Client Advisory Boards

Put You In Touch With Your Clients and Marketplace

By Lisa A. Rozycki

While not a form of formal marketing research, a client advisory board (CAB) is an opportunity for any professional service firm to listen to their clients' comments on how they really feel about the firm and the services it offers. Every firm's goal is, or should be, to provide clients with the very best client service. In order to accomplish that, management needs to know what the key client issues are and come up with a plan on how to alleviate them, if possible.

A CAB can put your firm in touch with your marketplace to gather meaningful information on where the firm stands in the minds of your clients on everything from your receptionist to your reputation in a specific niche.

The steps necessary to organize a CAB include selecting a facilitator. An outside facilitator is the best person to conduct the CAB because clients usually feel free to say whatever is on their minds when there is no firm representative present. The facilitator's job is to make sure the CAB runs smoothly by directing the flow of information and asking significant questions. Partners usually make the introduction of the facilitator and then leave.

Organizing A CAB

When selecting a location, choose a place that is neutral so that clients don't feel they've been summoned to the firm's offices. Consider a hotel, conference center, or private country club near the office. If they are traveling a good distance, select a central location.

Decide on the length and time of the meeting. A typical CAB runs from two to four hours with the partner group joining the clients afterwards for dinner or a cocktail hour.

In deciding how many to invite, the number of clients typically ranges from six to twelve people. Keep the number of participants small enough to make sure the group is manageable and each person has a chance to speak.

When selecting whom to invite, consider your "A" clients. "A" clients are typically more enthusiastic about the firm, pay their bills on time, take pleasure in the relationship they have with the firm, refer others to the firm, and overall are a joy to work with. They have a genuine interest in helping the firm and will be positive in their participation.

Four to six weeks prior to the date, send an invitation letter, or have each client's firm contact call the person you *really* want to participate. If you are including a special dinner or cocktail hour make sure that information is conveyed so clients can plan ahead. Approximately one week later, call each person who has not responded to gain commitment. Send invitations to alternates as required and follow up with them one week later.

Two weeks before the CAB, verify that you have all of the supplies—nametags, table tents, tape recorder, tapes, tablets, pens, etc. Five days prior to the event, call each participant to reconfirm his or her participation. Send maps or directions and confirm special meal arrangements if necessary. Three days prior to the event, reconfirm all details with the venue.

If you are the facilitator of the meeting, make sure you take good, clear notes in order to provide feedback to your management group. After the meeting, listen to the audiotape and summarize the CAB findings.

Distribute the report and consult with your management group on strategies to incorporate as a result of the findings.

Once the facilitator reviews the information provided during the CAB, an action plan should be written and the participants should be sent a list of strategies that the firm has incorporated as a result of the event. This is a very important step in order to let them know that they've helped you and the time they spent participating was meaningful to the firm.

Lisa is the founder and Principal of LR Marketing Group, a marketing consulting practice specializing in growing revenue of professional service firms through market analysis, planning and implementation, public relations, lead generation, and business development. Lisa has 24 years of marketing experience including 8 years as a marketing director in the public accounting industry. For more information on Client Advisory Boards, including typical questions a facilitator asks during a client advisory board meeting, contact Lisa A. Rozycki at 610-582-0097 or lisa@lrmarketinggroup.com.

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