

Client Advisory Board FAQs

Q: Why am I receiving this notice?

A: You have been chosen for an exclusive seat on CSG Forte's Annual Partner Customer Advisory Board.

Q: What is a Customer Advisory Board (CAB)?

A: A CAB is a select group of customers or partners who meet periodically to provide feedback and strategic insights on Forte's products and services. CAB members will get the opportunity to participate in strategic discussion sessions with other CSG Forte partners who may be in similar industries or verticals.

The feedback and insights provided from our CAB members will help us to drive business decisions moving forward.

Q: If I accept this invitation, what is in it for me?

A: There are many benefits to joining Forte's CAB such as:

- Be part of a select board that represents Voice of Customers
- Network, share and learn from industry peers
- Be influential in the development of Forte's products and solutions
- Insight into Forte's strategic roadmap
- Early access to feature demonstrations
- Recommend new ideas for product enhancements
- Beta test and provide user feedback to new products and features

Q: What is the membership term for this commitment?

A: The term of the CAB membership is 1 year. CAB meetings will be held quarterly.

Q: What am I committing to during this membership?

A: By accepting membership, you are committing to actively participate in a minimum of 2 CAB meetings in the quarter of your choice. There is no membership fee to become a CAB member.

Q: What do you mean by participate?

A: Our member's participation is key to improving our customer's experience. You will be encouraged to engage in discussion topics with other participants and to provide open and honest feedback related to the topic. You may also be asked to take surveys.

Q: Can I delegate this to my team member if I cannot attend?

A: We would prefer you to attend the sessions and not delegate to others. You can always attend the next session.

Q: Can I bring additional team members to the meeting?

A: If you have a team member who will add value to the feedback session, we would love for them as well to join us in our CAB meetings. The additional member cannot be a substitute for your presence. Please let us know so we can ensure the necessary steps are taken care of.

Q: Do I need to prepare anything before the meeting?

A: You may be asked to take surveys or provide insights ahead of our meetings. However, as we get closer to the meeting, we will provide and communicate any action items.

Q: What dates will the CAB be held?

A: We understand that you will need to plan ahead to schedule time for CAB attendance. We will provide CAB dates to members in December 2021 for the 2022- 2023 membership term.

Q: How long is each CAB meeting?

A: The quarterly meeting duration will be no longer than 2 hours. We will send out an agenda with details before each meeting.

Q: What is the location of the CAB meeting?

A: Forte will host virtual meetings via Microsoft Teams. We want to ensure our CAB members and Forte employees are able to interact in a safe environment. Post pandemic, we may transition to a hybrid model that includes an annual in-person meeting.

Q: What if I want to attend more than 2 CAB meetings?

A: As long as the minimum commitment of 2 meetings is met, and there is room, you are encouraged to participate in as many meetings as you would like. We will cap our sessions to a small number of participants to ensure there is enough time to hear everyone's feedback.