Client and Employee Advisory Board Tools

Workshop Tool

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Client Advisory Board Invitation Sample Letter

[Firm Letterhead]

[Date]

Dear Client,

Following my personal invitation over the phone today, here is a formal invitation to participate in the [Firm Name] Client Advisory Board.

We’re hosting a Client Advisory Board to:

- Gain feedback from you about your experience with our service
- Learn more about your unmet needs
- Innovate together by sharing with you some of our ideas for our future path as a firm, asking for your suggestions as we prioritize our “next steps,” and request your ongoing input as we implement new solutions and service offerings going forward.

We selected you from among many of our clients because:

- Your views are important to us
- You have a unique forward-thinking perspective that we value
- You’ve shown commitment to a long term relationship with our firm and this is one way for us to thank you for our continued partnership.

In return for your participation, we’ll:

- Facilitate learning with other members of the Client Advisory Board
- Provide a forum and sounding board to share your ideas and help achieve your business goals
- Commit to letting you control the agenda and focus of Client Advisory Board meetings.

Your commitment:

- We require members to attend 3 out of 4 professionally facilitated working sessions annually (your travel expenses will be reimbursed) and one online meeting or conference call quarterly
- There is a waiting list of individuals for seats on the board, and if for some reason you can’t meet these minimum requirements, we will need to substitute your place
- Board membership is renewed on an annual basis and the typical term is 2 years.

We welcome you to join us at the first dinner on [DATE], when you’ll have the opportunity to meet other participants and get a sense of working with the group.

Please let us know your decision, or if you have any questions?
Client Advisory Board Sample Meeting Agenda

Client Advisory Board Meeting Agenda

6:00pm - Introductions

Assuming not all Advisory Board Members have had the chance to meet everyone, introduce yourself, the Chair and the Board members, mentioning why each person has been invited, their background with your firm, etc.

6:10 pm – CAB Mission & Purpose

State how the Client Advisory Board meeting operates, how members can contribute and what both parties receive from the experience.

6:20pm – Feedback from last CAB meeting

Close the loop by reviewing previous topics raised and updating CAB members on progress from the last meeting.

6:30pm - Topic Presentation (possibly by a Guest Speaker – an industry expert, senior firm employee or a current customer)

They should provide the history behind the topic, how it impacts the marketplace and CAB members, any available solutions and what decisions need to be made moving forward.

7:00pm – Discussion of Topic

Use brainstorming techniques to collect ideas, ensuring each CAB member’s voice is heard and their comments captured in the meeting notes.

7:30pm – Refreshment and Convenience Break

7:40pm – Potential Strategies/Solutions

Establish a set of strategic directions from the ideas and suggestions gathered from the CAB members and achieve a group consensus (if that is the goal).

8:15pm - Summary

Acknowledge what the Client Advisory Board has achieved as a result of the meeting and what actions will be taken with the strategies and solutions gathered.

8:30pm – Adjournment

Next meeting date: ....
Employee Advisory Board Application Sample

[FIRM LOGO]

[FIRM NAME] Employee Advisory Board Application

Date: 
First Name: Last Name: 
Title/Position: 
Manager/Supervisor: 
Date started with the firm: 
Title/Position When Hired: 

1. How did you hear about the [FIRM NAME] Employee Advisory Board? 

2. What 3 things do you feel we do well as a firm? 
   a. For our Clients 
      i. 
      ii. 
      iii. 
   b. For our Employees 
      i. 
      ii. 
      iii. 

3. Discuss 3 areas you feel we could improve: 
   a. For our Clients 
      i. 
      ii. 
      iii. 
   b. For our Employees 
      i. 
      ii. 
      iii. 

4. Please tell us, with at least 3 examples, what would make you an excellent choice for the [FIRM NAME] Employee Advisory Board?

5. List the top 3 things you are hoping to see this firm implement in the coming year
   a. For our Clients
      i. ________________
      ii. ________________
      iii. ________________
   b. For our Employees
      i. ________________
      ii. ________________
      iii. ________________

6. What are your professional goals in the next 5 years?