Customer Advisory Board (CAB) Manager Training Agenda

DAY 1

12:00-1:00pm LUNCH*
(Joint lunch with outgoing CAB Facilitator Training participants)

1:00–1:30pm WELCOME, INTRODUCTIONS & OBJECTIVES

1:30–2:30am CAB OVERVIEW
Definition, benefits, types, maturity levels, engagement spectrum, internal positioning (product marketing/customer experience/research/insights), key challenges, overall best practices

2:30-2:45pm BREAK

2:45-3:45pm SETTING THE RIGHT CAB OBJECTIVES AND CREATING RELEVANT ROI METRICS
Alignment to business strategy, creating a powerful theme, mutual benefit concept, CAB evolution model, securing executive sponsorship, realizing executive alignment, success metrics and KPIs, CAB impact model – Breakout Groups and Readouts

3:45-4:45pm CAB DESIGN, INFRASTRUCTURE AND PROJECT PLAN
How to design the charter: what are the key considerations and decision points in terms of members, content, meeting, impact and follow through. Roles and responsibilities for different phases, progress reports, communications infrastructure, branding considerations

4:45-5:00pm WRAP UP DAY 1

5:30-7:00pm NETWORKING HAPPY HOUR
Location TBD (cash bar)

DAY 2

8:00–9:00am BREAKFAST*

9:00–10:00am MANAGING THE RECRUITMENT PHASE
Member selection criteria, recruitment process, recruitment documentation and collateral – Group Discussion

10:00–11:00am AGENDA CREATION AND PREPARING FOR THE CAB MEETING
On-boarding process, agenda creation process, creating a relevant discussion guide, content development, key milestones, internal preparation prior to meeting, the meeting kit
Group Discussion

11:00–11:15am BREAK

11:15am–12:00pm MEETING FACILITATION, INSIGHTS REPORT, ACTION TRACKING
Facilitation guidelines, facilitation process, role of the facilitator, moderation techniques, interactive exercise, meeting insights report, tracking key actions

12:00-1:00pm LUNCH*

1:00–2:15pm MANAGING THE CAB FOR OPTIMAL PERFORMANCE
Engagement plan, subcommittee charter and structure, optimal interaction cadence and frequency
Group Discussion

2:15–2:30pm BREAK

2:30–4:00pm MANAGING THE CAB FOR OPTIMAL PERFORMANCE (CONTINUED)
Member ranking, member rotation, CAB online communities, leveraging CAB value, marketing deliverables, managing multiple CABs
Group Discussion

4:00–4:30pm WRAP UP AND FEEDBACK

* Breakfast and Lunch are included for all participants.

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