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Many companies, both large and small, are considering or are already running customer or partner advisory boards. These sessions can be very effective tools to gain feedback on strategic priorities and company direction while solidifying relationships with top customers. Here are a few answers to some of the most commonly asked questions about these forums.

1) I'm introducing a new product. How can I get the CAB members to give me relevant feedback on something they haven't seen yet?

The best way to get relevant feedback on a new product or service is to engage in a customer dialog on customer pain points, priorities, and business problems, not on features and benefits. To get the feedback you are looking for, the best approach is to structure an agenda in the following way:

- 1) State a business hypothesis related to a customer pain point that your new product addresses (*but don't unveil your new product yet*).
- 2) Ask direct questions that engage the customers to share their business priorities and criteria for solving these problems or issues.
- 3) With this as background, then share your new solution and ask customers to respond to the concept as it addresses the hypothesized pain point.

Carefully crafting an agenda and directing the conversation in this way usually leads to some insights and perspective that would not have been discussed in a more typical focus-group discussion.

2) What are the benefits of CAB facilitator? I expect my marketing team to be able to conduct these sessions themselves.

Product managers can be excellent facilitators of user group sessions, but when you want to get insight into your customers' business strategies and priorities and how your company can help, investing in a professional facilitator is very appropriate. Here's why:

- 1) A professional facilitator is experienced in moderating executive-level meetings, inviting participation from all customers, recognizing body language, and ensuring the agenda stays on topic. This expertise is not always common in even the best product managers.

- 2) Customers often complain that CAB sessions hosted by a company executive are highly biased as they overtly drive customers to a seemingly apparent conclusion. Using a facilitator can help create an unbiased atmosphere and a safe environment for customers to voice their views and experiences.
- 3) Marketing owns the CAB event and will play an important role in identifying the proper customers to invite, help set the proper agenda, prepare presentations, and coordinate the meeting logistics. A facilitator will work closely with this team to ensure the meeting delivers the intended results.

3) Although we like the CAB format, we're concerned that the meeting will deteriorate into a series of customer complaints. How can we keep the conversation focused on forward thinking topics?

This common fear is easily addressed by setting ground rules and expectations for customer interaction when you invite your customer attendees. Planning your CAB starts with the identification of customers you wish to invite. You will want to invite executive-level participations from your most strategic customers. The invitations should clearly state the following:

- 1) The objective of the CAB and how often it meets (usually twice a year).
- 2) A sample agenda describing the type of topics you hope to cover and the extent of feedback you'd like to collect.
- 3) Expectations for any prep work you'd like customers to complete prior to the meeting.

Most CAB presentations also begin with a summary of the above items, as well as an invitation for the customers to engage with any company executives to discuss any personal business topics off line. Should inappropriate topics arise, a professional facilitator will be able to diplomatically refocus the discussion and keep the agenda on track.