

# Private Customer Advisory Board Masterclass Program & Syllabus

with Mike Gospe, CAB Strategist & Professional Facilitator

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## Overview

### Train your team to design and deliver a world-class CAB experience

A successful CAB program is a catalyst for growth, innovation, and long-term success – for both your company *and* your customers.

Our [Private Customer Advisory Board Masterclass](#) offers you and your team 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 your company stays relevant*. Your CAB program, if executed correctly, will become an increasingly important lifeline with your best customers, especially during times of economic uncertainty.

- Private Masterclass comes with 5 seats for your team.
- 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.
- Obtain tailored advice and resources to quickly harness your CAB's potential.
- All attendees will receive a copy of my two-volume CAB operations manual: [The Flipchart Guide to Customer Advisory Boards](#) (available on Amazon), plus 3 workbooks.

This two-week Private CAB Masterclass includes two scheduled two-hour sessions, plus two ad hoc hours of “office hours” consultation. We’ll use that time to design or refine your CAB program.

**March 2024 Tuition Special: \$5,000** (a \$10,000 value, discounted 50%)  
(includes an evergreen license to use Mike Gospe’s CAB materials, teachings, and best practices)

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## Audience

This Private Masterclass is tailored for your specific company. It is a perfect introduction 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 often include leaders from Marketing, Product Management, Customer Success, Customer Service, & Voice-of-the-Customer departments.

Come with your teammates to build or 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.
  - **Learn how to use your CAB** to 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 two-week course ensure participants get the most from the Private Masterclass. Please block out 60 minutes each week to complete the assignments.

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## Session One – Part 1

Session One, Part 1 focuses on 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 step methodology to CAB program design
- Introduction to the latest CAB Playbook
- Why successful CAB programs are a self-fulfilling prophecy

Post-Session One, Part 1 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 One – Part 2

Session One, Part 2 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 in-person & virtual meetings work (and where they don’t)
- Strategies for inviting, nurturing, and even retiring the right 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 One, Part 2 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 Two – Part 1

Session Two, Part 1 explores 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 Two, Part 1 Assignments:

- Interview a few 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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## Session Two – Part 2

Session Two, Part 2 is custom tailored to address your specific questions:

Examples of topics used in other Private Masterclasses:

- Best practices for driving internal alignment
- Advanced engagement techniques for virtual, in-person, and/or CAB pod interactions
- How to interview CAB members effectively

## Additional “office hours”

Also included are two hours of “office hours” that your team can use within 30 days of completing the Private CAB Masterclass.

## About your instructor

### Why work with Mike Gospe & KickStart Alliance?

- ✓ **We deliver *world-class* customer meetings (CABs, executive roundtables).**
  - Mike Gospe co-founded KickStart Alliance in 2002 with a vision of inspiring B2B tech companies to become more customer-focused.
  - He and his team have helped B2B tech companies plan and execute more than 250 CAB and executive roundtable (ERT) meetings.
- ✓ ***We’ve been in your shoes.***
  - We come from the business world. Mike and his team all held corporate roles as CMO and head of marketing roles prior to joining the KickStart Alliance.
  - We understand your expectations because we’ve been accountable for driving customer relationships.
- ✓ **We are your partner, not just the facilitator.**
  - We guide you through every step of the process.
  - We will help you achieve the business outcome you want.
- ✓ **We’re flexible and agile.**
  - Your company is unique, so we will tailor our methodology and Masterclass around your needs.
- ✓ **Mike Gospe is acknowledged as the SME (subject matter expert) on CABs.**
  - Mike pioneered the CAB movement by writing the first ***CAB operations manuals*** in 2013. His CAB books have been sold worldwide and continue to help company leaders strengthen their customer relationships.
  - Mike’s ***CAB Resource Center (cabstrategy.com)*** is dedicated to sharing CAB best practices. Launched in 2017, the website has become a trusted resource for CAB managers from around the world.

