

Eight Building Blocks for CAB Success



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Additional CAB resources

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<http://blog.geehangroup.com/blog/geehan-group>

8 Building Blocks for Success

- 1 Executive Involvement**
- 2 Connection to Strategy**
- 3 Membership Design**
- 4 Member Recruiting/Commitment**
- 5 Content Design**
- 6 Meeting Experience**
- 7 Follow Up Actions**
- 8 Results**



Membership Design, Recruiting & Retirement

- Which customers should you invite?
- How do you position with your customers?
- How many members should you have?
- How often should you rotate membership?
- How should you reward customer participation?

Who to Invite

- Determine what companies (not individuals) are most strategic to your success

Biggest revenue, most potential for growth, innovator, culture of collaboration, configuration

- Define the optimal mix, skills and experience for Board members

Grouping by discipline is the most common – be careful about mixing levels (discussions will go to the lowest common denominator)

- Cross disciplines (level appropriate) also provide an added dimension and perspective, e.g. CIO, CMO, CFO

Aim high to maximize value

Decision Maker

CIO/CTO

**Drive Change
Set Direction**

Influencer

Director/Vice President

**Run the Business
Business Process**

User

Managers

**Execute
Features/Functions
Workflow/Productivity**

Positioning Membership with Customers

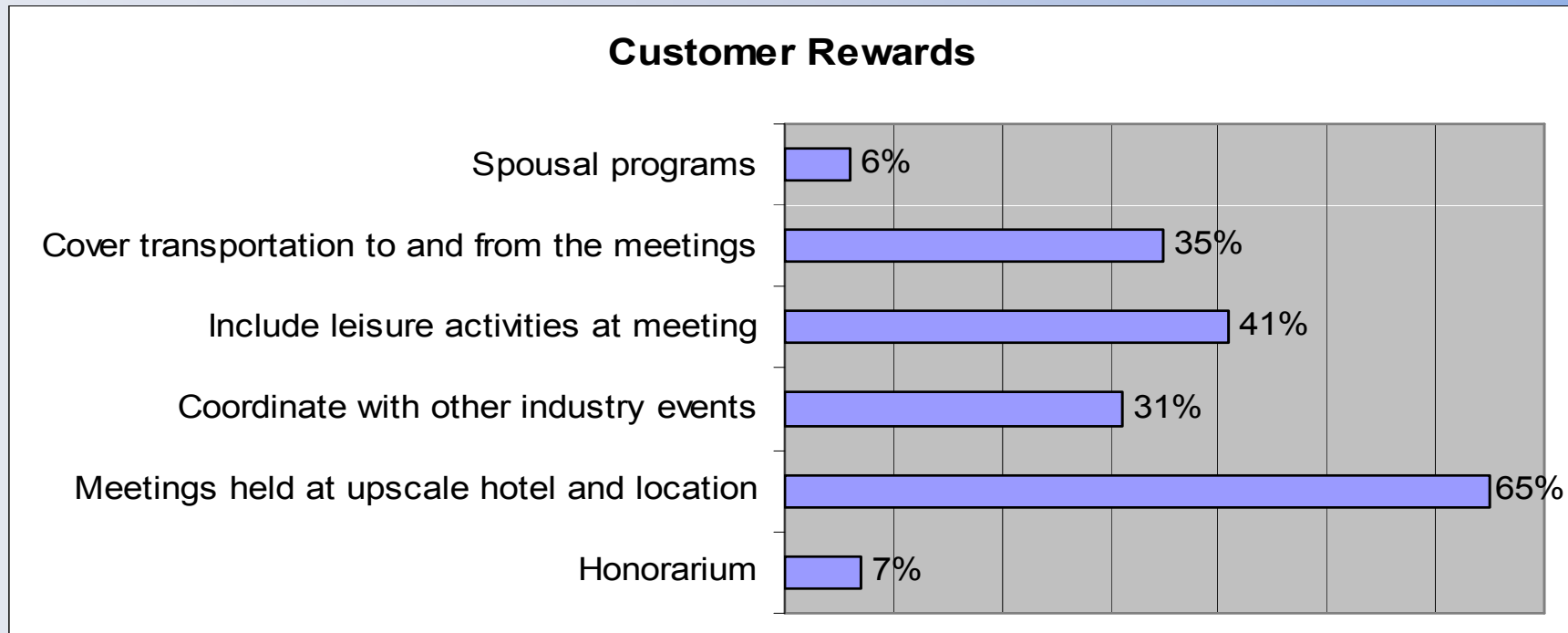
- A seat at the table to influence the strategy/ direction of a key supplier
- Share candid feedback on services, offerings, solutions and business models with senior executives
- An opportunity to collaborate on co-developing/ innovating solutions
- Network and socialize with peers and industry experts
- Share best practices and learning

How Many Members?

- For productive and objective discussions: 12-18 at face-to-face meetings
- Not all members will be available to attend every meeting
- Consider the geographical make-up of your board
 - Local (driving distance); Regional (Americas, EMEA, APAC) or Global

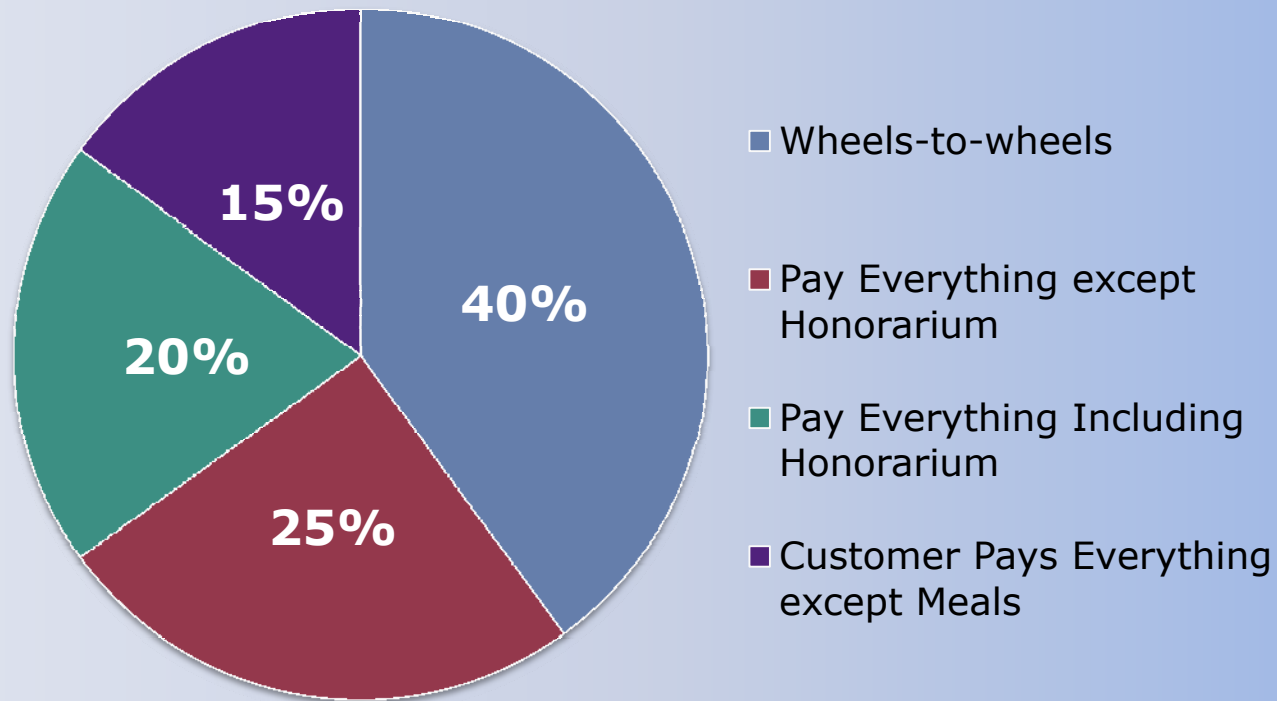
	Recruit	Accept	Attend Meeting
Global Board	32-38	22-24	12-18
Regional Board	25-30	18-20	12-18
Local Board	25-30	18-25	14-18

Ways to Reward Customer Participation



- From a Survey conducted by Geehan and Clearworks, 60 respondents (90% in charge of a CAB), gave feedback regarding the ways CAB members are rewarded

Advisory Board Travel Breakdown



Recruiting Members to Your CAB

- Executive Sponsor Leadership
- Identify right internal recruiters to contact candidates
- Validate list of candidates with recruiters, matching those with the best relationship
- Develop Talking Points for recruiters to follow to ensure a consistent approach
- Provide supporting materials
 - Charter, One pager, FAQs

Recruiting

Key Activities Checklist

- Based on the Priority Issues to be addressed by the Board, define the optimal mix of members and perspectives needed
- Identify the customer companies to be included on the Advisory Board
- Identify recruiting agents for each candidate/company
- Develop a Recruiting Communications Plan and approach (who will be involved; the message; documents to develop)
- Publish and distribute documentation to recruiting agents and key stakeholders; follow-up with training call



"Overall sales increased 21% during the recession when our competitors were flat or sales went down."

- Vineet Nayar, CEO, HCL



HCL's Customer Advisory Council

- Reference accounts increased 200%
- Customer satisfaction increased 25%
- Thought Leadership commitments – 30% participation

Key ROI of CABs

	Decision Maker Levels	
	No CABs	Have CABs
Retention	72%	90%
Account Growth	4%	12%
Reference-able	28%	94%

What Keeps Them Coming Back?

- Feeling of time well spent/productive discussion
- Host company did a good job of listening to customer feedback and probing for clarification
- Meeting included opportunities for networking
- Opportunity to drive change/influence direction
- Improvement in services/offerings/solutions/business models
- Ongoing communication of next steps/actions
- Opportunities to engage between meetings

Five Tips to World-Class

1. **The Power is in the Perspective**: Recruit the right people to provide the input you *actually need*—often it's not who you already know.
2. **Content is King**: Discussions must be relevant to all participants or they won't be as valuable (or worth coming back for)
3. **80/20**: You are there to listen and learn. Your customers/prospects should be talking 80% of the time.
4. **Follow-up, track and report**: Keep a score card on program and be completely transparent about progress.
5. **Event to Initiative**: Continuous engagement throughout the year.



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