Customer Advisory Boards: Don't Make Decisions in a Vacuum

As product and client teams grow and a company matures, it comes important for companies to develop formal client advisory boards to solicit objective feedback and better understand the client's point of view.

Yet too often, our clients don't know how to begin or make some of the most common mistakes related to client advisories. Follow our seven tips below to make sure you're going about it the right way … and getting the most out of your customer advisory board.

1. PICK YOUR CUSTOMERS WITH CARE

Just because a customer wants to be on the board doesn't mean they should. Look at your client base as objectively as possible to identify a good mix of advocates, critics, and neutrals. You also want to get as much of a mix of SMB, Enterprise, and Fortune level contacts as possible. Finally, try to get senior-level contacts, too – their experience will help you the most.

2. AT THE SAME TIME, STICK TO A LIMITED NUMBER OF PARTICIPANTS

As the process evolves, it's natural for other customers to hear about it, or for client-facing employees request that new customers become part of your board. That's fine to a certain degree, but don't let them get so large that they become counter-productive. Create the magic number and stick with it.

3. WHEN IT COMES TIME TO MEET, DON'T WING IT

Too many organizations treat customer advisory board meetings as just another meeting or worse, conference call. This means they tend to under-prepare and rationalize with the mindset of, "I know these clients and it's really pretty informal. I don't need to do much more than kick it off."

Nothing could be further from the truth. Remember that these customers are busy and are doing this as a favor to your organization. By demonstrating a lack of preparation, you are risking feedback, or worse, continued participation. Prepare before – participants will appreciate it and want to be part of more advisory sessions.

4. MAKE SURE EVERYONE KNOWS THEIR ROLE

Before each call, establish some ground rules and remind the customers about their role. Too often customers think this is a chance to vent, complain about their account person, or request a specific feature. While all of this is valid, you're looking for objective information. While this type of detail is good to know at a summary level, you don't need to get into specifics during the advisory meeting.

5. DON'T PITCH!

At the same time, it's important that your employees understand their role, which usually means they should refrain from pitching new products or being overly promotional. Clients don't appreciate it, especially when they think they're there to be an advisor.

6. BUILD CUSTOMER FEEDBACK INTO THE AGENDA

Like any presentation, most people err on the side of not leaving enough time for questions or feedback. By definition, a customer advisory board is designed to solicit client advice, so build a lot of time into the agenda to collect their feedback and advice. Also, be sure to ask plenty of questions at different points of the conversation.

7. ACT ON THE FEEDBACK

Finally, do everything you can to act on the clients feedback and demonstrate evidence of this follow-through to them. Nothing is more frustrating for clients than to make a specific recommendation only to have the company ignore it. Even if your company doesn't take the suggestion, it's a good idea to follow up with them and let them know you considered it and explain the rationale for your decision.

The 190west Advantage

190west knows that customers make all the difference and is ready to help your organization build a customer advisory board – quickly, easily, and effectively. Make sure you know the critical customer advisory board best practices – as well as the mistakes to avoid