

CAB WORKSHOP

Top 5 Innovative Agenda Sessions



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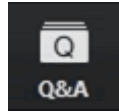
Housekeeping



The workshop is being recorded.



We'll send the recording afterwards.



Questions? Go to and submit your Q.
We'll answer at the end, time permitting

We will go FAST 😊

Today's Agenda

1. Meeting Engagement Challenges
2. Must-haves for CAB Agenda Sessions
3. Top 5 Innovative Agenda Sessions
4. CAB resources



Meeting Engagement Challenges

- Boring – "Zoom fatigue"
- Canned PowerPoint slides
- Too many product demos and product pitches
- Unclear participation ground rules
- Minimal discussion
- Nothing learned



Secret to Success (Members)

ENGAGING

= need to deliver value

Secret to Success (Host)

INSIGHTFUL

= actionable insights



How ENGAGING & INSIGHTFUL?

- ✓ Customer-driven agenda = topics members want to discuss
- ✓ 80/20 rule (clients/host)
- ✓ Experienced CAB facilitator
 - Allows for open dialogue
 - Keeps entire agenda on track
 - Encourages all CAB members to engage
 - Ensures objectivity and fairness in exchanges
 - Manages discussion to achieve session objectives



Use a Variety of Facilitation Techniques

Case Study – customers share how they solved challenges

Panel Discussion – learn from advanced members in group

Voting – quickly capture group opinions

Wall of Ideas – individual insight gathering

Working In Pairs – sharing best practices

Breakouts – work in smaller groups to solve a problem or generate higher quality insights faster

... Ignite has defined 15 CAB
Facilitation Techniques

Top Agenda Session #1: Product Dev Feedback

HOST GOALS

- Prioritize Product Development
- Ensure roadmap is Customer Driven

MEMBER GOALS

- Get insight into roadmap
- Influence roadmap direction



Top Agenda Session #1: Product Development Feedback Session Example

- #1 mistake: Show Roadmap and ask for comments!!!
- It's all about TRADEOFFS (limited R&D budget)

Session Flow

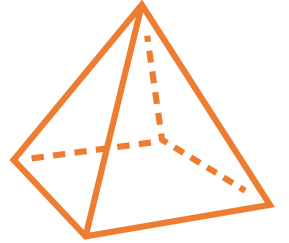
- Typically, 4 – 6 investments
- Dots/Dollars/Chips voting ① ② ③
- Discuss results
- Don't forget to ask, "any other future investments to consider?"



Top Agenda Session #1: Product Development ALTERNATIVE Example

Session Flow

- Host company presents a solution concept
- CAB members vote **Green** = Great value **Red** = Low value **Yellow** = Need more research
- Group discussion on **Red/Yellow/Green** voting trends
- Repeat for next solution idea



Top Agenda Session #2: Design Thinking

- **GOALS** – improve products, services, processes
- Enable outside-the-box thinking
- Challenge previous assumptions
- Problem solving



Top Agenda Session #2: Design Thinking Breakouts Example

Session Flow

- Group discussion on topic (flipchart industry challenges)
- Pre-assign small groups (4 to 6) to tackle problem from different perspectives e.g., Finance/Health/Auto or CIO/CISO
- Complete group exercise TEMPLATE
- Readouts



e.g., Improve Onboarding Process

Current State	Ideal State	How get there?

Top Agenda Session #3:

Strategy Simulation Roleplay

- Real-world business scenario - create story or challenge with a constraint AND sense of urgency
- Why? CAB members like to be intellectually CHALLENGED - its exciting!
- HOST company can observe how clients make strategic decisions under pressure
- Disruptive industry event:
 - Natural disaster (hurricane)
 - Covid
 - Cyber attack
 - Supply chain disruption
 - Shipping costs doubled overnight



Top Agenda Session #3: Strategy Simulation Roleplay Example

Session Flow

- Pre-assign small groups & team lead
- Story explain in stages:
 - 1 min – Hurricane approaching data center – what actions take?
 - 20 mins - Lost power – what do now?
 - 40 mins – Secondary data center cyberattack – how change strategy?
- Readouts



Top Agenda Session #4: Shark Tank Competition

HOST GOAL

- Identify completely New Products to bring to market

MEMBER GOAL

- Identify New Products to bring to market



Top Agenda Session #4: Shark Tank Competition

Session Flow

- Pre-assign “Shark Tank” teams
- Scenario: Bring new insurance product to market
- Complete BUSINESS CASE TEMPLATE – marketing strategy, distribution channels, pricing, ROI estimate
- Readouts – teams “pitch” idea to Shark Tank style panel (host company staff) & select winner



Top Agenda Session #5: Moonshot

HOST GOAL

- Understand how industry could evolve in long term

MEMBER GOAL

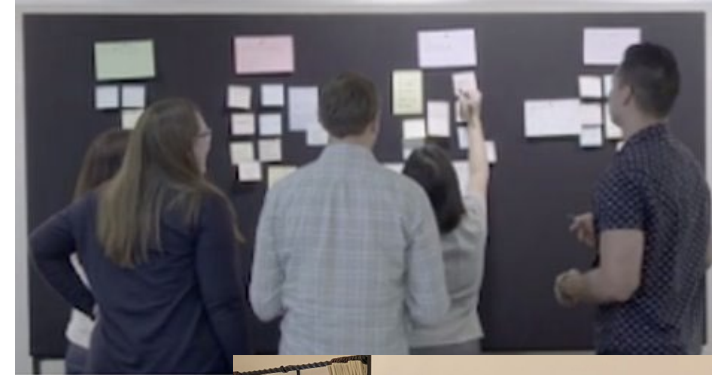
- Enjoy 'Blue Sky' Breakthrough thinking and sharing visionary ideas with peers



Top Agenda Session #5: Moonshot Example

Session Flow

- Q. What new technologies could disrupt industry in future? <wall of ideas & grouping>
- Q. If Elon Musk gave you \$1 billion to disrupt the industry and gain the largest market share, how would you do it?
- <working in pairs & share with group>
- Q. What does this discussion teach us about where the industry is heading in future, what competitive threats exist?



Summary: Top 5 CAB Agenda Sessions

1. Product Development "Tradeoffs"
2. Design Thinking
3. Strategy Simulation
4. Shark Tank
5. Moonshot

Ignite has 20+ awesome session templates!



CAB Resources

Join CAB Training Online

- Highly Interactive
- Small Group
- Limited Seats Available
- 3 Comprehensive Sessions
- Get All Your CAB Questions Answered



Dates: July 2022 (7/12, 7/15, 7/20)



Sign Up: www.igniteag.com/training



CAB Resources

Schedule a Free CAB Evaluation

An Ignite CAB expert will...

- ✓ Share an advisory board program plan
- ✓ Discuss your advisory board needs
- ✓ Make recommendations for your program



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Questions?

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