



# Customer Advisory Boards

## *Harness Outside Innovation:* Engage Your Smartest Customers to Co-Design the Future of Your Business

### OVERVIEW

The best way to gain and keep a competitive edge is to engage your smartest customers in helping you plot your course. Your customer advisory board should be a “safe space” in which your most thoughtful, insightful and creative customers prod your executives into thinking “out of the box.”

The key is to find, recruit and nurture your “lead customers” — the people who need different and better solutions than the ones you currently offer, as well as your “consultants” — the customers and prospects who have the best ideas for improving and growing your business. Then, harness their passion and their wisdom to co-create new approaches, define new business models, identify new markets and discover different delivery channels.

Don't just pick their brains. In addition, take these steps:

1. Co-design new business processes, opportunities and solutions by teaming these passionate advisors with your top executives and subject matter experts to work side by side to co-create their ideal solutions and experiences. Turn your advisory board meetings into customer co-design sessions.
2. Identify your customers' ideal outcomes and their critical success metrics. Use *their* success metrics to drive *your* operational metrics.
3. Continue to keep your advisors engaged in between face-to-face meetings. Have them critique your road maps.
4. Provide a private on-line community site for your advisors and encourage them to provide new ideas and insights and to continue to dialog with one another about topics of mutual interest. Get your top execs engaged with these lead customers, picking their brains and asking for their feedback anytime they need to take a quick pulse.
5. Give your lead customers tools they can use to extend your intellectual property and to better meet their own context-specific needs. Encourage them to contribute their inventions and to recruit complimentary players into your customer/partner ecosystem.

### In a Nutshell

- Identify your most insightful customers.
- Get them working for you!
- Co-design ideal solutions and processes with them.
- Unleash their creativity.
- Revitalize your business!



Lead  
Customers



Customer  
Consultants

6. Tightly integrate your customer advisory board activities into the rest of your Voice of the Customer (VOC) and Quality of Customer Experience (QCE<sup>SM</sup>) initiatives.

Combine:

- Customer Advisory Boards
  - Customer co-design sessions
  - Customer metrics to drive operational metrics
  - Private customer communities
  - Tools for customers to extend your intellectual property
  - Customer usability testing
  - Customer experience transactional surveys
  - Customer satisfaction and loyalty surveys
7. Evolve your CAB by adding new members to replace less insightful or passionate customers over time. Spawn new Customer Advisory Boards for different communities of practice among your customer and prospect base. Dissolve specific CABs at any time that they become less than strategic for you and your customers.

## **BENEFIT FROM OUR PROVEN METHODOLOGY FOR CUSTOMER-LED INNOVATION**

**We'll Screen & Recruit Insightful, Visionary Customers.** Use our 20-year proven methodology to identify, recruit, and engage your most insightful customers within a common community of practice. These are customers who care about the same things, have the same roles and context and share similar goals. They'll bond around common issues and common visions. Your executives will gain tremendous insights through deep listening.

**We'll Unleash their Creativity.** We'll listen deeply to your customers before each meeting to surface their common vision and issues. We'll hand-pick customer teams and partner them with teams of your executives and subject matter experts to co-design new approaches, solutions, processes and brand experiences.

**We'll Co-Create Operational Scorecards.** Together, we'll discover your customers' critical path issues and get them to specify their success metrics for each. We'll select a handful of customer-critical metrics to meet or beat and develop operational metrics you can monitor and improve, enablers that will allow you to deliver on those metrics, and a business case for each.

**We'll Nurture their Dialog and Co-Creation between Meetings.** Your customer advisors have a lot to contribute to one another and to you between formal meetings. They'll continue to have insights and ideas. They'll be waiting and eager to help you refine and execute on the solutions you co-designed; both the easy, low-hanging fruit as well as the more strategic investments. We can help you deliver tools that will help them reach their goals while contributing to your capabilities.

## **CONTACT US TO LAUNCH OR REVITALIZE YOUR CAB PROGRAM**

Make your CAB meetings catalytic, rewarding and memorable events. Make sure that each one delivers actionable, measurable and dramatic results. Your advisors will look forward to the next meeting. They'll hold your feet to the fire in between meetings. Contact Patricia Seybold by email ([pseybold@customers.com](mailto:pseybold@customers.com)) or phone: 617-742-5200 to discuss your CAB strategy.