



Mike Gospe's
**Customer Advisory Board Masterclass
Workbook excerpt**

Voice-of-the-Customer exercise

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The Flipchart Guide to Customer Advisory Boards, Volume 1: *Is your company ready?*

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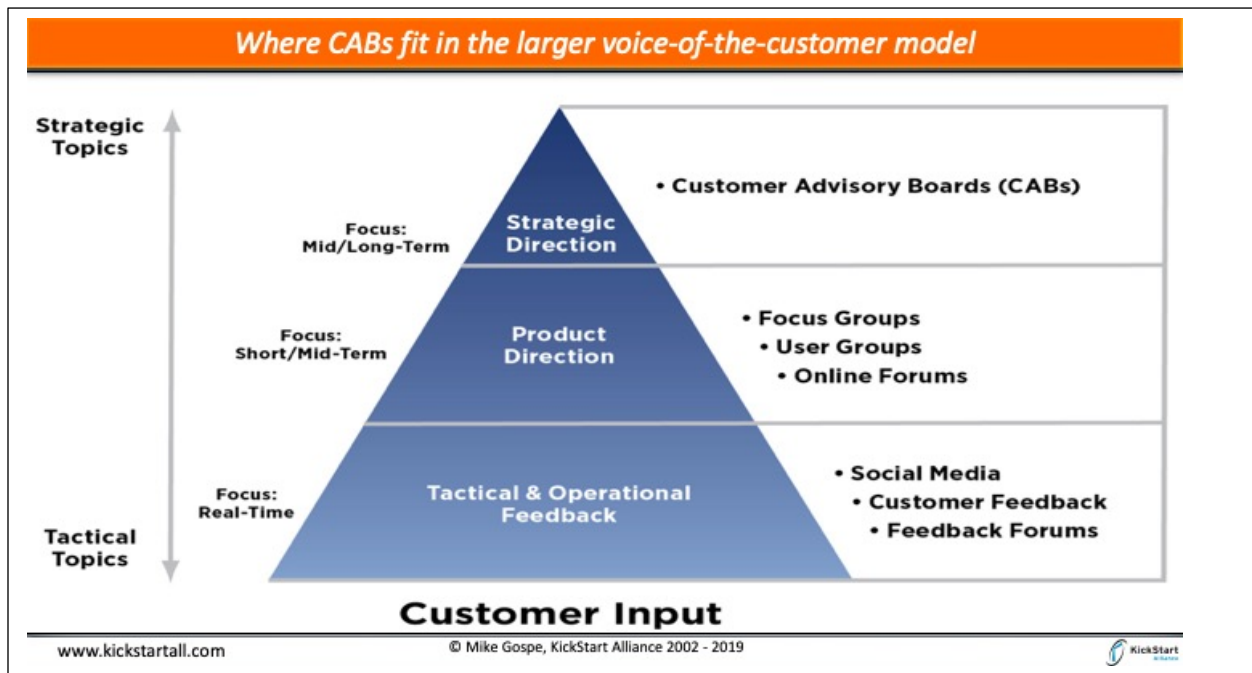
The Flipchart Guide to Customer Advisory Boards, Volume 2: *How to execute a world-class CAB meeting*

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Building your own Voice-of-the-Customer Model

Before we dive into CAB best practices, let's take a step back. There are many tools available for engaging your customers and collecting qualitative and quantitative market research. Is the CAB the right tool for answering the questions that are keeping you up at night? This simple voice-of-the-customer model will help you confirm or challenge your suspicions.



Let's reflect on where CABs fit in the universe of customer touchpoints.

The Y-axis suggests a range of topics you want to discuss with your customers. Tactical Topics are things like, "I had a bad experience on Tuesday. Can you help me fix it?" They are tangible topics, offered in real-time. That's where tools like social media and customer satisfaction surveys fit.

On the other end of the spectrum are Strategic Topics, like, "How is the customer's business evolving over the next 3 years? What problems do they need help solving so they can accelerate their growth?" Strategic Topics have a time horizon of 18 – 36 months out. Here, we can explore the future together.

And in the middle, we have Product Direction Topics. This is where tools like traditional product focus groups, user groups, and online forums fit. "Should the product be red, blue, yellow, or green? What should the user interface look like?"

All of these questions are important. The key is to know which tool is the best one, at the right time, and in the most effective format for soliciting answers to your questions.

In the ideal world, your company will be using tools at all three levels throughout the year. But these tools should not live in a vacuum. You need an *integrated* voice-of-the customer model for gathering, sorting, analyzing, and sharing customer input for the benefit of the entire company – not just the department sponsoring a specific tool.

EXERCISE: Illustrate your company's V-O-C Model

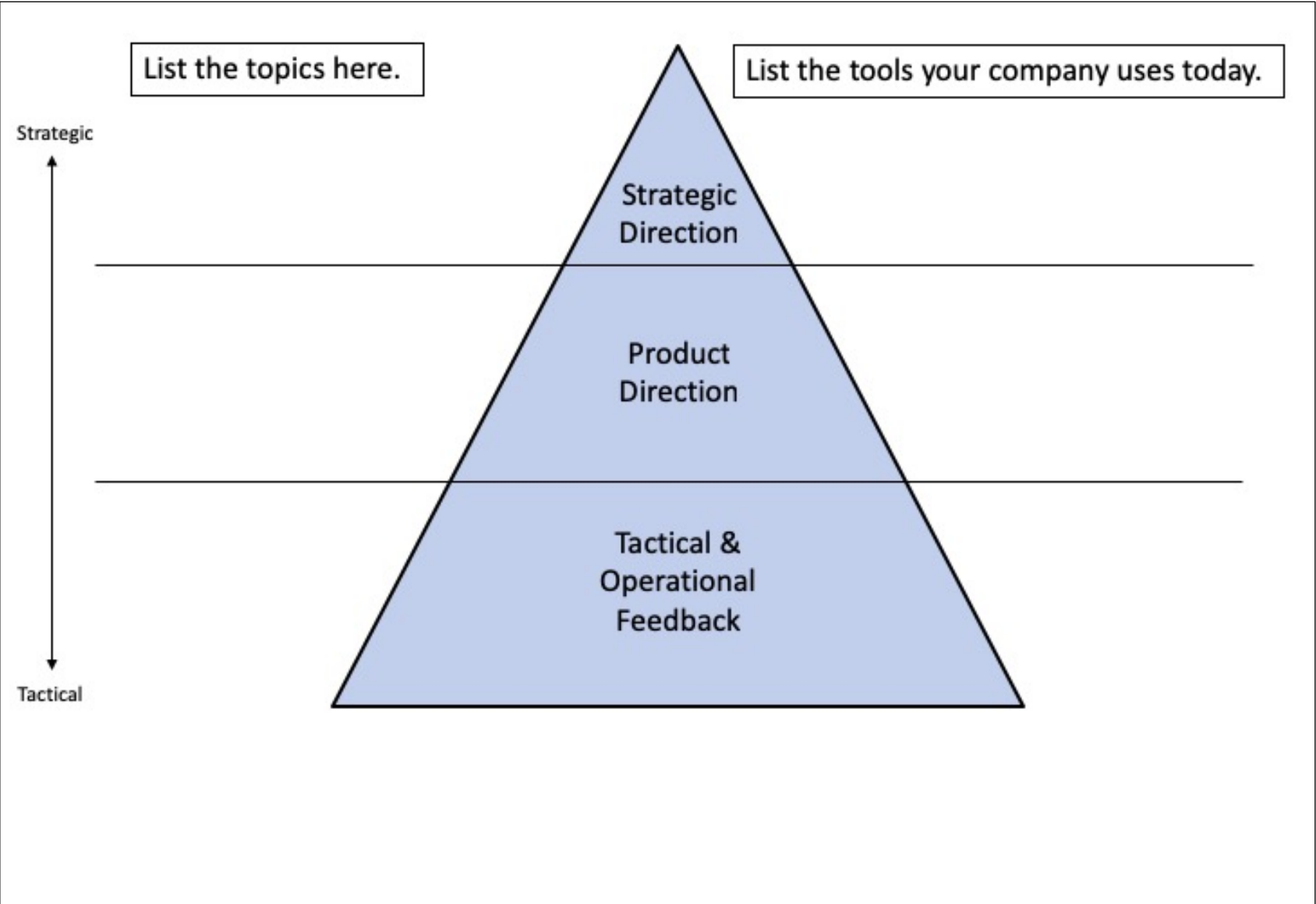
A good way to clarify the need for a CAB and the benefits it can bring your company is to build a voice-of-the-customer model. This exercise is best conducted with a small cross-functional team. Don't do this by yourself.



Step 1: On the right side of the template, list the tools your company uses today to engage your customers. If you aren't sure, ask your colleagues in marketing, product management, customer support, etc. what tools they are using.

Step 2: On the left side of the template, indicate what topics (or type of questions) are being asked via the list of tools you specified in step 1.

Step 3: Where are the gaps? If you have a lot of tools and tactics being used at the bottom of the pyramid and nothing at the top, then your company may be ready to embrace a CAB program.



Mike Gospe is a professional CAB facilitator for B2B companies with more than 30 years of B2B tech leadership experience. Since 2002, his market leadership and CAB best practices have helped large and small enterprises deliver more than 100 successful CAB engagements.

To learn more about his tools, “how to” books, and custom engagements, visit his [CAB Resource Center](http://www.cabstrategy.com). (www.cabstrategy.com)



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