
Customer Advisory Board Checklist



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What is a Customer Advisory Board?

A CAB is a strategy-level focus group – a sounding board for your CEO and executive team to test ideas and preview business plans with leaders from your most important and interesting customers. This representative group of customers (ideally 8 – 12) meets once or twice per year, in person, to discuss trends and drivers affecting their business and offer advice on your company's direction. These facilitated meetings are a great way to validate that your company vision and product direction are in sync with your customers' evolving needs and expectations.

Choosing a CAB partner

A CAB expert can help you get the most from your CAB program and every meeting. However, not all CAB facilitators are alike. Ultimately, your decision on who to partner with should be based on your specific interests and business requirements. There are 3 types of facilitators:

- Timekeepers (i.e. the simplest form of facilitation)
- Subject matter experts (i.e. analysts)
- CAB specialists (i.e. full-service partners)

If you decide to outsource this function or run it yourself, keep in mind to design and integrate your CAB so that it connects with your annual planning process and your broader voice-of-the-customer/market engagement model. To help you evaluate your options, I've created this CAB Checklist consisting of some key questions worth asking any perspective facilitator.



Mike Gospe is a professional CAB strategist, facilitator, & coach

Whether you are planning your 1st CAB or re-energizing your current program, contact me to learn more about creative ideas and best practices to ensure you deliver a world-class CAB experience.

Contact Mike Gospe
for a complimentary 30-minute
CAB consultation:

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Questions to ask when building your business case

- ☐ What is the specific objective of my CAB program?
- ☐ Why are we interested in a CAB *now*?
- ☐ What is missing from our current customer experience (CX) or voice-of-the-customer (VOC) efforts?
- ☐ What do we want to learn from our CAB?
- ☐ How will we share and apply the information we collect?
- ☐ Is our company prepared to prioritize and support a CAB as a cross-functional program?
- ☐ What is our budget to support a CAB?
- ☐ Do we have an internal CAB executive sponsor?

Questions to ask a potential CAB vendor/facilitator

What is their history?

- ☐ Tenure: How long have they been facilitating CABs?
- ☐ Focus: Do they specialize in CABs for B2B companies or B2C Companies or both?
- ☐ Focus: What portion of their business is dedicated to CABs?
- ☐ Target market: Do they primarily service Fortune 500 companies or small/medium businesses?
- ☐ Experience: Do they have experience in our industry?
- ☐ Experience: Are they familiar with our products or product categories?
- ☐ Experience: Who else have they worked with in our industry?
- ☐ Leadership: What customer engagement “thought leadership” do they possess?

What’s their methodology?

- ☐ How flexible is their methodology? Will they allow us to tailor the methodology to better serve our needs?
- ☐ What is the length of a typical CAB project engagement?
- ☐ What is their approach to facilitation? What type of facilitators do they provide?

What services do they offer?

- ☐ Do they provide an all-in-one package of CAB strategy, planning & facilitation services?
- ☐ Do they provide CAB services a la carte?
- ☐ Do they provide facilitation-only (day of meeting) services?
- ☐ What other services do they offer to help align and integrate our CAB with our business plan?
- ☐ Do they provide facilitator coaching or consulting services if we want to run our own meeting?
- ☐ Are customer interviews included as a standard service, or as an additional expense?
- ☐ What is their stance on video/audio taping of the CAB meeting?

How will they manage the project?

- ☐ Who exactly will be facilitating our meeting?
- ☐ Can we pick the facilitator we want?
- ☐ Do they manage the logistics, or do we manage the logistics?
- ☐ How do they define the facilitator’s role versus the role of CAB sponsor and CAB host?

How do we feel about the relationship?

- ☐ Do we like and trust the facilitator? Are we comfortable with the facilitator?
- ☐ Do we believe the facilitator and methodology will fit comfortably within our company culture?