



A client advisory board

- the voice of your customer -

What do your customers think about you? And where do they want your business to take them?

Do you realise that customers are evaluating your business every time they buy from you, use your services, or receive an email, phone call or even an invoice? Do they speak positively about your business? Do they talk about you at all? Or even worse, do they bag you to other potential clients?

Hopefully your products or services are living up to expectations and your customer service is equally good. Even if you tick both boxes, there are always ways to improve what you offer and broaden your client base. Complacency is ignorance. As the world evolves at a rapid pace you must stay ahead of the game.

Running a client advisory board is a great way to get an accurate indication of how well your business is doing. It will also establish what is necessary to raise your standards or continue delivering real value.

What is a client advisory board?

A client advisory board or CAB is an organised meeting with a number of your business customers or clients – facilitated by a neutral party. The facilitator will ask your clients a number of predefined questions about how well your business is operating and how it could operate in the future.

Hosting a client advisory board could be a turning point for your business and the beginning of great things. Based on the intensity of customer feedback, you'll know which business issues need to be addressed and in what order. Beyond that, you can develop and implement some fresh products or strategies and your team will be more motivated than ever.

Planning the event

So you're taking the plunge to get an honest view of how your clients see your business. It's important to plan now to ensure that you (and your clients) get the most out of this important meeting. Consider your clients when deciding on a time and date - what is going to suit them, and what will make it worth their while? The meeting should take around 2.5 hours.

What are your key objectives?

This will depend on the reasons behind your decision to host a CAB: Have sales dropped lately? Have you been receiving customer complaints? Has business boomed and you wish to continue your growth to secure your place in the market? Clearly define your objectives in order to define your questions.

Define your questions. Some sample questions might be:

- What is it that we do exceptionally well?
- Do we have enough meaningful contact with our customers?
- Do all staff offer the same standard of customer service?
- Has there ever been a moment when you felt strongly supported by or conversely strongly let down by us?
- How frequently do you refer new business to us?
- Have you ever used a competitor, and what prompted that?
- What are some other services / products that would make your life easier, or more profitable?
- How strongly do you rate our brand?
- How knowledgeable do you find us?
- How do you find our billing system and or returns policy?
- How do you find our communication systems?
- If we could improve two things, what would they be?

Pre-planning order of events:

- Find a suitable venue - a boardroom of some description
- Invite between eight and twelve customers by mail or email two to three weeks in advance. Allow for some to decline
- Confirm with customers two to five days before meeting
- Brief your facilitator on the CAB questions, provide an attendee list with business profiles, and paper for notes.

On the day you'll need:

- Audio recording equipment (to review the meeting later)
- Water, mints, pens and writing paper for the table
- Refreshments and snacks on arrival and departure (either breakfast, morning tea, lunch, afternoon tea, or depending on timing, dinner)
- Name badges for everyone (in a large font for ease of reading).

Order of events on the day

When the day arrives you'll have a diverse set of people in one room. Small clients, big clients, new and longstanding clients, and clients from different locations. You'll have a nice slice of your target groups to cover a range of issues.

Welcome your guests and introduce the facilitator. It's best to do this in a relaxed manner over tea / coffee and perhaps a light snack. Let your audience know that the meeting will be audiotaped and that the facilitator will be taking notes throughout - highlight your commitment to providing them with an improved customer experience. Explain the overall process of the day and be sure to thank everyone in advance for their participation.

After the meeting, join the group to relax over lunch or dinner and listen attentively without asking probing questions. Reiterate your gratefulness for their involvement and that you'll be in touch.

Dissecting CAB feedback

Immediately after the schmoozing, meet with your facilitator to go over his / her notes while the event is fresh. Next, go over the audio to extract and document the positives and negatives to marry with the facilitator's notes. Go through the audio a second time to be sure you haven't missed anything. Involve your key team members and discuss how you plan to tackle the hairy issues. Prepare a report to communicate your follow-up action steps to CAB participants.

Show your appreciation

Send a thank you card and a small gift to each of your CAB clients. Make it personal, you may like to reference a great suggestion they made. Emphasise that you will keep them informed of the outcomes.

Implement change - get your team on board

Relay (and thank your team for) the positive outcomes from the meeting. Without pointing fingers discuss the negatives and ways to address each issue - order them by importance as well as turnaround time. End on a positive note by discussing any exciting ideas that arose from the meeting - focusing on how you can boost the business into the future.

Who will be in charge of making each positive change happen? Formalise your business plan. Implement some simple, workable suggestions straightaway to show customers that you're committed to change. Your team will respond positively to new responsibilities and be held accountable to a whole new level of customer expectation. Reward them as they rise to the challenge.

Update your CAB clients

Send them a report to outline:

- The issues that were raised
- The actions required to address each issue
- A deadline for when each issue will be dealt with
- Exciting ideas you hope to implement shortly.

Ask them for any further feedback. How valuable did they find the experience? In future would they be willing to help again?

Then it's time for you to follow through on your promises and put your money where your mouth is.

Thinking of running a CAB?

CABs are invaluable in getting information to strengthen your business. For instance:

- Thinking of a new product line or service offering?
- Wish to attract new clients in a different demographic?
- Feeling out of touch with clients - relationships weakening?
- Recently had bad feedback or disgruntled customers?