

Ignite Advisory Group offers the most comprehensive, innovative and the industry's only Customer Advisory Board Manager and Facilitator 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 Boston, MA

CAB MANAGER TRAINING – JUNE 12-13, 2018

WHO SHOULD ATTEND?

- > CAB PROGRAM MANAGER
- > Manager/Director/VP/SVP/GM of:
 - Marketing
 - Product Marketing
 - Customer Experience
 - Customer Insights
 - Customer Engagement
 - Customer Programs
 - Events

CAB FACILITATOR TRAINING – JUNE 13-14, 2018

WHO SHOULD ATTEND?

- > CAB FACILITATOR
- > CAB Session Owners/ Leaders
- > Managing Director/ EVP/ SVP/ VP/ Director/ Manager of:
 - CAB or Executive Briefing Center
 - Executive Customer Interactions
 - Marketing, Customer Experience, Customer Insights
 - Relationship Management, Client Engagement
- > CAB Executive Sponsor, CxO

What You Will Gain From The Training

CAB MANAGER 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.

CAB FACILITATOR TRAINING

- > **22 facilitation techniques and skills** like tracking, stacking, balancing and more.
- > **7-step process to skillfully guide a discussion.**
- > **Hands-on facilitation skill development** in small and large group exercises.
- > **10 session formats and ideas to consider for your next agenda**, including the welcome session, breakouts, gamification and more.
- > **6 facilitation checklists and guidelines** for your staff, advisory board members and facilitators.
- > **Structures for capturing key meeting insights** and turning them into action for your company.

- > **Ample networking opportunities** with other training attendees.
- > **120-page manual** with templates, best practices and charts, yours to keep.

Metro Meeting Centers | Boston, MA | June 2018

**REGISTER
TODAY**

For Managers: www.igniteag.com/manager-training/

For Facilitators: www.igniteag.com/facilitator-training/

CAB Manager Training Agenda

DAY 1 – JUNE 12, 2018

- 8:00 a.m. **BREAKFAST***
- 9:00 a.m. **WELCOME, OBJECTIVES AND INTRODUCTIONS**
- 9:30 a.m. **CAB OVERVIEW**
CAB definition, benefits, types, maturity levels, engagement spectrum, internal positioning, key challenges, overall best practices
- 10: 45 a.m. **BREAK**
- 11:00 a.m. **SETTING THE RIGHT CAB OBJECTIVES AND CREATING RELEVANT ROI METRICS**
Alignment to business strategy, creating a powerful theme, mutual benefit concept, CAB evolution model, securing executive sponsorship, realizing executive alignment, success metrics and KPIs, CAB impact model
Exercise: CAB Objectives & ROI
- 12:00 p.m. **LUNCH***
- 1:00 p.m. **CAB DESIGN, INFRASTRUCTURE**
CAB design overview, objectives, sphere of influence, CAB design decisions,
Exercise: CAB decisions
- 1:45 p.m. **CAB CHARTER AND PROJECT PLAN**
Process of creating a charter, developing a 12-month program plan
- 2:00 p.m. **MANAGING THE RECRUITMENT PHASE**
Exercise: Recruiting Challenges
Member selection criteria, recruitment process, recruitment documentation and collateral – Group Discussion
- 3:00 p.m. **BREAK**
- 3:15 p.m. **AGENDA CREATION AND PREPARING FOR THE CAB MEETING**
Agenda creation process, creating a relevant discussion guide, content development, key milestones, internal preparation prior to meeting,
Exercise: Design a breakout session
- 4:00 p.m. **MEETING INVITATION, MEETING KIT & SOCIAL ACTIVITIES**
Creating the content for the meeting, planning social networking opportunities
- 4:15 p.m. **WRAP UP DAY 1**
- 4:30 p.m. **ADJOURN**
- 5:00-6:30 p.m. **NETWORKING HAPPY HOUR**
Venue TBD (cash bar)

DAY 2 – JUNE 13, 2018

- 8:00 a.m. **BREAKFAST***
- 9:00 a.m. **MEETING FACILITATION**
Facilitation guidelines, facilitation process, role of the facilitator, interactive exercises
- 9:30 a.m. **INSIGHTS REPORT, ACTION TRACKING**
Meeting insights report, tracking key actions
- 9:45 a.m. **MANAGING THE CAB FOR OPTIMAL PERFORMANCE - CONTINUOUS ENGAGEMENT**
Engagement plan, subcommittee charter and structure, optimal interaction cadence and frequency
Exercise: Design a Subcommittee
- 11:00 a.m. **BREAK**
- 11:15 a.m. **MANAGING THE CAB FOR OPTIMAL PERFORMANCE - MEMBERSHIP AND GENERATING VALUE**
Member ranking, member rotation, CAB online communities, leveraging CAB value, marketing deliverables, managing multiple CABs
- 11:50 a.m. **WRAP UP AND FEEDBACK**
- 12:00 p.m. **LUNCH***
Joint lunch with incoming CAB Facilitator Training participants
- 1:00 p.m. **DEPARTURES**



* Breakfast and Lunch are included for all participants.

CAB Facilitator Training Agenda

DAY 1 – JUNE 13, 2018

- 12:00 p.m. **LUNCH***
Joint lunch with outgoing CAB Manager Training participants
- 1:00 p.m. **WELCOME, OBJECTIVES AND INTRODUCTIONS**
- 1:40 p.m. **FOUNDATION FOR SUCCESSFUL FACILITATION**
DNA of a successful CAB program, agenda creation process, collecting insights, tracking progress, ongoing member engagement
- 2:40 p.m. **THE ROLE OF A FACILITATOR**
Skills, requirements & misconceptions
Exercise: Skills Quiz
- 3:15 p.m. **BREAK**
- 3:30 p.m. **PREPARING FOR FACILITATED SESSIONS**
Coaching & guidelines for participants
Exercise: Preparing Discussion Leaders
- 4:10 p.m. **FACILITATION APPROACH**
The 7-Step Guided Process
Exercise: Challenges
- 4:30 p.m. **WRAP UP DAY 1**
- 4:45 p.m. **ADJOURN**
- 5:00-6:30 p.m. **NETWORKING HAPPY HOUR**
Venue TBD (cash bar)

DAY 2 – JUNE 14, 2018

- 8:00 a.m. **BREAKFAST***
- 9:00 a.m. **FACILITATION TECHNIQUES**
Review of key facilitation techniques
Exercise: Active Listening, Summarizing, Intuition
- 10:45 a.m. **BREAK**
- 11:00 a.m. **FACILITATION TECHNIQUES, CONTINUED**
Exercise: Intervention
- 12:00 p.m. **LUNCH***
- 12:45 p.m. **FACILITATION SIMULATION**
Practice facilitation approach and techniques
Exercise: Developing Strategic Partnerships
- 1:15 p.m. **CREATING FACILITATION PLANS**
How to design a facilitated session
Exercise: Session Design
- 1:30 pm **FACILITATION ROLE PLAY**
Practice facilitating with different personas
Exercise: Role Play Simulation
- 3:00 p.m. **BREAK**
- 3:15 p.m. **BREAKOUT & GAMIFICATION SESSIONS**
Brainstorming and ideation approaches for breakout sessions
Exercise: Gamify a Session
- 4:15 p.m. **WRAP UP AND FEEDBACK**
- 4:30 p.m. **DEPARTURES**

verizon✓

“Every CAB Manager should participate in this training to meet your peers, learn great techniques to take back to your organization, and improve facilitation skills in a safe environment.”

April Twilley, CAB Program Manager, Customer Engagement Programs, Verizon



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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 facilitation techniques that will allow my programs to run more smoothly.”

Lisa Bianco, VP Customer Experience, SAP Ariba



“The quality of this training is world class. A+ Very comprehensive tools and materials, well crafted.”

Bonnie FitzGerald Smith, Senior Marketing Manager, Akamai Technologies



“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



Atrion

“This was the most amazing framework on creating, building and managing Client Advisory Boards.”

Tim Hebert, Chief Executive Officer, Atrion Networking



“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, Charles Schwab, Cisco, 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, LexisNexis Risk Solutions, Limeade, MobileIron, Omnitracs, Oracle, OS/soft, Pearson English, PHT Corporation, PNC Bank, Poppulo, Qlik, Rackspace Hosting, Renaissance Learning, Riverbed Technology, Safe Banking Systems, Siemens, Symantec, Sysmex America, SunGard Availability Services, Thermo Fisher Scientific, Thomson Reuters, TransUnion, U.S. Bank, Verizon, VMware, Xerox

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