

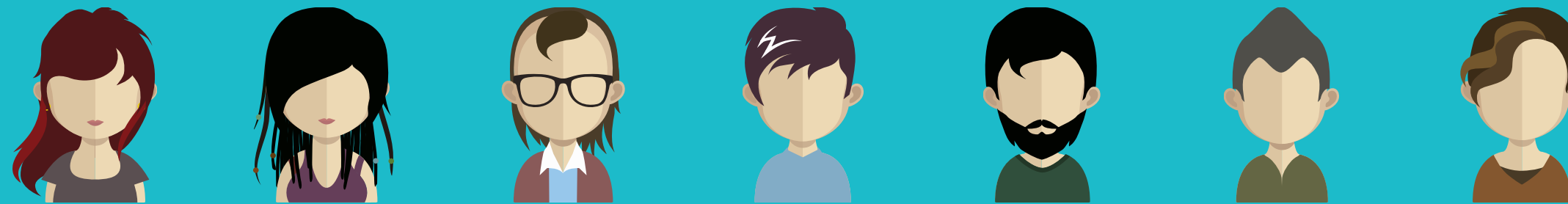


Consumer Insights

Customer Advisory Board

Customer Advisory Board

A group of existing customers that meet with Consumer Insights on a regular basis to help advise the company on industry trends, business priorities, and strategic direction.





Benefits

Engaging with the CAB will help us...

- Understand competitive offerings
- Improve existing products
- Validate new ideas
- Prioritize a customer first roadmap
- Test-Drive upcoming releases
- Gain merchant industry expertise



Composition

- 10-15 Customers that represent a cross section of our customer base (Balance: Industry, Frequency of Use, Use-Cases)
- Individuals who have an understanding of their company's needs, priorities, and directions
- A few customers who have voiced strong complaints in the past
- Individuals who are capable of communicating their ideas in a group setting



Frequency and Format

- **Quarterly Meeting**
 - All members
 - Teleconference / In-Person
- **Monthly Outreach**
 - All members
 - Survey, Email
- **Ad Hoc**
 - Select members
 - In-House User Testing, Surveys, Phone Interviews



Recruiting

- Work with Product management to identify the ideal profiles and make up of the board
- Work with Customer Happiness, Sales, and the Key Account Management teams to identify existing customers who may fit our needs
- Carefully map out target members, and categorize them by Tier 1, and Tier 2.
- Create a professional and sincere recruitment letter from our CEO inviting the prospective member to the board, highlighting some of the key benefits
- Identify who has the strongest relationship with the individual prospects, and assign a recruiter to reach out to them

Kick Off Meetings - Week of December 10

- Mathilde and Product Management to finalize Composition
- Darinka and Key Accounts to begin identifying potential customers
- CAB Charter Meeting - TBD Stakeholders
 - Welcome Statement
 - Overview
 - Mission
 - Scope
 - Objectives
 - Member Benefits
- First CAB Quarterly Meeting planning



Resources

- Starting a CAB best practices
<https://community.uservoice.com/blog/starting-customer-advisory-board-best-practices/>
- Tips for Recruiting Customer Advisory Board members
<https://www.igniteag.com/tips-for-recruiting-customer-advisory-board-members/>
- Oracle's Customer Advisory Board Charter
<http://www.oracle.com/technetwork/middleware/reports/bi-cab-charter.pdf>
- Tips to Run An Effective Customer Advisory Board
<https://www.gainsight.com/2016/01/05/7-tips-to-run-an-effective-customer-advisory-board/>
- Customer Advisory Board Organization
<https://www.customeradvisoryboard.org>

UX / Consumer Insights

Priorities





Current Initiatives

<https://trello.com/b/vgp07g3j/consumer-insights-backlog>

- Staffing Plan and Recruitment - *In Progress*
- Square Feature Parity Teardown - *In Progress*
<https://payclip.atlassian.net/wiki/spaces/UX/pages/84705366/Square+Up+-+Payment+Processing>
- Analysis of Square Features - *In Progress*
 - What are the use cases or jobs being fulfilled
 - What's different about the Mexican market as related to each feature
 - How would Clip's Execution be different?
 - How do we know Clip should do it differently?
- Persona Discovery - Who are our Users?
<https://trello.com/c/dox1xvYq/10-who-are-our-users-persona-discovery>
- Form Customer Advisory Board (CAB) - *Kicking Off*
- Square Feature Card-Sort w/ Product Management
<https://trello.com/c/x3Ooodqe/3-square-feature-card-sort-with-cab>



Consumer Insights

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Consumer Advisory Board
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UX Manager

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