



CustomerX Con 2020

Elevate Your Game

**Small, but Mighty: How CABs Can Have an Outsized
Impact on Your Company's Success**

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1pm to 2pm ET

CustomerX Con 2020

Session Leaders



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How has COVID-19 changed your approach to CAB?

Pivoted
to Virtual

- Increased the frequency
- Extended the pool beyond typical exec profile

Focused
on Trust

- Surveyed members to find out what they needed
- Had our CEO engage
- 1:1 sessions with product team

Changed
it Up

- External SMEs joined the call
- “Ask me anything” session with CEO & Engineering
- Early access to industry research

Getting Started - How Do You Create Internal Alignment?

Document

- Create & socialize a CAB Charter
- Ensure SMEs and execs understand their commitment
- Create feedback loop – share insights & actions

Engaged
Execs

- Interview key stakeholders on a semi-regular basis
- Establish an executive steering committee
- Assign an exec sponsor

Focus on
the
business

- Review product roadmap, capture ideas
- Understand how CAB can support sales
- But, be prepared to say “no” sometimes!

How Do You Ensure There's Mutual Value for Company & Members?

Show the Impact

- Show members how feedback had clear outcomes
- Internally – track support for support retention, demand etc.
- Track diversity metrics and trending

Build the Network

- Focus on building relationships "upstream"
- Identify "rising stars" and integrate into the program
- Bring in partners and SMEs on key topics

Focus on Advocacy

- Understand what motivates the members
- Showcase members' industry leadership
- Set expectations - build it into the Charter

How Can You Maintain & Sustain the CAB (beyond the annual meeting)?

Know the Member

- What do they want from the CAB? What motivates them?
- Gather feedback offline – what’s working, what’s not?

Show Value

- Capture how the CAB has impact
- Help members showcase value internally
- Make sure CAB’s aligned with internal goals

Quality,
not
Quantity

- Maintain exclusivity: Create a recruitment profile
- Schedule regular touchpoints - at least quarterly

How Can You Manage the Demands from Sales?

Have Rules

- Establish and document process for nominations
- Create a clear set of requirements
- Set parameters for CAB as a strategic sales tool

Be Strong!

- It's okay to reject a candidate – with good reason
- Conversely, it's important to be able to rotate members
- Use the exec sponsor as ally and tie breaker

Show Results

- Keep sales informed of key updates and results
- Show impact on cross sell/up sell

