

**YOUR
CUSTOMER
ADVISORY PANEL
RESOURCE MANUAL**



*A reference guide to help you make the most of
the*

**CUSTOMER ADVISORY PANEL
PROCESS**

**An initiative of
STREETWISE INNOVATION**

Welcome

Asking for your customer's feedback about your business and the products and services, and the level of customer service you provide is probably one of the most difficult tasks you will ever have to carry out.

It is also one of the most valuable investments you could make in your business because you will make positive changes in your company's performance as a direct result of your efforts.

You know your customers better than we do.

You also know that the way in which they perceive your business is, more often than not, the reality.

Our objective for this Customer Advisory Panel process is to make certain that everyone who gets involved enjoys the experience and benefits from it once you implement the suggestions and can see the changes that occur in your business. Ultimately, your customers will get back much more than they give.

It is also a great rapport building strategy between your business and your customers.

Please go through this Resource Manual in detail so that we can give your company the benefit of our expertise and confidence in making the Customer Advisory Panel session "come alive" for you and your team.

Thank you and enjoy the experience.

ROSS A. GRAHAM
Chief Dispenser of Enthusiasm
Streetwise Innovation

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Why should we have a Customer Advisory Panel?

It is amazing the number of businesses who sit down before they launch a new product or service and try to estimate what their customer's response will be to it. Or, they are about to develop their strategy for the coming financial/calendar year and review their company's performance for the current year. Or, they might be implementing a customer service awareness program for their team.

Instead of asking their customer's advice, they bumble along, hoping for the best, never really understanding why their customers react the way they do.

Often it is because they are so close to the "coal face" that they just can't step back and take an objective look at their business. Instead, they continue to try and guess what the customers want.

Does this sound frighteningly familiar?

In many businesses, this is exactly how they operate, never addressing why they are doing it the way they do.

That is why Customer Advisory Panels are so powerful. They are not some research-based, report-generating, expensive exercise. They provide an invaluable insight into your customers and what makes them tick.

Asking customers for this information builds loyalty and commitment from the Panel members. You now have a team of dedicated customers dealing with you regularly; keeping an eye on your business and helping you keep an eye on your competitors.

And why is that? Simply because you have taken the time to ask them exactly what they would like you to do to help them.

Customer Advisory Panels are an exciting concept and when it comes to creating service excellence, they are a necessity!

Checklist of requirements

- Name tags
- Table settings
- Water and mints
- Pens and paper
- Audio recording equipment (optional)
- Blank CD's
- Note taker
- Flip chart
- Flip chart marker pens
- Purpose statement
- Questions
- A meaningful gift/complimentary service
- Smile
- An open mind – every problem is an opportunity to take your business to new heights.

How many, and what type of customers should be there?

The number of customers who attend these sessions should be no less than eight, and no more than twelve. It is really important that you keep the numbers small enough to ensure that the group is manageable. It is also important that each person has the chance to participate.

If you find yourself in the situation where more than twelve people respond to your invitation, it's worth splitting the group into two smaller ones to ensure you get the most from your customer's advice without losing the group dynamics.

Particularly for your first Customer Advisory Panel, it is not a good idea to invite customers who are unhappy with your business. When these people come to the session, their negativity can often affect the group very quickly.

In this scenario, you will find yourself in one of two situations:

- the negativity will spread across the group, or
- the rest of the group will jump to your defence and the session will turn into a "free for all".

To avoid either situation, the solution is to invite a cross-section of customers who are, to your knowledge, relatively happy. Some may have been customers for years, some might be new customers and some may be large customers, others small. Make sure you try to cover the major target groups you cater to and deal with.

For example, if you want to gain feedback from a certain segment of your customer base, then invite these people specifically.

What is the preferred venue?

You need to choose a venue where your customers will feel comfortable. It is best that you choose a neutral location so that your customers don't feel as though they have been summoned to your office. Ideally, look at holding your Customer Advisory Panel in a hotel or function centre that is close to your business.

Whilst recording is optional, it is highly recommended, so the venue (or, we will provide it at cost) should provide good quality and very effective audio equipment so that you can record the session, have it transcribed and refer to it later.

Although it will be tempting to opt for a simple CD recorder, you will find yourself in an absolute nightmare when it comes to having the CD's transcribed.

Obviously the recording of your Customer Advisory Panel is extremely important because the information that comes out of the session will be truly valuable. It is also essential to make clear, precise notes during the session as well.

These methods of recording the session should be clearly explained to the customers during the introduction to ensure there are no objections.

You will need a flipchart (which we provide), so that you can open up points for discussion and make sure the entire group becomes involved. However, as the facilitators, this is something that we take care of for you.

The room set-up has to be open and one where people can communicate easily. A “U-shape” table arrangement works well, with the facilitator sitting or standing at the head end.

There should be jugs of water and glasses on the table with bowls of mints. Remember, it’s a nurturing exercise.

Your customers should be issued with name tags. These will need to be printed in a large font so that you, and other customers can see the names clearly. Either on the name tags, or on a list provided to each participant, it is a good idea to have the customer’s name and, if a business customer, their business name. You will find that the other customers will be pleased to know what their fellow Panel members do.

How long should the session run?

The session should run for approximately 2 hours, however, that will depend on:

- the overall objective you have set for the Customer Advisory Panel
- how much feedback you need, and
- how the group is feeling.

Remember to respect people’s time as it is a valuable asset. Start on time and finish on time.

There should be breaks after one hour and coffee and tea should be accessible throughout.

The two reasons why you are having a Customer Advisory Panel is to let your customers know you really care and to put yourself in touch with your marketplace and gain meaningful information.

How do we invite customers to attend?

You need to express the benefits to your customer – the “what’s in it for me?” question will need to be answered. Without this, your customers who are busy may not want to give up their time.

They also need to be reassured that it is going to be valuable and their time is well spent and appreciated. For that to happen, they have to believe that you are really going to **listen** to their feedback and **do something about it!**

You need to let them know that you really need and want their help and that in return, you will make a commitment to implement and test their suggestions ... so that you can make it easier and more beneficial for them to do business with you.

Obviously, one of the best ways to invite your customers is to write to them and explain exactly why you are conducting a Customer Advisory Panel. You will find a sample of a letter on page 10 of this manual.

What time of day should we conduct the session?

This can vary depending on the industries or professions you deal with. Afternoon to early evening, for example, 4pm to 6pm, or 5.30pm to 7.30pm seem to work well. If it is the latter, we recommend budgeting for some hot and cold finger foods and orange juice or soft drinks.

That way, you are not taking your customer out of their business or occupation all day or all afternoon. Alternatively, have a working breakfast from 7am when they are fresh and alert, then conduct the session until 9am, being mindful that some may be anxious about getting to their place of work/business.

What should we say and do, and what is our role at the session?

Once you have thanked your customers for dedicating their time and you have introduced the facilitator, the best thing for you to do is leave!

Now, that will be very hard. But if you want the best results, it's important that the facilitator be seen as a neutral party by your customers. Without you in the room, you will find your customers will be much more open and more ready to offer their opinion without feeling intimidated.

By removing yourself from the session, you will save yourself the trauma of taking simple comments about your business as personal attacks, even though they never really are.

Remember that if the entire session is being audio taped, you won't miss anything that is said.

To assist you in your role of introducing the facilitator, we've designed a sample script, presented on page 11, that you can use to get an idea of the type of information you need to cover in the introduction. You should amend it as you see fit so that you are totally comfortable using it – they need to be your words.

Above all else, it is important that you are relaxed and natural and very sincere in what you say to your customers.

Should someone from our team be in the room during the session?

This will depend on the kind of information you are looking for from your customers.

If you feel that it is important to have a team member available to answer any technical or professional questions, then by all means, nominate a team member to act as the "content resource".

The team member's role is to answer any questions that may arise related directly to your business. They cannot offer any real advice to the customers who have attended and they cannot put forward any new ideas for discussion. It's just comforting to know that any curly questions can be handled quickly and the session can move along as intended.

Sample invitation letter

Date

Name

Address

Dear (customer's name),

Communicating, in the truest sense of the word, with our customers ...

is very important to us. How do we do this, when your time is at a premium? One solution is to invite you to a special event. This event will give us a better insight and understanding of your needs. The outcome is ultimately to provide you with an improved, more efficient service.

Over the past few months, you may have noticed that we have made some changes in the way we do things. In the next few months, we plan to make additional changes to improve the way we do things. This is an aspect of our Core Values – to constantly improve our services to benefit our customers and the operation of our company. Before we do that, we would like, and will really appreciate your input.

(Customer's name), this letter is to invite you to join our Customer Advisory Panel. This session will give you the chance to provide us with your honest, 'get things off your chest' feedback.

Here are the details of this special and unique event:

VENUE:

DATE:

TIME:

This invitation is only being extended to a small, select group of our customers. To confirm your acceptance, (team member's name) from our office will call you in the next few days. This will allow us to organise for light refreshments to be served.

There are three things that we believe are important for you to know. First, your contribution to the Customer Advisory Panel will be valued and greatly appreciated. Second, we have invited an independent facilitator to conduct the session so that it will remain impartial and objective. Finally, we want you to be assured that we have a very real commitment to improving our services to you, our customers.

Yours sincerely,

Sample introduction to start the session and introduce the facilitator

“Welcome everyone. I would like to thank you all for investing your time and for making yourself available to provide us with valuable feedback and advice as to how we can constantly improve the products and services we provide to our customers.

Let me explain the format for this session.

The reason for this session is to find out exactly what you like, and what you don't like about our company. We are here to make sure you get the very best products/services you can from our industry/profession.

The purpose of this session is to ensure that we do it properly, therefore, we have asked Ross Graham from Streetwise Innovation to facilitate the session and help gather your thoughts and suggestions. Ross's role in the process is to ensure that the session runs smoothly by directing the flow of the discussion and asking pertinent questions. It is important to mention that Ross has no connection to the business, he is here simply as a neutral party.

Apart from (name of team member), who will be available at the back of the room in case there are any technical questions that need clarification, there is no one else from our company in the room. And there is a reason for that. We felt that you may feel inhibited if we are present, so by leaving, you can feel free to say whatever is on your mind without feeling obliged to justify yourself.

Because we are determined to listen to our customers, the whole session will be taped so that it can be transcribed and we can then work through your suggestions and make sure they are understood by the entire team at (name of your company).

You will understand that there may be some ideas that, for some reason beyond our control, cannot be put into practice straight away. However, we will be in touch with you in the next few weeks to advise you how we will act upon your ideas and feedback.

So thank you once again, I will see you at the conclusion of the session.”

Sample “thank you” letter to be sent after the session

Dear (customer’s name),

Thank you for giving up your time to be a part of our Customer Advisory Panel. You have certainly provided us with plenty of material to consider.

Over the next week or so, I will receive the transcript of the session and can start to review the many detailed points that were discussed. So if you don’t hear from me until around (date), please don’t think: “Oh well, as usual, they’ll do nothing.”

We are committed to what we have started. And we have to keep it moving forward because within the next two months our entire team will be meeting and they are expecting us to give them a ‘road map’ showing the direction in which our customers have told us they want the relationship to go.

We are not complacent. We realise we still have a lot to do, and that it is essential we now focus on what you, our customers, want our company to deliver and the Customer Advisory Panel session was a further, positive step in that process.

If there is anything more you think of that you would like to talk about prior to us getting back to you, please do not hesitate to pick up the phone and I will be only too happy to listen to your ideas.

Once again, thank you for your help in moving our company along the road, and through the process of truly delighting our customers – that is our goal.

Yours sincerely,

The role of Streetwise Innovation

Our role is to assist you through the whole Customer Advisory Panel process. In essence, we become your process consultants, or the facilitators of both the session itself and the complete process – from A to Z.

We provide assistance and advice in the following areas:

- establishing the purpose for conducting a Customer Advisory Panel session
- designing a “purpose statement”
- targeting the customers to invite
- drafting the letter of invitation
- choosing, and if appropriate, arranging a suitable venue and catering, if required
- arranging for, and providing the necessary equipment and other requirements as per our checklist on page 5
- drafting the script for your introduction
- drafting the “thank you” letter to be sent after the session
- transcribing the recordings¹³
- debriefing you and any of your team as to the outcomes of the session
- developing a strategy to implement the necessary changes
- provide a follow-up monitoring of the results.

We will meet with you to obtain a brief from you as to the specific areas, if any, of the business that you would like feedback on and flesh out the type of service that has been offered to your customers in the past.

Based on that meeting, we will tailor our line of questioning and the direction in which we lead the discussion to ensure you get the maximum from the session.

During the facilitation of the session, we will:

- watch the flow of conversation
- observe the roles people are adopting
- process relevant information including the attitudes of people towards the content and one another
- ensure the communication is following a structure
- lead and control the pace of the interaction
- be alert to levels of energy, attention and the like
- managing the functioning of the group and the group dynamics
- observing, and maintaining time limits
- ensure that all participants have fun and enjoy the experience.

The investment

As we said in the welcome message, conducting a Customer Advisory Panel is one of the most valuable investments you can make in your business – after all, without customers, none of us have a business!

Apart from the mailing of letters on your company letterhead, we can oversee all the other logistical elements of the process. However, if you have the facilities, resources and the time to arrange the logistics and would prefer to take control of those arrangements, that is fine with us.

We will be happy to provide advice regarding the quality of the choices made.

Otherwise, we will include those costs – such as venue, equipment, catering and transcribing of tapes in our proposal. All quotes would be approved by you prior to any expenditure being made.

The investment for Streetwise Innovation to guide you through the process and to facilitate the session is \$2,200.00 inclusive of G.S.T. The only up-front payment required is 50% of that fee, with the balance due upon completion. Invoices from suppliers of the venue, equipment, catering, etc., will be passed on to you for processing.

We look forward with great anticipation to providing this service which will increase the performance of your business beyond your expectations.

For further information regarding the Customer Advisory Panel process or any of the other services offered by Streetwise Innovation, please contact:

Ross Graham on mobile: +61 0423 533 578
or via **email: ross@streetwiseinnovation.com**

You may also like to checkout our website:
www.streetwiseinnovation.com to see the other programs and services we offer.

Thank you.

Your Notes: