

CUSTOMER X CON 2023



Turbocharge Your Customer Advisory Board (CAB)

Driving Value and
Ongoing Engagement

October 18th
9:50 am -10:45 am

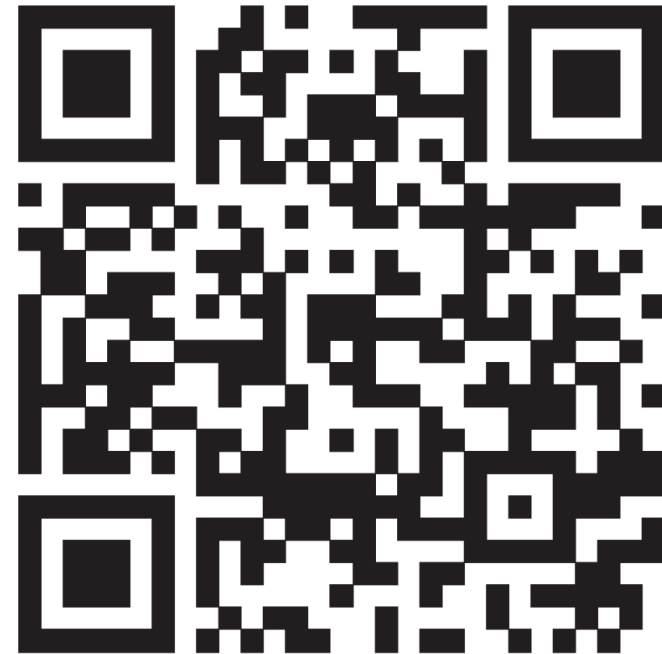


Turbocharge Your CAB

- **Introductions**
- Group sharing: Your CAB objectives
- What do best-in-class CABs look like?
- Group sharing: Your top CAB challenges
- Small group breakout sessions
- Tips for increasing CAB engagement
- Workshop close



Access slides at



Today's Speakers



Melanie Gomez
Sr. Customer Retention
Marketing Manager



Gavin Nathan
Senior Consultant & Partner



About Ignite

- ✓ Only global firm dedicated to CABs
- ✓ 300 advisory board engagements
- ✓ Developed many industry best practices



As featured in

FORTUNE

Forbes

CIO
BUSINESS TECHNOLOGY LEADERSHIP

CIO INSIGHT.



MarketingProfs

IGNITE
ADVISORY GROUP



Getting to Know Each Other



[Group Sharing]

Q. Where are you at in your CAB journey?

- starting one for 1st time
- revamping existing program
- rolling out to new geographies...



What does “ideal” CAB look like?

*A platform for continuous **engagement and insight gathering** for your most important clients.*

- ✓ 18 maximum # of clients
- ✓ 12-24-month membership
- ✓ 2:1 external/internal (meeting attendance)
- ✓ 80% time clients speaking
- ✓ 3-4 meetings annually (in-person & virtual)
- ✓ 1 Executive sponsor (who’s committed)
- ✓ Professional facilitation
- ✓ A very compelling “theme” (your “power to convene”)

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[Group Sharing]

**What are your
CAB program
goals?**



[Flipchart]

Example: Citrix CAB creates unique relationships with their most strategic customers

- **Built a robust pipeline** of customers who **wanted to be advocates** for Citrix
 - Keynote speakers for customer conferences
 - Co-authored blogs with Citrix executives
 - Speaking at internal Citrix employee meetings
- **Established trust** with them
 - Example from Morgan Stanley and General Mass Brigham
- **Turbocharged CAB member profiles** in the industry
 - Nominated them for industry awards
 - Featured in sponsored articles with major tech pubs
- **Enable Citrix Sales team**
 - The Advocacy team created internal champions across Sales that could validate the benefits of having customers on the CAB (the marketing of marketing)



CMO Corner - A conversation with Herb Harrison, Partners Healthcare - Oct 27 2017

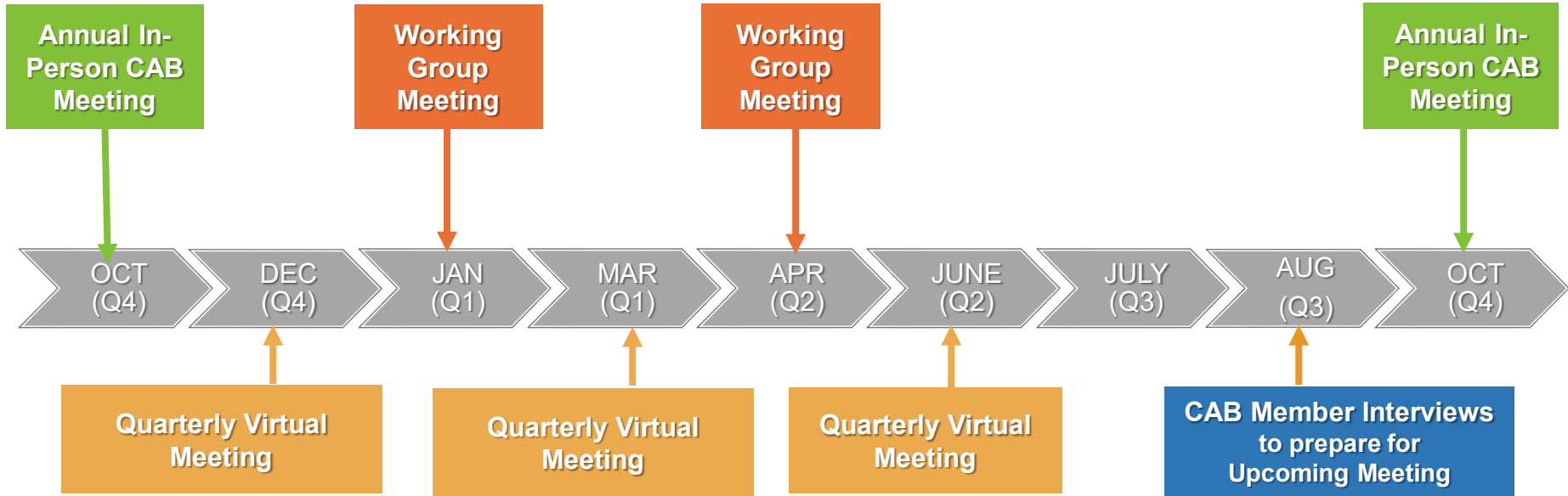


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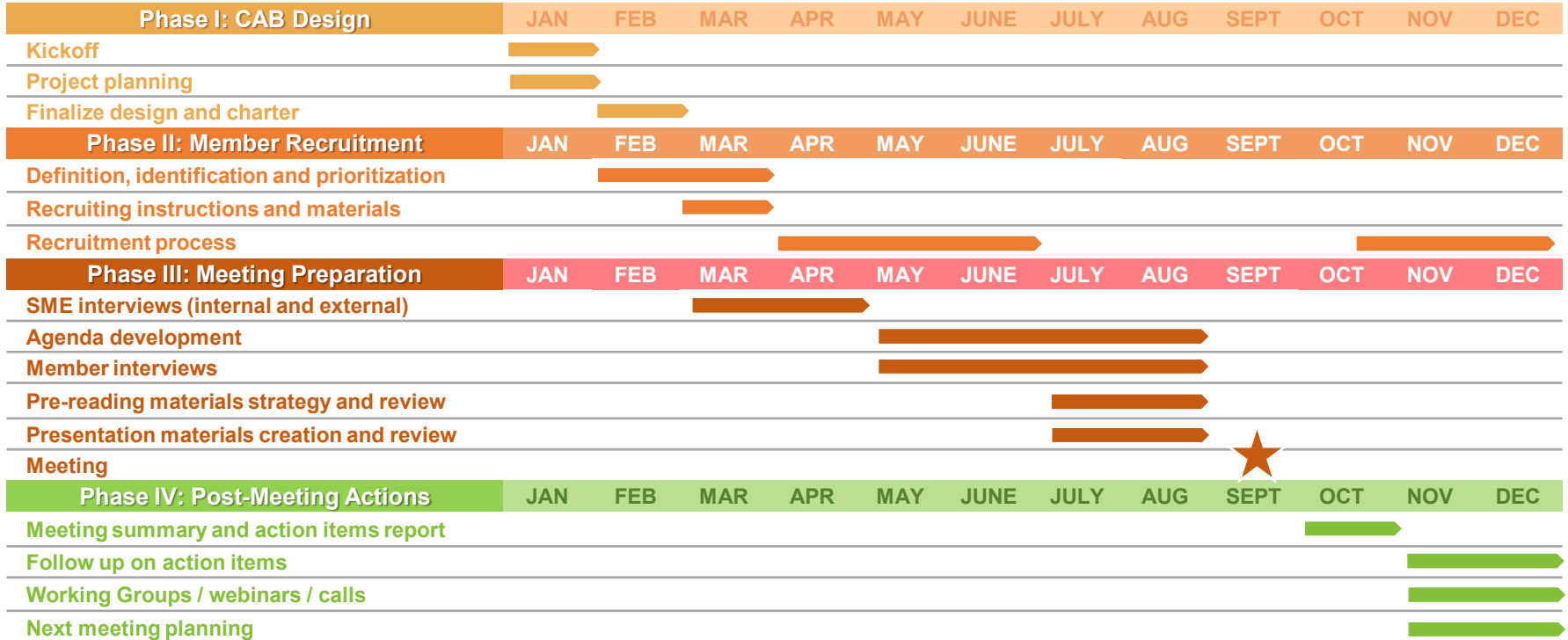
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Continuous Engagement



Plan & Allow enough time to execute



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[Group Sharing]

**What are your top
CAB challenges?**



[Flipchart]

Common CAB Challenges

Getting the program started

Scheduling / getting customers to attend meetings

Gathering executive-level support for your CAB initiative

Running effective CAB meetings

Getting necessary internal resources to run CAB program

Keeping internal stakeholders engaged

Recruiting most strategic / exec-level CAB members

Communicating outcomes – reporting, closing feedback loop

Creating mutually beneficial CAB meeting agendas

Fostering ongoing engagement

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Breakout Group Exercise

Q. What METRICS are effective for CABs?



Breakout Group Readouts



Customer referrals (Track increase)

Member Attendance & Participation

New revenue opportunities

Measure the Board Impact

Member revenue, avg spend (Track increase & Compare to non-CAB customers)

Revenue growth rate & upsell/cross-sell influenced (Compare to non-CAB customers)

Loyalty (renewals / retention) % CAB accounts retained

Members participating in internal & external opportunities

Testimonial, case study, speaking, webinar, press release, thought leadership, overall customer advocacy, beta testing

Product direction validation

Ideas generated

New products & services (or enhancements) implemented

Customer satisfaction (Track increase)

Customer satisfaction (Track increase)



Example CAB Success Measures

Adobe

ROI & KPIs, multiple global CABs

- External satisfaction rate – 83%
- % Retention of CAB members – 100%
- # of Actionable Ideas – 7
- Investment – \$869M
- Internal satisfaction rate – 98%

WKHS

Product enhancement upselling measured

- 64% CAB Accounts (>\$1MM in upsells) vs
- 18% Non-CAB Accounts

Swiss Re

Program deployment

- CAB member acceptance rate
- Number of members
- NPS score post-meeting survey

Impact

- # board suggestions acted on
- Increase in client advocacy score
- # solutions developed / accelerated due to board recommendations



Compare # vs non-CAB accounts



Compare score before joining CAB vs after (e.g., increase in CSAT score)

Leverage CAB for Customer Advocacy

Give members an opportunity to showcase their initiatives, organization, and personal brand.

- *Speaking engagements*
- *Press opportunities*
- *Press releases*
- *Testimonials*
- *Success stories (written or video)*
- *Sales kickoff / town hall*



Engagement outside of CAB amplifies its value

→ Create opportunities for CAB members to network and interact with each other outside of the CAB.



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#1 Co-create agenda with CAB members

Address topics your customers want to cover

Interviews, surveys and/or previous meeting engagements

CAB Agenda Creation Process

Overall Theme
for CAB



Gather Key Topics
from Internal
Stakeholders



Create Interview
Discussion Guide



Individual Member
Interviews



Produce Interview
Summary



Executive Report
with Key Insights
& Top Topics



Draft Agenda
for Approval

#2 Coach employees (Meeting Guidelines)

- Let CAB members respond to each other
- No selling, pitching, defending product
- No screens at meeting
- Attend all CAB meeting sessions
- Review all materials prior to meeting rehearsals (especially CAB member bios)
- Document key takeaways and actions for each session
- Get to know all CAB members at networking / social activities



#3 Use a Skilled Facilitator

Facilitator Role

- Expert in facilitation
- Allow for open dialogue
- Keep entire agenda on track
- Ensure objectivity and fairness in exchanges
- Manage discussion to achieve session objectives

Session Owner

- Share the company's point of view on a single topic
- Summarize session at end
- Take ownership of insights gathered & action items internally
- Subject Matter Experts (SMEs) often provide content for Session Owners

#4 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

Design Thinking



Prioritization Exercise

Prioritization of optimization outcomes

- Operational efficiency: ●●●●●●
- Cost savings: ●●●●●
- Enhanced supplier experience: ●●
- Automation:
- Straight through processing: ●●●
- Technology modernization: ●
- Monetization opportunity: ●●●











Voting (with chips)



Environmental Landscape

| Member Company | aws | Microsoft Azure | Google Cloud | Other |
|----------------|-----|-----------------|--------------|-------|
| 1 | ● | ● | | |
| 2 | ● | ● | | |
| 3 | | ●●● | ● | |
| 4 | | ● | | |
| 5 | | | ● | |
| 6 | | ● | | |
| 7 | ● | ● | ● | ● |
| 8 | ● | ● | ● | |
| 9 | | ● | | |
| 10 | | ● | | ● |

#5 Use a Variety of Session Designs


| | Ignite Session | Question Storming | Ideation | Gamification | Blue Sky Thinking | Design Thinking | Client Engagement Level* | Actionable Insights |
|--|---|-------------------|----------|--------------|-------------------|-----------------|--------------------------|--|
|  | Business Simulation | | ✓ | ✓ | | | 80% | Understand buyer behaviors & Best Practice Sharing |
|  | Innovation Competition (Shark Tank) | | | ✓ | ✓ | | 90% | New Business Ideas |
|  | Product Roadmap Decisions (Forks in Road) | | ✓ | ✓ | | | 80% | Product Development Prioritization |
|  | Speedboat (Design Thinking) | | ✓ | | | ✓ | 85% | Product Enhancements |
|  | Customer Journey Mapping (Personas) | | | | | ✓ | 85% | Unearthing Customer Needs |
|  | Moonshot | | ✓ | ✓ | ✓ | ✓ | 90% | New Product Ideas |
|  | Reimagining the Future | | ✓ | ✓ | ✓ | ✓ | 80% | Overcome a challenge |
|  | Environmental Scan | ✓ | | | | | 95% | Top of mind issues & opportunities |
|  | Strategic Partnerships | | ✓ | | | | 90% | Deeper Client Relationships |
|  | Success Steps | ✓ | | | | | 95% | Mutual agreement on CAB outcomes |

(* Percentage time clients are speaking/interacting vs. presentation)


Thank You!

Connect with us on LinkedIn

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