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The Executive CAB Launch Planning Guide

How to Design and Run a C-Level Customer Advisory Board in B2B SaaS

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What this guide covers

- ICP and title criteria for executive-level CAB members
- A week-by-week planning calendar: kickoff through your second summit
- The 1.5-day summit run-of-show: Day 0, Day 1, and Day 2 agenda templates
- White-glove logistics and experience design principles
- Executive onboarding interview questions
- The 5 mistakes that undermine credibility with a C-level room

Why an Executive CAB Is a Different Program

Most executive CABs fail because companies treat executives like attendees instead of strategic peers. The member profile, the logistics bar, the agenda design, and the relationship model are all categorically different.

When you invite C-level and VP+ executives from enterprise accounts to spend 1.5 days with your company, you are asking for their most limited resource: time and attention. The experience you design has to justify that ask before they even arrive. Mediocre logistics, generic agendas, or any hint of a sales pitch will not just fail to impress – they will actively damage the relationship and your company's reputation in the executive networks these people move in.

Done right, an executive CAB is the highest-trust customer relationship your company can build. The executives in that room become co-owners of your strategy, internal advocates with their boards and peers, and the reference network that opens doors no sales team can open.

What Executive Members Actually Value:

- Peer access to other enterprise leaders
- Strategic conversations they cannot get at conferences
- Influence over product and market direction
- Access to your executive team
- Early visibility into industry shifts
- Relationship capital with other operators

Practitioner CAB vs. Executive CAB: key differences
Member profile: VP to C-level at enterprise accounts vs. mixed titles
Format: 1.5-day destination summit vs. half-day on-site
Logistics bar: White-glove end-to-end vs. standard venue booking
Agenda depth: Strategic bets and market-level questions vs. product-level topics
Sponsor level: C-level (VP+ in larger organizations) vs. or Director
Communication and follow-through: Personalized, CEO-signed vs. program-level summary

Member Criteria: The ICP and Role Standard

The quality of the room determines the quality of the insights, relationships, and long-term influence your CAB creates. Executive CAB membership is not a reward for being a good customer. Rather, it is a strategic selection based on the quality of advisory input they can provide and the influence they carry in your market. Getting the membership right will not only benefit you – but also all the attendees. Building a trusted network among high-caliber individuals is absolutely a benefit of participating in a program like this. Apply these criteria before you name a single candidate.

Dimension	Executive CAB Standard
ICP Fit	Series B or later B2B SaaS; revenue segment where your product has strategic, not just operational, relevance. Avoid early-stage companies whose priorities shift too fast to provide durable advisory input, unless you offer a product for startups..
Title	C-level (CEO, CRO, CMO, CPO, CCO) or VP+ at companies with 500+ employees. The title signals authority and access. A VP at a 2,000-person company carries more strategic weight than a C-title at a 50-person startup. Title here is treated as a proxy for understanding the width and depth of organizational remit.
Tenure	Minimum 9 months in current role. Executives who just joined cannot meaningfully advise on your roadmap until they understand their own environment.
Relationship Health	NPS 8+ and a direct, active relationship with either your exec team or a senior CSM. Cold or transactional accounts will not bring candor to a high-trust forum.
Willingness to Challenge	Members should have deep expertise in their area and a proven track record of strategic leadership. This will inform how they challenge you and offer meaningful counterpoints. Source signals from CSM notes, QBR transcripts, or executive sponsor relationships.
Diversity	Industry vertical, company size, geography, primary use case. A room of identical companies tells you nothing about market breadth.

How to source candidates

CSM and AE relationship maps: Who do your senior reps have genuine executive relationships with?

QBR and EBR participants: Executives who already engage at a strategic level are pre-qualified.

NPS verbatims: Promoters who wrote thoughtful qualitative input are signaling advisory appetite.

Executive sponsor networks: Your CEO and CRO know which customer executives they trust. Start there.

The 6-Month Planning Calendar

This calendar runs from program brief through your second summit. The Done column is your tracking checklist. Phase 3 covers the 1.5-day summit format in detail in the next section.

Phase	Weeks	Focus	Key Tasks	Owner	Done?
PHASE 1 Foundation (~5 weeks)	Weeks 1-2	Define the program	• Write the one-page program brief: strategic purpose, 3-5 questions this CAB will inform • Confirm CEO or C-suite executive sponsor with genuine time commitment • Confirm participating members of your exec team, align on program brief, roles and time commitment. Choose the event date. • Set cadence: 2 in-person 1.5-day summits per year + async touchpoints • Define internal stakeholders who will participate (limit to 3-4 senior leaders) • Create externally facing materials • Establish meeting / communication cadence with internal stakeholders and RACI	CM Lead	☐
	Week 3	Build member criteria	• Define ICP fit criteria (company size, stage, industry) • Set title floor: C-level or VP+ at 500+ employee companies • Set health signal thresholds (NPS 8+, tenure 12+ months, exec relationship) • Determine diversity targets: vertical, size, geography, use case • Decide total member count: 10-14 max	CM Lead	☐
	Weeks 4-5	Recruit members	• Generate long list (30+ executive candidates) • Keep track of: why this person was chosen, what they will gain, exact time ask • Score against all criteria; select top 20 (you will need that many to get to 10-12 in the room) • Select desirable geographic location based on locations of people on your list • CEO or exec sponsor sends personal, tailored invitations (no templates) • Target 75%+ acceptance rate; below that, revise the message or the list • Confirm all members; hold dates on calendars immediately (at least 3 months out)	CEO + CM Lead	☐
PHASE 2 Pre-Meeting (~13 weeks)	Weeks 6-8	Executive onboarding calls	• Schedule 15-30 min 1:1 with every confirmed member (CM Lead or exec sponsor) • Ask: top strategic priorities, product and vendor frustrations, what they want from peers • Ask: what topics would make them rearrange their calendar	CM Lead + Exec Sponsor	☐

Phase	Weeks	Focus	Key Tasks	Owner	Done?
			• Document verbatim themes; surface 2-3 high-signal agenda topics		
	Weeks 9-13	Build agenda	• Draft agenda around member-sourced themes only • Apply 60/20/20 rule: 60% discussion, 20% company, 20% peer exchange • Identify internal or external facilitator • Confirm: no product demos, no sales content on the agenda • Get exec sponsor sign-off; brief all internal attendees	CM Lead + Facilitator	☐
	Weeks 9-11	White-glove logistics	• Book venue: private resort, boutique hotel, or dedicated executive facility • Arrange individual travel and accommodation coordination for all members • Produce executive welcome kit: personalized agenda, peer bios, program charter • Assign dedicated on-site coordinator for day-of logistics	CM Lead + Ops	☐
	Weeks 12-13	White-glove experiences	• Design Day 0 welcome reception: hosted dinner, curated seating, personal welcome notes • Plan Day 1 evening activity: experiential, non-generic (cooking class, private tour, etc.) • Book meeting facility (on-site or away from hotel). Don't forget catering, coffee and snacks! • Run a show-flow debrief internally • Communicate all logistics to customers, send detailed agendas / calendar events		
	Weeks 14-18	Develop content	• Based on agenda, develop specific sessions and discussions • Assign exec leaders to sessions they will lead • Develop materials and collateral (slides, discussion guides, printouts, etc) • Debrief with all internal attendees • Send pre-reads to customers, etc.		
PHASE 3 Meeting 1 (1.5 Days)	Week 19	Run the summit	• Day 0: Arrival coordination, welcome reception, hosted dinner • Day 1 AM: Opening session, member introductions, Topic 1 (strategic question) • Day 1 PM: Topic 2, working group or breakout, synthesis and commitments • Day 1 Evening: Hosted dinner and curated activity • Day 2 AM: Topic 3 or open floor, close with explicit next steps and feedback loop	Facilitator + CM	☐

Phase	Weeks	Focus	Key Tasks	Owner	Done?
			• Capture verbatim input throughout (facilitator notes + recording) • Brief exec sponsor on top insights same day as Day 2 close		
PHASE 4 Between Meetings (~17 weeks)	Weeks 22-23	Close the loop	• Send personalized written summary to each member within 10 business days • Name themes heard, decisions influenced, open questions still in motion • Route key inputs to product, sales, and go-to-market owners with attribution • Send individual thank-you from CEO or exec sponsor to each member	CM Lead + CEO	☐
	Weeks 24-27	Async touchpoint	• Identify one focused strategic question for async input • Send 3-question survey or schedule 45-min exec roundcall • Publish member-facing summary of responses • Monitor for role or company changes; update roster • Surface any members as candidates for deeper engagement (references, case studies)	CM Lead	☐
	Weeks 28-30	Start prep for 2nd meeting	• Send member pulse: preferred topics, summit feedback, any changes in priorities • Identify 1-2 natural member transitions (if any); recruit executive replacements • Begin venue search and hold dates for Meeting 2 • Confirm agenda themes from pulse survey	CM Lead	☐
	Weeks 30-38	Phase 2 planning	• Repeat all steps from meeting 1’s 2nd phase	CM Lead	☐
PHASE 5 Meeting 2 (1.5 Days if in-person or a couple of virtual sessions)	Weeks 39-40	Deepen the relationship	• Reference Meeting 1 commitments; demonstrate visible follow-through • Bring harder questions: earlier-stage roadmap, competitive positioning, market bets • Incorporate a peer-to-peer working session (members advising each other, not just you) • Close Day 2 by confirming next summit date in the room • Begin post-summit closed loop (repeat Phase 4 cycle)	Facilitator + CM	☐

The 1.5-Day Summit: Run-of-Show Templates

We have found success with the following format: Day 0 arrival and welcome reception, Day 1 full meeting day plus evening activity, Day 2 closing session and departure. Every element of this schedule is designed to build trust progressively. The welcome reception the night before is not optional hospitality. It is the relationship foundation that makes Day 1 candor possible.

DAY 0: Arrival and Welcome Reception

Members arrive on their own schedules. Your job on Day 0 is to signal: this is different. Assign a dedicated point of contact who handles every logistics question. Send a personalized welcome note / welcome gift to each member's room. The reception should feel like a dinner with peers, not a corporate welcome event.

Time	Activity	Format / Notes
2:00-4:00 PM	Staggered arrivals; individual room check-in	Dedicated logistics contact on-call
12:00 pm	Welcome note and executive gift in each room	Personalized; no branded tchotchkes
6:00 PM	Cocktail reception: informal, unstructured	No agenda; executive sponsor circulates
7:000 PM	Hosted welcome dinner or a memorable experience that emphasizes networking	Curated seating plan; mixed companies per table
9:00 PM	Close; optional informal continuation	No scheduled programming after dinner

Evening activity design principles

The evening activity (on either night) is where peer relationships form. Choose something that requires light collaboration and conversation, not passive consumption. Private cooking class, guided wine or whisky tasting, city tour with a local guide, or a competitive but low-stakes game all work. Avoid: formal entertainment where members are seated and watching, anything physically demanding without checking preferences, anything that feels like a team-building exercise.

DAY 1: Full Meeting Day and Evening Activity

Day 1 is the core of the summit. Apply the 60/20/20 rule: 60 percent facilitated member discussion, 20 percent company framing or context-setting, 20 percent peer-to-peer exchange. No product demos. No sales content. If a member asks a product question, take it offline.

Time	Activity	Format / Notes
7:30 AM	Breakfast: informal, optional early arrival	Unstructured; relationship building
8:30 AM	Welcome and program context (exec sponsor)	Max 10 minutes; set the tone
8:40 AM	Member introductions: role, company, one unfiltered observation about your market	Round table; 2-3 min per person
9:45 AM	Break	(15 min)
10:00 AM	Topic 1: [Strategic question sourced from onboarding calls]	Facilitated discussion (90 min)
11:30 AM	Lunch	Informal; no agenda
12:30 PM	Topic 2: [Strategic question: market dynamics, buyer behavior, or competitive positioning]	Facilitated discussion (90 min)
2:00 PM	Synthesis: what we heard, patterns across the room	Facilitator-led (15 min)
2:15 PM	Break	(15 min)
2:30 PM	Working session: small groups tackle a specific problem your company is facing	Breakouts (50 min) + debrief (40 min)
4:00 PM	Topic 3 or open floor: what are we not asking?	Open discussion (40 min)
4:45 PM	Commitments close: what you heard, what you will do, when they will hear back	Exec sponsor delivers (15 min)
5:00 PM	Break and transition	
6:00 PM	Evening activity + group dinner	Experiential; non-generic (see note below)
9:00 PM	Close, optional continuation	

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DAY 2: Closing Session and Departure

Day 2 is shorter and more focused. Members are departing; schedule sessions before noon. The goal is to close strong: reinforce what you committed to, surface any remaining input, and lock the next summit date before they leave the room.

Time	Activity	Format / Notes
7:30 AM	Breakfast	Informal; optional
8:30 AM	Day 2 open: energy check, any overnight reflections	Facilitator-led (10 min)
8:40 AM	Topic 4 or deep dive: one focused question on a decision you are actively making	Facilitated discussion (50 min)
9:30 AM	Peer exchange: what are members solving that others in the room face too?	Member-led (30 min)
10:00 AM	Break	
10:15 AM	Program close: full summary of commitments made across both days	Exec sponsor delivers (15 min)
10:30 AM	Confirm next summit date in the room	Non-negotiable; do not leave without a date
10:40 AM	Thank you and close	Personal; exec sponsor addresses each member by name
11:00 AM+	Staggered departures; individual logistics support	Dedicated contact on-call through last departure

Executive Onboarding Interview Guide

Run a 20-30-minute 1:1 with every confirmed member before the first summit. These calls are not intake forms. They are the first act of the advisory relationship and the primary source for your agenda. An executive who feels heard before the first meeting shows up differently than one who received a calendar invite.

Opening framing (2 min)

"We are building this program around what actually matters to you and your peers. Before our first meeting, I want to understand what is on your mind strategically and what would make this genuinely useful. There are no wrong answers."

Core questions (25 min)

1. What is the biggest strategic challenge your organization is facing in the next 12 months?
2. Where does our product or company fall short of what you actually need?
3. What are you watching in your market that we should understand better?
4. What topics would make it worth a day and a half of your time to discuss with peers at your level?
5. What does a useful advisory relationship with a vendor actually look like to you?
6. Is there anyone else at your company who should have visibility into this program?

Close (3 min)

Confirm logistics. Tell them exactly what you will do with this input. If they mentioned a specific frustration or topic, name it back and tell them it will be on the agenda.

5 Mistakes That Kill Credibility with a C-Level Room

1. Letting logistics fall short of the member tier

Executives notice every friction point: the disorganized check-in, the generic venue, an undifferentiated dinner that they could get in any city, the agenda that arrived the morning of. Each one signals that the program was not built for their level. White-glove logistics are not a luxury in an executive CAB. They are the cost of admission.

2. Bringing too many internal people

More than three or four internal attendees changes the power dynamic. Executives become cautious when they are outnumbered by your team. Keep your internal presence tight: a few key executive team members (ask: does this person really need to be here?), a facilitator and / or note-taker. Everyone else listens to / reads the summary. Rule of thumb: strive for 2x as many customers in the room as you have internal people.

3. Turning sessions into roadmap demos

High level product strategy conversations belong in the Executive CAB. Product roadmap reviews belong in QBRs. The executive CAB agenda should contain the questions you genuinely do not know the answers to. If you already know what you are going to build, do not ask the CAB to validate it.

4. Treating the close loop as optional

A personalized, CEO-signed follow-up within 10 business days of the summit is not a nice-to-have. It is the signal that separates an executive CAB from every other advisory program these executives have participated in. Generic recap emails signal that the CAB was transactional. Personal acknowledgment of specific input is remembered.

5. Recruiting the wrong people

The worst mistake you can make is inviting customers without a strategic fit. Because you are recruiting not for a single event – but rather an ongoing commitment and a community – inviting a person who doesn't belong will have a compounding impact. Recruiting people with varying degrees of title authority will devalue the conversation, quality of insights and networking. Additionally, a room full of promoters will give you positive reinforcement and limited intelligence. Deliberately recruit executives with a history of direct feedback. The most valuable CAB members are often the ones who told your CSM something was broken. That candor, in a trusted room, is exactly what you are trying to generate.

A Note on What an Executive CAB Actually Delivers

The ROI case for an executive CAB is not built on the hours of input gathered. It is built on what changes because of that input: the roadmap bets you made with better information, the messaging that resonated because real buyers shaped it, the deals that closed because a CAB member took a call.

Those outcomes take time. The first summit plants the relationship. The second summit deepens it. The third is where you start to see the compounding return. Plan accordingly.

Build the relationship before you need anything from it.

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