Delivering a World-Class Customer Advisory Board

IGNITE
ADVISORY GROUP

Key elements to consider when delivering a world-class Customer Advisory Board

A customer advisory board (CAB) can provide your organization with a tremendous amount of value in terms of strategic and product direction, deeper customer relationships, and even sales momentum.

However, these high-profile initiatives can also prove to be very damaging if they are not managed successfully. You don't want to damage relationships with your most important customers in your Customer Advisory Board!

- First, you need to ensure the CAB is built on a solid foundation designed to yield the type of insights your company desires.
- Second, you have to target and recruit the ideal CAB members.
- Only then can you begin thinking about the "Delivery" stage of your board. This is where the tires really hit the road in terms of content, CAB meetings, post-meeting follow-up, subcommittees, etc.
- The best CABs continue to add value and develop over time. As we like to say, a CAB is not a one-time event, it's a year-round program.

5 Key elements to master


Charter Document


Member Recruitment


Annual/ Biannual In-Person Meeting

Agenda Creation


Meeting Facilitation & Follow-Up

Charter Document: Overview and Objectives of your CAB program

The CAB charter is the most important document that will guide your customer advisory council. It lays out (in writing) the board's mission and objectives for clarity, internal alignment and buy-in with your executive team.

The charter also serves as an external-facing overview document for CAB members. The charter describes the benefits they'll receive and what (exactly) they're committing to, the number of planned meetings, their expected tenure, etc.

Along with being useful internally, you will need this official CAB charter document to recruit members.

Suggested Charter formats

1. **Graphically-treated booklet in PDF format** that is emailed to prospective members once they have expressed interest.
2. **Printed booklet (for "white-glove" experience)** that is FedEx'd to members once they officially join the board.

Components of a CAB charter

Customer Advisory Board Overview

- Mission
- Scope
- Objectives
- Duration
- Board member benefits

Customer Advisory Board Membership

- Board Member responsibility
- Membership estimated time commitment
- Membership estimated costs
- Membership nomination

Host Company

- Responsibilities
- Executive Sponsor
- Program Manager
- External Advisory Board Consulting Company

Member Recruitment

Selecting the slate of candidates for your advisory board is an exacting task and critical milestone as you form your Customer Advisory Board. The backbone of any Customer Advisory Board is the board members. You need to ensure that you have the right strategic members that you engage year-round.

Process for CAB member recruitment

Create an ideal member profile and collect nominations. Identifying criteria that delivers a balanced group of peers – in role, function and level –offers the desired depth of dialogue, insight and value your company needs. Some items to consider: Size/significance of account? Familiarity with your products/services? Will the person voice his/her opinions? Based on the criteria, gather nominees from your internal CAB steering committee and sales team.

Invite potential members. After creating branded invitation materials (the official charter document and invitation letter), force ranking target members, and assigning and training recruiters, begin the invitation process.

Onboard members. Begin an onboarding process immediately after acceptance–email a thank you note from the Executive Sponsor (include the charter). Follow up with a 30-minute onboarding call to welcome the person and gather input on top-of-mind topics for the in-person meeting agenda.

Top 5 CAB member recruitment tips

1. **Peer-to-peer membership: Ensure that members are "birds of a feather"** – they see each other as peers at the same level of responsibility and roles (and they have been vetted internally).

2. **Personal invitations by select team members are vital** – accompanying talking points ensure consistent messaging by executives extending the invitation.

3. **Face-to-face meetings have the highest success rate for recruitment**. Think about any customer touch points/meetings within your recruitment deadlines to invite target CAB members. Or extend the invitation via a personal call. Use email as a last resort.

4. **Multiple invitation waves are useful** to land "anchor clients" before progressing to the next tier of your slate. Use the company names of those first CAB members that joined to recruit (an entice) more members to join.

5. **Recruiting never ends** – unfortunately, once your membership is assembled, you must be prepared for subsequent departures by your board members. Some CAB members will depart due to natural attrition – job or role change. For others, your team must step in and offboard the CAB member. Your advisory board must be continually refreshed.

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Annual/ Biannual In-Person CAB Meeting

Your in-person meetings are the big get-togethers that enable your executive team and the members to deepen connections with each other and get to know each other better. And a top benefit for CAB members is networking with their peers.

To facilitate this relationship building, you need to design meetings that allow for such one-on-one and group interaction. Relationship building goes beyond the sessions themselves. You need to consider having breaks that are long enough for members to chat with each other (and have a bathroom break). When planning your meals, encourage executives to mingle and have conversations with the members. Members often times all sit at one table, which is fine. It gives them an opportunity to bond. You can also encourage your executives to pair up with a member during a meal or two to foster a strong rapport.

A successful board comes down to relationships and the members' willingness to openly share and discuss their insights.

Don't forget about team building or networking exercises / social events. For example, yacht cruises work well (in the right weather) and so do tours of local museums or attractions. Check with the hotel staff for ideas.

Don't underestimate the planning and implementation time required leading up to the in-person meeting. Allow for 6-8 months of lead time.

> **"The in-person meeting is the most significant opportunity to meet members in person. It must go off without a hitch. The inaugural meeting sets the tone for the board moving forward.**

Agenda Creation

Your meeting agenda should be interactive and comprised of topics that are of interest to both your executive team and to the members themselves.

Make sure the agenda topics are mutually beneficial. Create engaging and interactive agenda sessions.

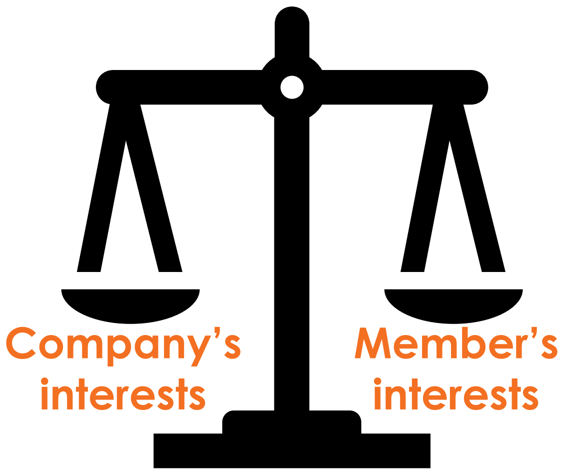
Avoid having a one-sided meeting: your internal team is presenting a bunch of slides, product updates and demos. Don't do it!

The best way to craft such a mutually beneficial agenda is to interview your members and ask them what topics are most important to them.

First, start off with a list of topics your executive team thinks are most relevant and useful.

Run those by members and ask for their feedback and any additional recommendations.

From the interviews with members, you will be able to craft an effective, customer-driven agenda. You can then use the feedback you garnered from members to prime certain individuals to comment on a particular topic during the meeting (one that was important to them).



Agenda topics should be mutually beneficial and of interest to members and the host company equally.

An effective meeting agenda features content that satisfies the interests of *both* the host organization and the members.

Agenda Creation: Session Content

Your company needs to carefully prepare the content it plans to present in each session of your meeting. A good rule of thumb is to present for 20% of the time and leave the rest for open discussion. Meaning, let your CAB members talk for 80% of the time.

Members come to your advisory board meetings to learn from each other and to gain insight into what your company is doing. As such, they want to hear from you about your strategy and product/service roadmaps, but they also want ample time to provide feedback

You may choose to start each session on your agenda with some PowerPoint slides or with a brief verbal presentation of your company's view/standpoint on the specific topic and what your plans are in the specific area. The balance of each session would then be open discussion.

To help you plan out the content for each session, you should utilize a session plan, consisting of the following:

Session Plan:

1. What are the company's objectives for the session?
2. What value does the topic bring to board members?
3. How does the topic build on any member interviews or subcommittee discussions?
4. Are there any pre-reading materials members should be asked to review in advance of the meeting?
5. What will the flow of the session look like?

The content has to be engaging, thought provoking and succinct. The host company cannot present the entire time. It must be a two-way open dialogue.

Effective Meeting Facilitation

The most successful advisory board meetings have ample participation from all members of the board – there will always be some contributing more than others.

Some members will likely be more open and talkative than others and they can dominate airtime. While their contributions are imperative and you do not want to stifle them, you must be sure to also find opportunities for quieter, more reserved members to speak as well. Their insights are just as welcomed and valued.

A good way to ensure participation from all members is to occasionally pose an important question to the group and go around the table asking for feedback from each member. You don't want to do this too often because it does take a lot of time, but when you do it you are sure to gain perspectives from all members.

As a meeting facilitator, you must constantly read the vibe in the room and note the members' non-verbal cues, facial expressions and gestures.

You will be able to tell if a member wants to say something but can't get a word in. You will also note any members that disagree with something said but do not verbally interject. You can then pause the discussion momentarily when this happens and ask the member for his/her point of view.

It is equally important that you monitor how much the host company's executives are talking, beyond the session presenters themselves.

You want the ratio to be somewhere around:

80% of the time **members** speak	20% of the time **executives** speak

Top 6 CAB meeting facilitation guidelines

1. Everyone must participate
2. No side conversations during discussions
3. Only one person speaks at a time
4. Let the facilitator guide the discussion
5. Extraneous topics will be tabled
6. 80/20 Rule of Conversation

Meeting Follow-Up & Capturing Key Insights

Driving compelling results for your advisory board and maintaining its growth over time depends on ongoing engagement and a follow-up/communications plan. Capturing key insights and action items during the face-to-face meeting is critical.

Be prepared to produce and deliver a comprehensive CAB in-person meeting report post-meeting soon after the meeting ends. As part of our facilitation process at Ignite, we use session key takeaway forms to gather feedback from host company employees. A member feedback survey filled out on-site at the end of the meeting provides quantitative and qualitative insights. Promptly distribute the meeting report to key internal stakeholders as well as to CAB members.

Schedule an on-site rehearsal at the in-person annual/biannual meeting and review each account, CAB meeting objectives and each session. **As soon as members depart the meeting, convene your team.** Discuss overall takeaways and actions per session and account.

Develop a yearly engagement plan with various touchpoints – quarterly calls, subcommittee meetings, company updates, webinars, etc. As part of the face-to-face meeting facilitation process, gain agreement on the engagement plan with CAB members. Include the engagement plan inside the CAB meeting report. Create and use subcommittees or working groups to drill down on key topics and produce specific deliverables (like whitepapers, other thought leadership pieces, reports).

> “ **If you’re focused primarily on planning a one-off CAB meeting, you are doing it wrong. It’s a continuous process throughout the year. What happens before and after the meeting makes all the difference.**

Schedule a Free Call

Want help with your customer advisory board program? Talk to an Ignite CAB expert today.

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