

# Customer Advisory Board Masterclass Syllabus

with Mike Gospe

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## Overview

### Are you ready to harness the full potential of your CAB?

A successful CAB program results in more satisfied customers and employees, higher solution adoption, and increased customer lifetime value.

This Customer Advisory Board Masterclass offers you a front row seat and tailored guidance from Mike Gospe, CAB strategist. In a series of intimate and interactive sessions, we will focus on strategies for collecting wisdom and meaningful guidance from your best customers. This is critically important for maintaining your leadership position today and ensuring you stay relevant.

- Come with your CAB program intention. Leave with an optimized framework.
- Learn the latest best practices for engaging CAB members throughout the year.
- Discover how to use your CAB to outpace your competitors.
- Engage with a cohort of peers in an interactive environment.
- Obtain exclusive examples, resources, and templates to quickly drive your CAB's impact.

This three-week Masterclass includes three two-hour sessions, with options to include 1:1 coaching with Mike Gospe.

Go to [www.cabstrategy.com/cab-masterclass/](http://www.cabstrategy.com/cab-masterclass/) to get all the details and to register.

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## Audience

This Masterclass is for anyone who is building their CAB program for the first time and for those who are eager to take their program to the next level by learning how to make the most of this strategic investment in customer research. Attendees include leaders from Marketing, Product Management, Customer Success, Customer Service, & Voice-of-the-Customer departments.

Come with your teammates to transform your cross-functional CAB program together.

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## Learning Objectives

- **Design & execute a CAB Playbook** that fits today's world
- **Integrate your CAB program** with your annual business planning process
- **Engage in meaningful conversations** with CAB members (not presentations)
- **Deliver a winning CAB experience** that differentiates your CAB from your competitors' CABs
- **Harness the full potential of your CAB** throughout the year (not just a single meeting)

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## Participation & Assignments

Active participation and assignments throughout the three-week course ensure participants get the most from the Masterclass. Please block out 60-90 minutes each week to complete the assignments.

Masterclass text: To ensure the limited class time is dedicated to tailored guidance and discussion rather than basic concepts, please peruse [The Flipchart Guide™ to Customer Advisory Boards, Volume 1](#), and [The Flipchart Guide™ to Customer Advisory Boards, Volume 2](#). Three workbooks will also be provided.

Pre-work: Read **The Flipchart Guide™ to Customer Advisory Boards, Volume 1: Is Your Company Ready?**

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## Session One

Session One is all about CAB strategy:

Topics:

- What is a “true” Customer Advisory Board *program*?
- Where CABs fit in the voice-of-the-customer model
- How to incorporate CAB insights into your annual business planning process
- Understanding human psychology in CAB design
- The right tool for the right job
- Five steps to CAB program design
- Introduction to the latest CAB Playbook
- Why successful CAB programs are a self-fulfilling prophecy

Post-Session One Assignments:

- Review Workbook #1
- Peruse: The Flipchart Guide™ to Customer Advisory Boards, V2, pages 1-58.
- Draft your CAB Charter Statement (see handout example, provided in class)

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## Session Two

Session Two is about CAB program design:

Topics:

- Defining your CAB objective(s) & documenting your CAB Charter Statement
- Continuing CAB conversations throughout the year so they expand like chapters in a book
- How, where & why virtual meetings work (and where they don't)
- Strategies for inviting (and retiring) CAB members
- Agenda design best practices: common traps and how to avoid them
- Designing “discussion modules” that give you clear guidance (and don't waste everyone's time)

Post-Session Two Assignments:

- Review Workbook #2
- Design your integrated CAB program
- Peruse: The Flipchart Guide™ to Customer Advisory Boards, V2, pages 59-96.

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## Session Three

Session Three is about CAB operations & etiquette:

Topics:

- Facilitation best practices (when outsourcing or doing it yourself)
- Rules of engagement
- Documenting, socializing the outcome & applying what you've learned
- Creating a closed-loop system
- How to use your CAB to find new revenue streams
- Final recommendations for your program

Post-Session Three Assignments:

- Talk to a handful of (potential or actual) CAB members
  - Build a system for capturing and sharing CAB reports internally
  - Put your new CAB framework into practice
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