

Creating a Customer Advisory Board

Overview and Checklist

by Clearworks

Customer insight programs play an important role for both B2B and B2C companies. The programs advise everything from new product development to strategic direction to overall customer experience. This document focuses specifically on the creation of Customer Advisory Boards (CABs) for B2B companies as one type of customer engagement instrumental in generating customer insights and improving customer experience. Similar types of programs can be used for consumer product companies.

What is a Customer Advisory Board

A Customer Advisory Board (CAB) is a group of existing customers, typically at a senior level, that come together regularly to advise a company on topics such as strategic direction, new products, trends and business focus.

Why Companies Engage in CABs

CABs allow companies to build deeper relationships with customers. CABs are used to gather customer feedback and inputs in a structured way. Additionally, CABs allow companies to demonstrate to customers that they are important and their input is valued.

Tips to Maximizing the Customer Advisory Board

Commit to the CAB – Sometimes companies will start up a CAB, but won't maintain the program through big organizational changes, which can lead to the CAB being disbanded or suspended. This can be frustrating to customers who are excited about participating and it can lead to them feeling undervalued. An ongoing and stable CAB keeps the company in tune with customers, regardless of what may be happening internally.

Bring in Cross-Functional Expertise – While Product Management or Marketing often owns the CAB, involving other cross-functional teams, in agenda formation and even in the meeting itself, can add to the breadth of the discussion and give internal teams more exposure to direct customer feedback.

Keep Objectives in Mind – CABs are typically comprised of senior level customers who can provide input on product roadmap, strategy, etc... If what you really want is feature and function feedback, consider a user group instead and invite the key users of the product or service to participate. Making sure you have the right customer pool to meet your objectives will keep everyone happy.

Tips to Maximizing the Customer Advisory Board (continued)

Keep it Engaging – Often CAB meetings turn into “death by powerpoint,” with the sponsoring company doing all the talking. Remember that the biggest benefit you can gain from your CAB is understanding what customers want, so make sure to focus more on listening to, and learning from, your customers.

Act on Feedback – Nothing is more frustrating to customers than participating in an advisory program and then seeing no action taken as a result. Even though you can’t implement all suggestions, make sure you have a process in place to organize and prioritize the customer’s input, and then provide feedback on what is being changed and what isn’t... and why.

Outlined below are the primary components for developing and implementing a CAB. Use this as a checklist for creating your CAB program.

CAB Overview and Mission

Note: The following steps need to be taken up-front to ensure the CAB’s success, but not all of this needs to be shared with the customers.

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CAB Mission Statement

A mission statement that defines the purpose of the CAB is important to ensure that the priorities and goals are clear.

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Alignment of CAB Objectives to Corporate Objectives

The objectives of the CAB should align and complement your company’s overall corporate objectives.

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Executive Sponsorship and Support

Support from the executive level is important for CABs to be successful. Executives should commit to participating in CAB meetings and other sessions when possible.

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Internal Rules of Engagement

How the CABs will be managed and executed needs to be determined up front. Identify who will be involved, who owns the program, who drives the agenda, who participates, who receives output, etc...

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Relating CABs to other Voice of the Customer (VOC) programs

CABs are often part of a larger VOC program. As a result, determine how it fits in and how to minimize the risk that the same customers are tapped for too many programs or research initiatives.

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Measuring Success

Defining how you will measure success is key to ensuring the long-term viability of your CAB. Develop a plan to gauge success from both your company’s point of view and the participating customer’s point of view.

CAB Program Development

NOTE: The following components should be documented as part of a CAB program overview.

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CAB size and participation levels

The average CAB size is typically between 10-20 members. Global companies may have multiple regional CABs to cover the various countries/regions.

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Member Roles

Identify the roles that you want the CAB members to play; this sets expectations up front with the customers and with the internal team.

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Recruiting Members

Identify the types of members you want on your CAB first then start the recruiting process. For example, you may want a mix of industries represented or you may want a mix of small and large company size. A CAB can be a perk for a good customer, so think of the customers that invest the most in your company. Consider avoiding recruiting customers who compete against each other directly, as that can inhibit open conversation during the meetings.

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Member Succession

Develop a plan for member succession. One idea is to have existing members help recruit their replacements at the end of their term.

CAB Program Documentation

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Membership Invite

Make the invitation something special, not just an email. It could be an invitation, followed up by a personal phone call, or something that makes the customer feel like they are important and have been specially selected to be part of the CAB. Don't forget to include an overview of what the CAB program entails.

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Member Value Proposition

Develop a compelling value proposition. Highlight that the company wants to focus on learning about customers and what customers need so that the company can drive future strategy around products and services.

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Member Rules of Engagement

Develop clear expectations for the CAB engagement and include both what is expected from members and what they can expect from the company.

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CAB Process

Include details on meeting frequency, expectations between meetings, communication processes, etc...

CAB Meetings

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Develop a Meeting Schedule

It is important to develop a planned schedule for meetings so that members know what to expect and when. Meeting in-person is important but can also be supplemented with conference calls and other types of communications.

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Setting Meeting Objectives

It is important to set clear objectives and expected output for each meeting.

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Developing Agenda

Use your broader internal team to develop a comprehensive and interesting agenda. Build in time for interactive breakouts and other hands-on sessions to learn from your customers. Remember to ask for input on what they would like to hear more about at the next CAB.

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Designing an Interactive Session

Mix it up. Use various techniques to keep the CAB meetings fresh and interesting. Consider hiring a facilitator who specializes in making customer sessions engaging.

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Logistics

Consider holding the meetings in locations that will help facilitate creativity or complement the meeting topics.

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Facilitation

Professional facilitation helps ensure that meetings stay on track and meet the set objectives. Alternatively, provide training to your team on how to best facilitate meetings and in particular how to gather customer feedback and needs.

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Capturing Feedback

Have note takers on hand to capture feedback and clarify to the CAB members how feedback will be used. Also highlight how customers will learn what happens to their input and suggestions.

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Social Time

Be sure to incorporate social and networking time into the CAB schedule.

CAB Meeting Documentation

NOTE: As part of developing the CAB program, create templates for the following documents.

- ☐ Sample Meeting Invite
- ☐ Pre-Event Survey Template
- ☐ Sample Agenda
- ☐ Event Feedback Survey
- ☐ Sample Event Read Out and Feedback

Ongoing CAB Communications

NOTE: The following items should be part of the plan that is established for ongoing CAB communications.

- ☐ Establishing Preferred Communication Frequency and Format
- ☐ Following Through on Feedback and Action Items
- ☐ Scheduling Interactions Between Meetings
- ☐ Type of Interactions Between Meetings
- ☐ Sample Action Item Follow-Up Communication

About Clearworks: At Clearworks, our core strength is our customer-focused discipline. Through customer and user research of all kinds, we help our clients listen to and observe customers and use those insights to build products & experiences that are relevant and compelling. We engage with customers using interactive techniques that get customers interacting and talking in new ways to uncover what our clients don't know they don't know. Our team develops and facilitates custom workshops, customer summits, ideation sessions, customer experience design, and journey mapping. Since 2002, Clearworks has been helping large and small companies in a diverse range of industries on projects around the world.

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