

## What came first, the CAB or the executive relationship?

By Mike Gospe

In recent months I've been surprised to hear of companies choosing to forego a [Customer Advisory Board \(CAB\)](#) program because they don't have a relationship with the key executives they want to invite. Obviously, CABs work exceptionally well when those key executive-to-executive relationships are already in place. Yet when those relationships do not yet exist, *especially because those relationships do not yet exist*, the CAB is one of the very best programs to initiate. CABs are about relationships. When all else fades to becoming a commodity, the relationship with your customers will be the only remaining differentiator.

### **But, how do you invite senior decision makers you do not yet know?**

As a marketer, none of us want to plan a party and then have no one show up. This is a deep seated fear that most of us have. It's natural. Now, get over it. Success is completely in your grasp. Here are three best practices to guide you when courting CAB invitees.

#### **1. Believe in the self-fulfilling prophecy**

Great CABs don't just happen. They happen because the executives and CAB managers who run them know they will be successful. Senior executives invest their time and energy to invite the right level folks. CAB managers plan months ahead to develop a topical and relevant agenda for the attending customers; they exude excitement and commitment in every communication with these customers. It's so important, the CAB program should be personally owned by a CMO or a VP – not shunted down to an event coordinator.

Similarly, I have seen many CABs crash and burn because the executive sponsor or the CAB manager was not really committed to it. They built an agenda based on content that was available rather than what was appropriate. They took short-cuts to get a certain number of people to attend, forgetting that a CEO sitting next to a first-line manager would be awkward at best and catastrophic at worst.

Whether they thought their CAB would succeed or fail, they were 100% correct. Have you read "The Power of Positive Thinking" by Norman Vincent Peale, or watched "The Secret" DVD, or heard Wayne Dwyer talk about the "power of intention" on PBS? Whether you believe it or not, attitudes about everything play a huge role in our ability to generate success. This is most definitely true for CABs, as well.

## **2. A personal invitation from the “desk of the CEO”**

CABs are not about generating "butts in seats." Each attendee must be carefully selected to ensure that the right level of decision maker from the right company is attending the CAB. Since most CABs limit customer attendees to between 12 and 16 participants, each and every seat is of high value. The secret to success here is in one-on-one marketing -- from your executive to theirs.

Yes, the initial invitation is best when it is an old fashioned, hardcopy letter on company letterhead. There is no short cut: CABs require executive-to-executive communication. Form letters will go unread, however a simple but formal-in-structure letter signed by the CEO is a good way to show respect and initiate a new relationship. But don't send it by mail. Instead, have the invitation letter hand-delivered by the local sales rep servicing this customer account. (Consider that the CAB invitation letter is the perfect reason for the sales rep to set foot in the target executive's office!)

To be sure, many CAB managers will ghost write the invitation for the CEO or the CAB's executive sponsor. Remember: CABs are unique, special events where a small targeted group of executive leaders get together to talk about business drivers, trends, and directions. They absolutely value opportunities to step away from the office to compare notes with their peers. Why then would you send an email invitation from a low level event manager to introduce the CAB? Nothing says "our time is more valuable than yours" when you take this short cut.

Along with the invitation letter, include a one-page overview of the CAB program, its central objective, the value attendees will receive, and without giving out names, provide an overview of the caliber of the other attendees. End the letter with a note that a representative from the CEO's office will follow-up via phone and email to further discuss the program and answer questions.

## **3. It's (always!) about the agenda**

Those companies who have the most successful CAB meetings have one thing in common: dedication to building the most relevant and meaningful agenda. It may seem counter intuitive, but the focus of the agenda must be on the customer, their pain points, their business challenges, and their vision of their future. The purpose of the CAB is to get these companies to compare notes and share insights that will help you service their business needs better. With that in mind, the agenda is more about "customer research" than promoting your own brand. (This is a hard lesson for novice CAB managers to understand.)

With regard to the agenda, consider that many companies develop theirs between three and six months prior to the CAB date. In fact, the #1 piece of positive feedback I see consistently on CAB evaluation forms has to do with the relevancy and richness of the agenda. Not the food. Not the luxurious accommodations. (Note: Even the best food or a free round of golf will not make up for a poor agenda.)

*Proper CAB agenda items include topics such as:*

- Business drivers shaping your customers' IT decisions over the next 3 years
- Trends affecting user adoption (where the "user" is your customers' customers)
- New and changing priorities for your customers' businesses

Of course, as the host company, you're interested in the answers and the implications relevant for your business. With this in mind, it is very appropriate (and expected) that the conversation will include questions and perspectives relevant to your roadmap and current/future product offerings. That's okay. But be mindful not to overload the agenda with what you think. You want to know what the customers think. As a rule of thumb: follow the 80/20 rule where customers speak 80% of the time, and you speak only 20%.

*However, CAB agenda items should never include:*

- An overview of your company's corporate/brand presentation
- A lecture on your short-term product roadmap (especially where your decisions have already been made)
- A tutorial on product use cases or feature functionality
- A sales presentation

### **Taking the best first step**

When designing or refining your CAB program, world-class companies always keep the customer in the center of their universe. It's too easy to say "we don't currently have the executive-to-executive relationships we want, therefore the CAB doesn't fit." That may not be true. Your company's strategic goals will help you decide if a CAB is right for you. If success requires deeper executive-to-executive relationships, then there is nothing better than kicking off a new CAB program.

For more insights on CAB best practices, check out these resources:

- [\*\*Are you getting strategic insight from your best customers? Customer Advisory Boards help you validate and refine your product direction\*\*](#)
- [\*\*CAB or no CAB? That is the question\*\*](#)
- [\*\*Customer Advisory Boards: Frequently Asked Questions\*\*](#)

### **About the Author**

Mike Gospe is one of the founding members of the KickStart Alliance ([www.kickstartall.com](http://www.kickstartall.com)), a team of senior marketing and sales leaders who assist companies of all sizes to develop and execute a variety of marketing and sales programs. Since 2002, Mike has led KickStart's CAB practice. Our CAB methodology and facilitation style has been put to use by companies such as Aspect, BEA, Citrix, HP, Informatica, Sun, Trend Micro, Tumbleweed, and many others. Mike holds a BSEE and an MBA from Santa Clara University.