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# The CAB (Customer Advisory Board) Launch Planning Guide

How to Plan and Run Your First Two Customer Advisory Board Meetings in B2B SaaS

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## What this guide covers

- A week-by-week planning calendar: kickoff through your second meeting
- Member recruitment criteria and a scoring framework
- Agenda templates for Meeting 1 and Meeting 2
- Onboarding interview questions to run before the first meeting
- The 5 mistakes that kill CABs before they find their rhythm

## What a CAB Actually Is

A Customer Advisory Board is a structured, ongoing forum where a curated group of senior (non-executive) customers co-create strategy with your company. Unlike a reference program or an advocacy community, a CAB is invitation-only, executive-facing, and built on reciprocal value.

Members give you honest input on roadmap, positioning, and strategy. In return, they get early access, peer community, and genuine influence over the product they use.

The word "advisory" is the point. These are not customers you are impressing. They are customers you are consulting. That distinction shapes every design decision in this guide.

## CAB vs. other customer programs

**Reference program:** Customers vouch for you. Limited in scope

**Advocacy program:** Customers amplify you. Broad, scalable.

**Customer Advisory Board:** Customers co-create with you. Strategic, high-touch.

# Member Recruitment Criteria

The right CAB has 10 to 15 members. Define your criteria across five dimensions before you name a single candidate.

Dimension	Criteria
Company Profile	ICP fit, company size, industry, growth stage (Series B or later preferred)
Champion Profile	Director / VP title, direct stake in outcomes under discussion, familiar with the product, but also has a strategic outlook on the value the product delivers.
Health Signals	NPS promoter or passive (8+), tenure of 12+ months, active product engagement
Diversity	Mix of industries, company stages, geographies, and primary use cases
Candor Potential	At least 20-30% of members should be willing to challenge, not just validate

Do not build your CAB from your cheerleaders alone. A room full of fans gives you a focus group. A room with honest critics gives you intelligence. Aim for at least 20-30 percent of members who will challenge and push back.

# The 6-Month Planning Calendar

This calendar covers launch through your second meeting. Use the Done column to track progress. The Phase column groups weeks into the five stages of a successful CAB launch.

Phase	Weeks	Focus	Key Tasks	Owner	Done?
PHASE 1 Foundation	Week 1	Define the program	<ul style="list-style-type: none"> <li>Write the one-page program brief</li> <li>Confirm executive sponsor and key stakeholders, align on roles and time commitment</li> <li>Select date(s)</li> <li>Set cadence: 2 in-person meetings/year + async touchpoints</li> <li>Define the 3-5 strategic questions this CAB will inform</li> </ul>	CM Lead	<input type="checkbox"/>
	Week 2	Build member criteria	<ul style="list-style-type: none"> <li>Define company profile criteria</li> <li>Define champion profile criteria (title, stake, authority)</li> <li>Set health signal thresholds (NPS, tenure, engagement)</li> <li>Determine diversity targets across industry, stage, geography</li> </ul>	CM Lead	<input type="checkbox"/>
	Weeks 3-4	Recruit members	<ul style="list-style-type: none"> <li>Generate long list (25+ candidates)</li> <li>Score against criteria; select top 15</li> <li>Executive sponsor sends personal invitations</li> <li>Target 70%+ acceptance rate</li> <li>Confirm all members; send calendar holds (you want to send a calendar hold at least 3 months out for an in-person meeting)</li> </ul>	Exec Sponsor + CM	<input type="checkbox"/>
PHASE 2 Pre-Meeting Planning	Weeks 5-6	Onboarding interviews	<ul style="list-style-type: none"> <li>Schedule 30-min 1:1 with every confirmed member</li> <li>Ask: top strategic priorities, product pain points, program hopes</li> <li>Document verbatim themes across all calls</li> <li>Identify 2-3 topics with strong cross-member signal</li> </ul>	CM Lead	<input type="checkbox"/>
	Weeks 7-16	Build agenda and create the materials	<ul style="list-style-type: none"> <li>Draft agenda around member-sourced themes</li> <li>Confirm: 60%+ discussion time, max 20 min company presentation</li> <li>Identify and brief session facilitator</li> <li>Get exec sponsor sign-off on agenda</li> </ul>	CM Lead + Facilitator	<input type="checkbox"/>
	Weeks 7-16	Logistics + prep	<ul style="list-style-type: none"> <li>Book in-person venue (private, signal investment)</li> </ul>	CM Lead + Ops	<input type="checkbox"/>

Phase	Weeks	Focus	Key Tasks	Owner	Done?
			<ul style="list-style-type: none"> <li>Book dinner the evening before if possible</li> <li>Produce member welcome packet: bios, agenda, context</li> <li>Brief all internal attendees on facilitation norms</li> <li>Prepare verbatim capture system (notes, recording)</li> <li>Communicate travel logistics to each member</li> </ul>		
<b>PHASE 3 Meeting 1</b>	Week 17	Run the first meeting	<ul style="list-style-type: none"> <li>Open with member connection time (meal or social)</li> <li>Facilitate structured discussion on 2-3 strategic topics</li> <li>Capture verbatim input (not summarized themes)</li> <li>Close with explicit next steps and feedback loop commitment</li> <li>Brief executive sponsor on top 5 insights same day</li> </ul>	Facilitator + CM	<input type="checkbox"/>
<b>PHASE 4 Between Meetings</b>	Weeks 18-19	Close the loop	<ul style="list-style-type: none"> <li>Send written summary to all members (within 2 weeks)</li> <li>Name themes heard, decisions influenced, open questions</li> <li>Route key inputs to product, sales, marketing owners</li> <li>Log member-specific notes in CRM</li> </ul>	CM Lead	<input type="checkbox"/>
	Weeks 20-22	Async touchpoint	<ul style="list-style-type: none"> <li>Identify one focused strategic question for async input</li> <li>Send 3-question survey or schedule 45-min group call</li> <li>Publish summary of responses to all members</li> <li>Flag any role/company changes; update member roster</li> </ul>	CM Lead	<input type="checkbox"/>
	Weeks 19-21	Pre-Meeting 2 prep	<ul style="list-style-type: none"> <li>Send member pulse survey (topics, feedback on M1, changes)</li> <li>Identify 1-2 natural member transitions; recruit replacements</li> <li>Confirm dates and venue for Meeting 2, place calendar holds</li> <li>Begin agenda development using pulse survey results</li> </ul>	CM Lead	<input type="checkbox"/>
	Weeks 22-33	Build agenda and create the materials	<ul style="list-style-type: none"> <li>Draft agenda around member-sourced themes</li> <li>Confirm: 60%+ discussion time, max 20 min company presentation</li> <li>Identify and brief session facilitator</li> </ul>	CM Lead + Facilitator	<input type="checkbox"/>

Phase	Weeks	Focus	Key Tasks	Owner	Done?
			<ul style="list-style-type: none"> <li>Get exec sponsor sign-off on agenda</li> </ul>		
	Weeks 22-33	Logistics + prep	<ul style="list-style-type: none"> <li>Repeat steps from the first meeting</li> </ul>	CM Lead + Ops	<input type="checkbox"/>
<b>PHASE 5 Meeting 2</b>	Week 34	Run Meeting 2 + reset rhythm	<ul style="list-style-type: none"> <li>Go deeper: harder questions, earlier-stage decisions</li> <li>Reference Meeting 1 commitments; show progress</li> <li>Confirm next meeting date in the room before close</li> <li>Debrief internally within 48 hours</li> <li>Begin post-meeting close loop (repeat Phase 4 cycle)</li> </ul>	Facilitator + CM	<input type="checkbox"/>

# Meeting Agenda Templates

## Meeting 1 Agenda Template (Half-Day Format)

The first meeting has one job: make members feel that their time was worth it and that their candor is safe. Target 60 percent discussion time. No more than 20 minutes of company presentation. Ideally, this would happen in person, and you would add on to an event most of your members will be attending: your user conference, industry conferences, etc. You want to make it easy and compelling to say yes, especially when travel budgets are tight.

Time	Agenda Item	Format
11:30 AM	Arrival, lunch, and informal introductions	Unstructured
12:30 PM	Welcome and program overview (exec sponsor)	Presentation (10 min)
12:40 PM	Member introductions: role, company, one thing you want us to fix	Round table (20 min)
1:00 PM	Topic 1: [Strategic question from onboarding interviews]	Facilitated discussion (45 min)
1:45 PM	Break	
2:00 PM	Topic 2: [Strategic question from onboarding interviews]	Facilitated discussion (45 min)
2:45 PM	What we heard: summarize top themes aloud	Synthesis (10 min)
2:55 PM	Commitments: what we will do, when you will hear back	Close (10 min)
3:05 PM	Close and next steps	Wrap
5:00 PM onward	Transition to opening party of your larger customer event	Networking

## Meeting 2 Agenda Template (Half-Day Format)

The second meeting can go deeper. Members have seen you close the loop. The trust foundation is set. Bring harder questions and earlier-stage material. Similar to the first meeting, the preferred format is in-person and to attach it to an event most of your customers will be attending. If budget is an issue, you can swap this in-person meeting for a series of virtual meetings (never longer than 1.5 hours).

Time	Agenda Item	Format
11:30 AM	Arrival, lunch, and reconnection	Unstructured
12:30 PM	Since we last met: what we did with your input	Update (15 min)
12:45 PM	Topic 1: [Earlier-stage question: roadmap, positioning, or strategy]	Facilitated discussion (45 min)
1:30 PM	Break	
1:45 PM	Topic 2: [Competitive or market question members raised in pulse survey]	Facilitated discussion (40 min)
2:25 PM	Open floor: what are we missing?	Open discussion (15 min)

Time	Agenda Item	Format
2:40 PM	What we heard and what happens next	Synthesis (10 min)
2:50 PM	Confirm next meeting date in the room	Close (10 min)
3:00 PM	Close	Wrap
5:00 PM onward	Transition to opening party of your larger customer event	Networking

## Member Onboarding Interview Guide

Run a 30-minute 1:1 with every confirmed member before the first meeting. These calls are the first act of the advisory relationship. They surface the raw material for an agenda members actually care about.

### Opening (5 min)

"Thank you for joining the CAB. Before our first meeting, I want to understand what you are dealing with in your role and what would make this program genuinely useful for you."

### Core questions (20 min)

1. What is the biggest challenge your team is facing in the next 6 months?
2. Where does our product help you most? Where does it fall short?
3. If you could change one thing about how we work with you as a company, what would it be?
4. What topics would make you clear your calendar for an afternoon with peers?
5. What would make this advisory board worth your time a year from now?

### Close (5 min)

Confirm logistics for the first meeting. Tell them what you will do with this input. Ask if there is anyone else at their company who should have visibility into the CAB.

## 5 Mistakes That Kill CABs in the First Six Months

### 1. Recruiting too fast

Filling seats quickly without an eye towards the right members creates the wrong room. The member mix is the program. Take the extra two weeks to get it right. A CAB with the wrong members is harder to fix than a CAB that launched two weeks late.

### 2. Leading with product news

Your roadmap is not the agenda. Members agreed to advise you, not to sit through a product briefing. If more than 20 percent of your agenda is company presentation, redesign the meeting.

### 3. Skipping the in-person first meeting

Virtual-first CABs have lower candor, lower retention, and lower program longevity. The investment in a physical gathering pays back over years. This is the one design constraint worth holding firm on.

### 4. Going quiet after meeting one

Members disengage in the silence. Close the loop within two weeks of every meeting, every time. Members who see their input reflected in writing become advocates for the program internally.

### 5. Treating the CAB as a marketing asset

The moment members feel like they are in a room to be quoted, the candor stops. Build the relationship first. The proof assets (case studies, references, quotes) follow naturally once trust is established.

## A Note on CAB Philosophy

A CAB run with discipline is one of the highest-ROI programs in customer marketing. Not because it generates references or case studies (though it does, eventually), but because it puts your most strategic customers in a co-creator relationship with your company.

That relationship changes how you build, how you position, and how you retain. The calendar above is not a shortcut. It is the minimum viable discipline required to make it work.

**Plan the relationship, not just the meeting.**

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### **Rally Customer Marketing**

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