



Connect with Customers

CABs and Other Customer Interactions

LEVERAGE A VARIETY OF CUSTOMER INTERACTIONS

Create the following customer touch points throughout the product and business lifecycle:

- Customer Advisory Boards
- Customer Summits
- Ideation Sessions
- Focus Groups, In-Depth Interviews, and other qualitative market research
- Customer Engagement Tools/Systems

GENERATE DIRECT CUSTOMER INPUTS AND FEEDBACK

Clearworks has a full range of innovation and facilitation techniques that generate rich interactions and fresh thinking across all of your customer programs to impact a variety of business decisions and strategies.

- Business Strategy
- New Opportunities
- New or Enhanced Products/Services
- Customer Support Programs
- Customer Experience Design
- Process Redesign

Let us help you engage your customers in fresh and creative ways—uncover new opportunities, generate the next big idea, and sharpen your business strategies. Contact our team today at 888-769-3807 or info@clearworks.net.

- How do you engage with customers and generate rich insights?
- How do you leverage customer feedback to develop new and innovative business strategies, products and services?
- How do you develop effective programs for all segments of customers?

“Clearworks’ facilitation of our Customer Summit allowed us to generate rich feedback from our customers on our new product. The day proved invaluable for shaping our product development efforts.”

Mel Badgett

VP of Product Management, Krugle

“The Clearworks team has outstanding facilitation skills. They developed and managed a series of interactive sessions that were critical in gathering essential, substantive feedback from our customers. They kept the meeting lively and engaging, generating positive feedback from execs and customers alike.”

David Spenhoff

Vice President of Marketing, Trend Micro

Customer Advisory Boards and Customer Summits

CUSTOMER ADVISORY BOARDS

If you are new to CABs or want to revitalize your CAB program, Clearworks can help you develop a CAB program at either the executive level or the product and user level.

CAB PROGRAM DEVELOPMENT

- Design and development of an ongoing sustainable program (program objectives, benefits, membership recruitment)
- Stakeholder and customer research and feedback to ensure a program that suits the customer needs and the business objectives

CAB PROGRAM DOCUMENTATION

- CAB Program Kit that includes documentation to support your program including checklists and best practices
- Internal communications program/change management that includes employee communications and training around the new program
- Customer Messaging including communications samples and a program marketing piece to help in recruiting efforts

CAB Meeting

- Objective setting with Stakeholders to ensure you get the most from having your customers in the room
- Agenda Development including development of breakout sessions using interactive tools and techniques designed to meet your objectives and keep the customers engaged
- Development of all sessions including preparation of exercises, discussion guides, pre-session materials for customers
- Professional facilitation of the meeting
- Reporting designed to provide actionable recommendations for your business and product strategies including a post meeting survey

CUSTOMER SUMMITS

If you are not sure yet whether you want to dedicate time and resources to a full ongoing CAB program or you want to test customer reaction to a CAB program, consider a one-day Customer Summit.

This is a one-time event designed to gain feedback from customers and to gauge their interest in a CAB program.

ONE-DAY EVENT

- Kick off strategy session to define event
- Assistance with event recruitment
- Customer Messaging and Communication Materials
- Objective setting with Stakeholders to ensure you get the most from having your customers in the room
- Agenda Development including development of breakout sessions using interactive tools and techniques designed to meet your objectives and keep the customers engaged
- Development of all sessions including preparation of exercises, discussion guides, pre-session materials for customers
- Reporting designed to provide actionable recommendations for your business and product strategies, including a post-meeting survey