, overall best practices
- 11:00 a.m. **BREAK**
- 11:20 a.m. **SETTING THE RIGHT CAB OBJECTIVES AND CREATING RELEVANT ROI METRICS**
Alignment to business strategy, theme, success metrics, CAB impact
Exercise: CAB Objectives & ROI
- 12:30 p.m. **LUNCH***
- 1:30 p.m. **CAB DESIGN, INFRASTRUCTURE**
CAB design overview, sphere of influence, CAB design decisions
Exercise: CAB Decisions
- 2:15 p.m. **CAB CHARTER AND PROJECT PLAN**
Process of creating a charter, developing a 12-month program plan
- 2:30 p.m. **MANAGING THE RECRUITMENT PHASE**
Member selection criteria, recruitment documentation, recruitment process
Exercise: Recruiting Challenges
- 3:30 p.m. **BREAK**
- 3:45 p.m. **AGENDA CREATION AND PREPARING FOR THE CAB MEETING**
Agenda creation process, discussion guide, content development, key milestones, internal preparation prior to meeting
Exercise: Design a breakout session
- 4:30 p.m. **MEETING INVITATION, MEETING KIT & SOCIAL ACTIVITIES**
Creating the content for the meeting, planning social networking opportunities
- 4:45 p.m. **WRAP UP DAY 1**
- 5:00 p.m. **ADJOURN**
- 5:15-6:30 p.m. **NETWORKING HAPPY HOUR**
Venue TBD (Cash Bar. Ignite to provide appetizers.)

DAY 2 – THURSDAY, FEBRUARY 28, 2019

- 9:30 a.m. **MEETING FACILITATION**
Facilitation terminology, facilitation process, role of the facilitator, key facilitation techniques, preparing for facilitated sessions
Exercise: Skills Quiz, Active Listening
- 11:20 a.m. **INSIGHTS REPORT, ACTION TRACKING**
Meeting insights report, tracking key actions
- 11:30 a.m. **BREAK**
- 11:45 a.m. **MANAGING THE CAB FOR OPTIMAL PERFORMANCE - CONTINUOUS ENGAGEMENT, MEMBERSHIP AND GENERATING VALUE**
Engagement plan, subcommittee charter and structure, optimal interaction cadence and frequency, member ranking, member rotation, CAB online communities, leveraging CAB value, marketing deliverables, managing multiple CABs
Exercise: Design a Subcommittee
- 12:45 p.m. **WRAP UP AND FEEDBACK**
- 1:00 p.m. **DEPARTURES**



* Lunch is included for all participants.

What are others saying about the CAB Training?



“While I consider myself an expert in executing and facilitating CAB meetings, there is always something to be learned from Ignite and the other participants. I garnered many great best practices and strategies that will allow my programs to run more smoothly.”

Lisa Bianco, VP Customer Experience, SAP Ariba



“It was amazing to see how much Ignite can have us learn in a short time. We covered not only strategic issues but also very practical tips. I now feel very comfortable taking a more important role in helping us run and scale our CAB efforts.”

Pascal Marmier, Head Engagement Americas and Asia | Senior Vice President, Swiss Re



“Whether you have a seasoned CAB or are just starting out, the CAB training program can add insights and value to your organization.”

Alison Lutjemeier, Sr. Manager, Customer Advisory Board, Adobe Systems, Digital Marketing BU



“The content, networking opportunities, and sharing of best practices were excellent and will help propel our CAB forward.”

Stephanie Kaleva, Senior Product Manager, Oracle



“Ignite is the master chef of CAB management. They provide the cookbook, the best practices, the entire process from soup to nuts, with great attention to detail. I can immediately unlock value from this training”

Paul Comeau, SVP Support and Customer Success, Kyriba



“This was a comprehensive program of best practices and procedures to develop and host CABs. Excellent course materials, coupled with generous opportunities for peer exchange. An excellent group of attendees was a bonus.”

Peter Nogalo, Marketing Manager, ARI

PAST TRAINING ATTENDEES INCLUDE:

ABB, Adobe, Aetna, Akamai Technologies, Amazon Web Services, AMN Healthcare, Appirio, ARI (Automotive Resources International), Atrion Networking, Bell, Benefitfocus, BitSight, Charles Schwab, Cisco, Code42 Software, Commvault, Dell, DriSteem, 84.51 LLC, Ellie Mae, eLoyalty, EMC, Emerson Network Power, Equifax, Fiserv, GE Software, Hewlett Packard, Hexagon Metrology, HID, Hitachi Data Systems, Indeed.com, INDEVCO Group, Intel, Information Builders, InterContinental Hotels Group (IHG), Iron Mountain, Jive Software, Kyriba, LexisNexis Risk Solutions, Limeade, Milliman, MobileIron, Omnitrac, Oracle, OS/soft, Pearson English, PHT Corporation, PNC Bank, Poppulo, Qlik, Rackspace Hosting, Renaissance Learning, Riverbed Technology, Safe Banking Systems, Salesforce, Siemens, Smartsheet, Spectralink, Symantec, Sysmex America, SunGard Availability Services, Surescripts, Swiss Re, Texas Capital Bank, Thermo Fisher Scientific, Thomson Reuters, TransUnion, U.S. Bank, Varonis Systems, Verizon, VMware, Wiley, Xerox

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