



## NEWSLETTER - Customer Advisory Boards

I have had the opportunity to manage customer advisory boards for both Avaya (Contact Center Business Unit) and CSC (Global Infrastructure Services Business Unit). For me, the professional and personal collaboration with members has been a highlight in my career. Although they were each run a bit differently, there were common lessons learned.

### Customer Advisory Boards - **What Has Worked**

**Peer Sharing:** A key benefit for members is to connect with peers with similar scope of responsibility in order to share lessons learned on common challenges and opportunities. Diversity, including different industries, brings valuable perspectives. To create a trusted environment for sharing, customer advisory boards are typically confidential. Having a process to add new members brings in fresh ideas.

- Challenge: With everyone's time at a premium, sponsor companies sometimes try to fit a lot into the agenda to leverage the opportunity with members. It is critical to build in time for more casual peer to peer discussions over longer breaks, dinner, or an event.

**Long Term Relationships:** In addition to peer discussions, members value direct engagement with executives on strategic direction, roadmap/launch previews, perspectives on solving common challenges, etc. Members and executives have built long term relationships beyond the meetings and some members have become advocates.

- Challenge: Aligning several executive schedules and creating a meeting environment with minimal interruption is challenging. It is important to have a consistent executive presence over a period of time. Meeting cadence varies but a couple of in-person events combined with virtual updates keeps collaboration going. To minimize interruptions, it is best to hold meetings at a facility other than a company location.

**Brainstorming (co-creation):** Some of the most valuable ideas come from lively discussions among members when the discussion is allowed to evolve with members building on each other's comments and going down unexpected paths.

- Challenge: It is a challenge for the facilitator(s) to create the optimal balance of structure while still allowing for open discussion. One idea is to provide pre-meeting materials (keep to a minimum) with some key questions to frame the topic(s) for feedback. Another challenge is the "right" number of attendees to enable all to participate, yet have enough to create different viewpoints. I have found fewer than 6 and more than 12 is not as effective.



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### Customer Advisory Boards - **What Has Not Worked**

**Sales Pitch:** There is a time and place for sales discussions. Customer Advisory Boards at the CEO, CTO, or Business Unit level are typically focused on strategic level exchanges with a couple of executives and a targeted group of clients/prospects. Customer Advisory Boards should be a “no sales zone”.

- Recommendation: Create a process to follow-up with sales and other teams with key excerpts from the discussions to help drive next steps.

**Individual Issues:** Sometimes customers have a pressing problem they have been working with key stakeholders, but want to bring it to the attention of an executive. Customer Advisory Board meetings with several members are not the best place to bring up company specific problems.

- Recommendation: It has been effective to interview members before the meeting to understand any issues, get input on the agenda, and understand their current and future opportunities and challenges. Identifying unresolved issues before the meeting from these interviews and from sales teams briefings allows executives to talk privately with the customer on the latest status. If interviews uncover a common issue across members, then executives can address this at the beginning of the meeting.

**Company Focus:** Although the sponsor company gains valuable feedback from customers on strategy, roadmap, value propositions, etc., it is important to spend as much time (or more) listening to feedback.

- Recommendation: It has been beneficial to invite third party experts (including industry analysts) to present a viewpoint on market trends and facilitate a discussion. It has also been valuable to have members present their stories to each other. Demos have also been effective to get members engaged in “hands-on” experiences vs presentations. A summary of follow-up actions taken from previous meeting feedback is important to include at the beginning of each meeting.

Let me know of your customer advisory board experiences that could benefit others so I can include in an upcoming newsletter (marshall@reedstrategies.com).



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### APPENDIX

Note: Additional market research, analysis, and key message summaries will be included in 1Q2017 RS Market Research Insights report (end of March).

### **Future of Work (4Q2016 report): Sample Market Coverage in February**

- (Fast Company) The Digital Nomad's Guide To Working From Anywhere On Earth  
<https://www.fastcompany.com/3068312/secrets-of-the-most-productive-people/the-digital-nomads-guide-to-working-from-anywhere-on-earth>
- (Fast Company) What Accelerators, Incubators, And Hackathons Tell Us About The Future Of Business  
<https://www.fastcompany.com/3068304/most-innovative-companies/what-accelerators-incubators-and-hackathons-tell-us-about-the-future>
- (PR Newswire) The "Gig" Economy Will Impact Corporate Real Estate And The Future Of Cities  
<http://www.prnewswire.com/news-releases/the-gig-economy-will-impact-corporate-real-estate-and-the-future-of-cities-300411818.html>
- (Huffington Post) The Future of Work: Get Plugged In  
[http://www.huffingtonpost.com/entry/the-future-of-work-get-plugged-in\\_us\\_58adfc28e4b0ea6ee3d034f1](http://www.huffingtonpost.com/entry/the-future-of-work-get-plugged-in_us_58adfc28e4b0ea6ee3d034f1)
- (Inc) Why Do Offices Still Exist?  
[http://www.inc.com/jacob-morgan/why-do-offices-still-exist.html?inf\\_contact\\_key=94984226d3542627924e6abe47bdb3f4330e03948331a25903c51f7db84f5b34](http://www.inc.com/jacob-morgan/why-do-offices-still-exist.html?inf_contact_key=94984226d3542627924e6abe47bdb3f4330e03948331a25903c51f7db84f5b34)
- (Accenture Strategy) Harnessing Revolution - Creating the Future Workforce  
[https://www.accenture.com/us-en/insight-future-workforce-today?c=strat\\_ssmcfy17lkd\\_10000204&n=smc\\_0916](https://www.accenture.com/us-en/insight-future-workforce-today?c=strat_ssmcfy17lkd_10000204&n=smc_0916)

### **Customer Service Experience (1Q2017 report in March): Sample Market Coverage in February**

- (Business 2 Community) Top 10 Leading Customer Experience Trends for 2017  
<http://www.business2community.com/customer-experience/top-10-leading-customer-experience-trends-2017-01780179#uYuheGkJYiHYDeA9.97>
- (Business 2 Community) 5 Important Trends in Customer Service Expectations  
<http://www.business2community.com/customer-experience/5-important-trends-customer-service-expectations-01784575#ywQOcwHhzhVvkGpjf.97>
- (Fonolo) Top 10 Customer Service Trends for 2017  
[https://fonolo.com/blog/2017/02/top-10-customer-service-trends-for-2017-whitepaper/?ls=web\\_linkedin](https://fonolo.com/blog/2017/02/top-10-customer-service-trends-for-2017-whitepaper/?ls=web_linkedin)
- (LinkedIn) How to Keep a Customer Loyal Forever. Yes, Forever. Seriously.  
<https://www.linkedin.com/pulse/how-keep-customer-loyal-forever-yes-seriously-don-peppers>