

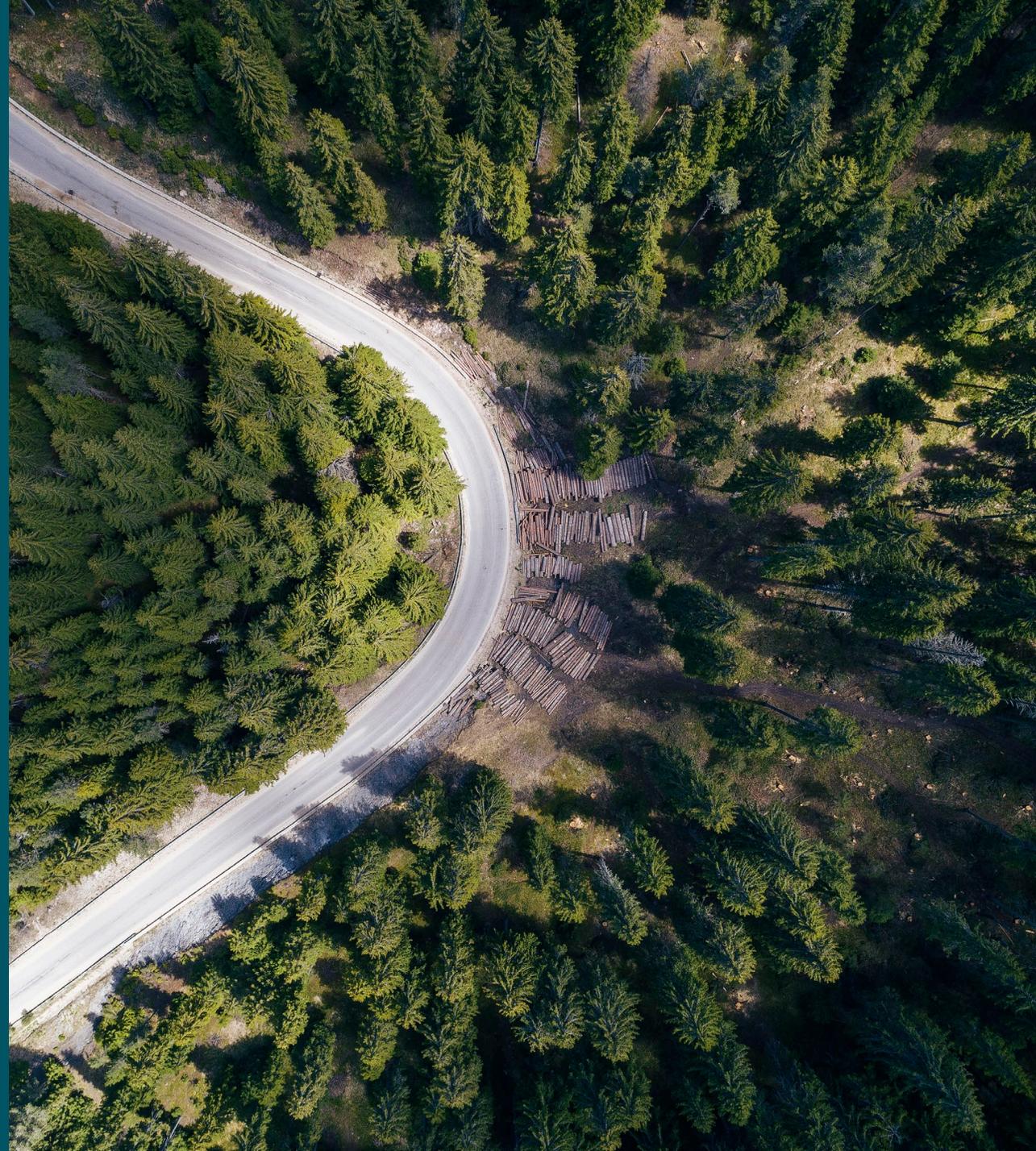
Connecting with Customers: The Importance of Customer Advisory Boards and Building Strong Relationships

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citrix



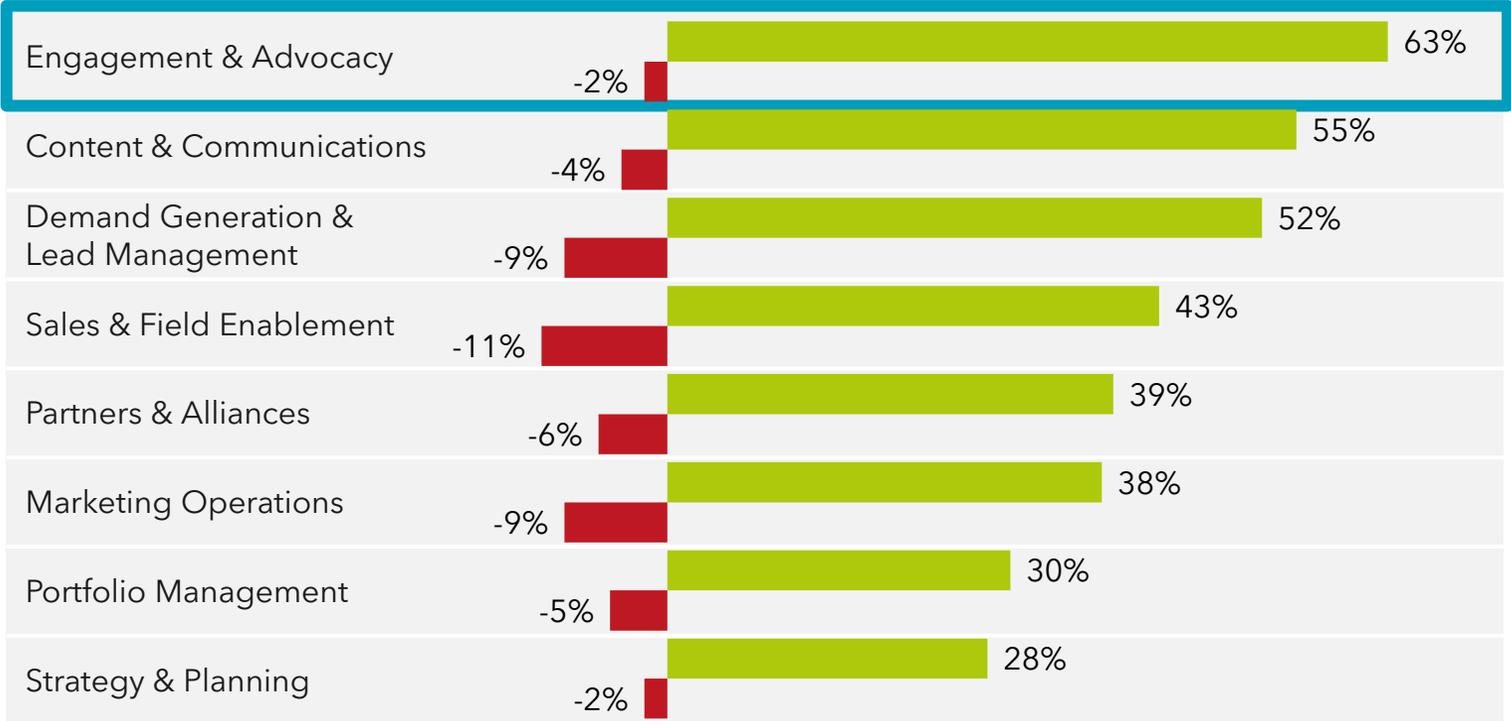
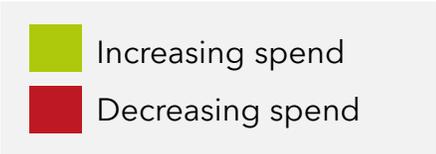
The Journey



Marketing is upping the ante in Engagement and Advocacy

What are your spending plans in FY2022 for the following budget categories?

% of respondents (N~46)

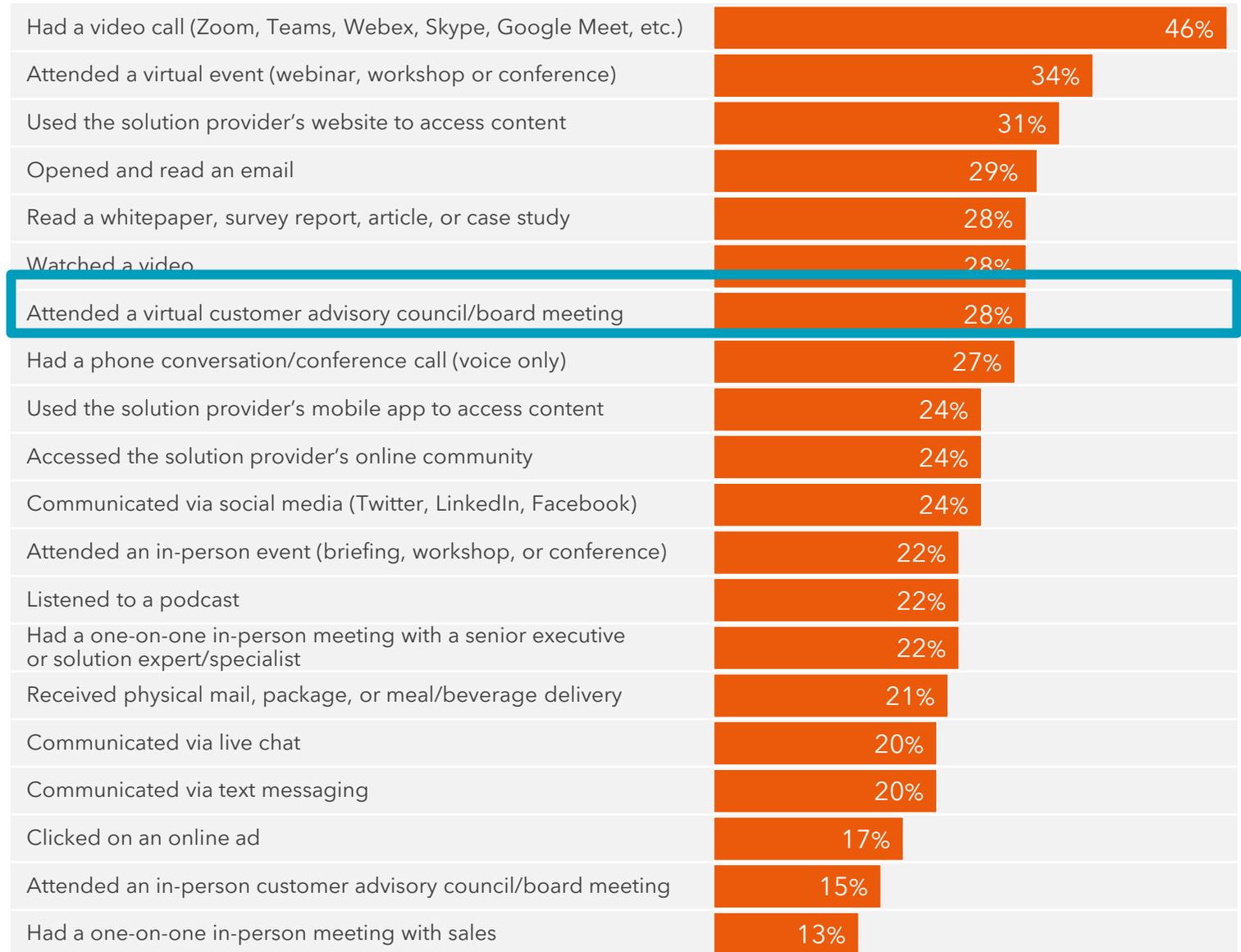


How Executives Engage

In the last three months, in which of the following ways have you engaged with solution providers (including both technology providers and professional services firms/systems integrators)?

% of respondents
(N=416)

Note: Multiple responses allowed.
Source: ITSMA, How Executives Engage Survey, Part 2, September 2021



The Starting Point



How to start your Customer Advisory Board?



Stakeholders and Budget

- Teams that will benefit from this program
- In-Person vs. Virtual budget
- Team involvement

Guidelines

- Objectives
- Benefits
- Duties
- Tenure
- Meeting Frequency
- NDA

Recruitment

- Timeline
- Nomination process and criteria
- Approval of recommended members
- Formal invitation

The CAB



Citrix Customer Advisory Board

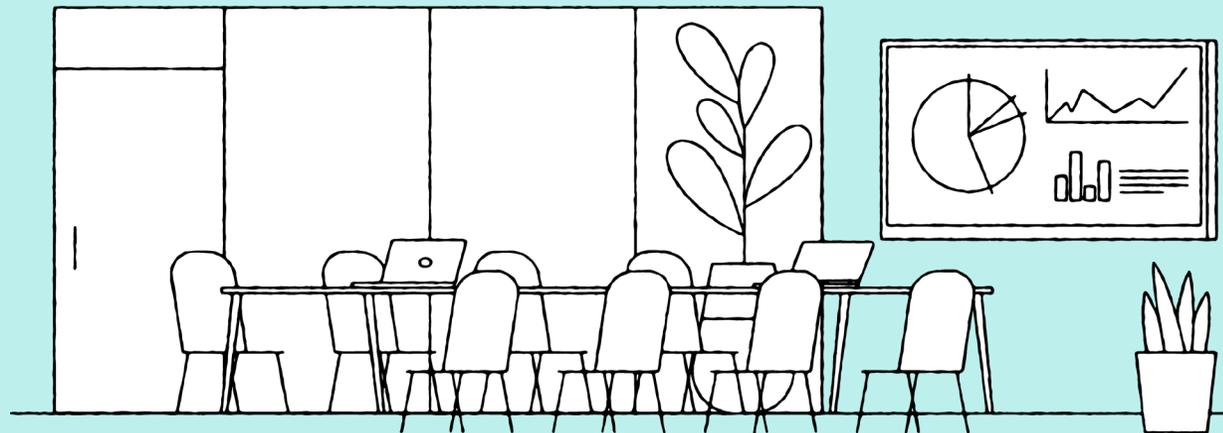
Objectives

To provide the Citrix leadership team a forum for gathering **executive customer insights** around strategic computing initiatives.

Members of the Customer Advisory Board are asked to **share their perspectives on IT market direction**, vertical industry trends and the competitive landscape.

Benefits

Gaining insight into **confidential Citrix business and technology strategies** as well as the ability to influence their direction, access to key Citrix corporate and product line executives, and networking opportunities with peers from industry leading organizations.





CommonwealthBank

DTCC



Exelon

ARCA CONTINENTAL

ASSURANT

Malux



Liberty Mutual INSURANCE

aetna



verizon

MCKESSON

NOVARTIS NEDBANK

Epic

KEMET

a YAGEO company



Willis Towers Watson

XXX Lutz

J.P.Morgan

Kelsey-Seybold Clinic
Changing the way health cares.



AUTODESK



SAAB



Cigna



Mass General Brigham



UBS



Ministry of Economic Affairs and Climate Policy



JOHNS HOPKINS MEDICINE

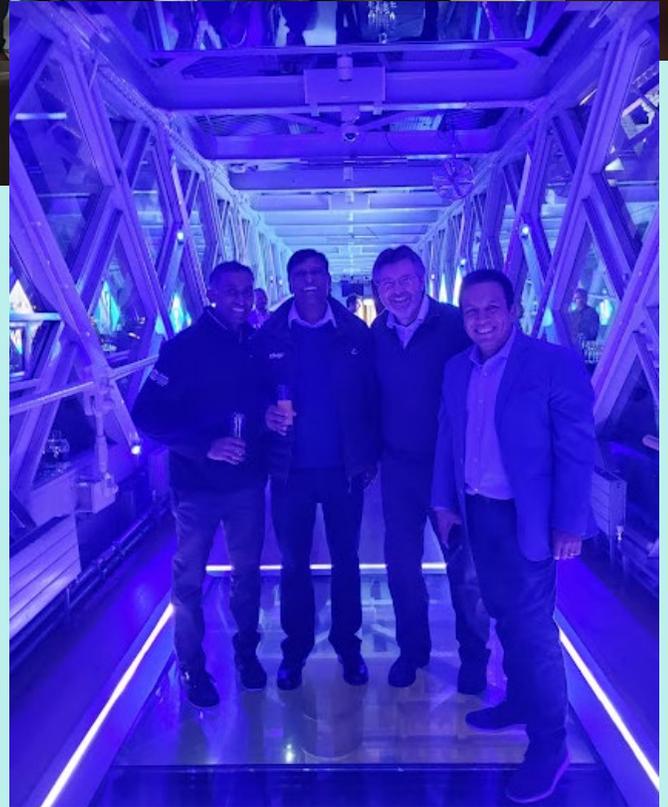
The Meeting

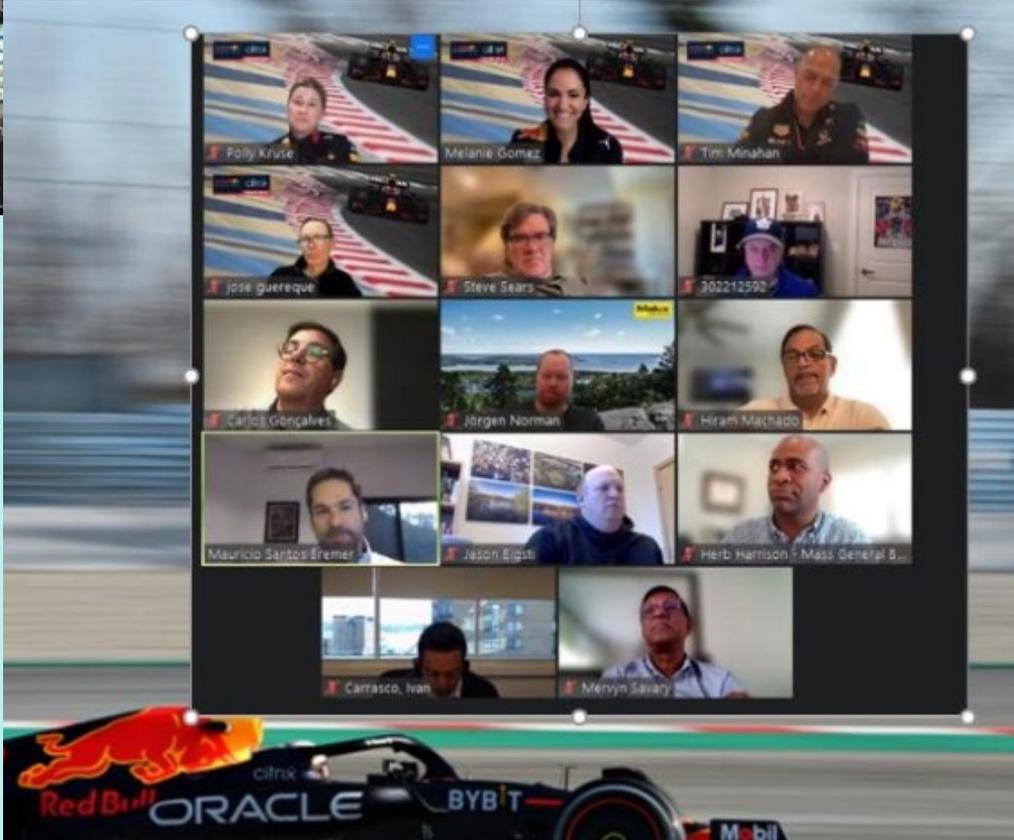




The Question: In-Person vs. Virtual







The Members









Why do you like attending?

Jörgen from Sweden

“Getting the chance to **meet peers from different parts of the world** gives me insight in their cultures, what challenges they meet.”

“I am given the **opportunity to speak in front of tech leaders** of the world and change the path of a global company’s strategy.”

“The **ability to travel** to different part of the world I would never do otherwise.”



Ivan from New Jersey

“The number one reason is because I feel that I can **influence change and direction of a product** by providing feedback on the technologies we use”

“It is more grateful to see when **something comes up to production and you push a bit for an idea/a need**, like PVS in Azure and the Image portability services, something I requested a while back and I even remember getting some push back, but it is now available, this is so meaningful and gratifying to see a product come out to be available to many customers.”

“**Have fun** while doing it and enjoying time away from work ”

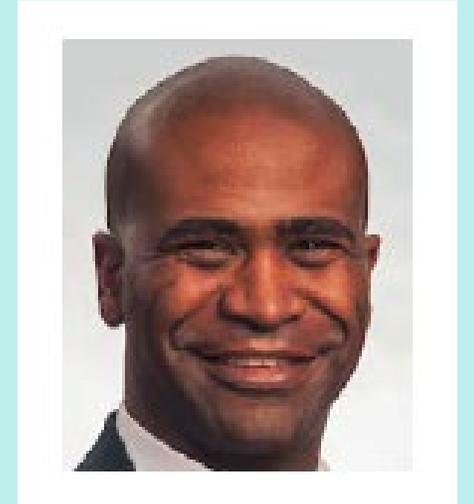


Herb from Massachusetts

*“ It’s been a **great experience to give my feedback** to Citrix on a regular basis regarding various aspects of their business whether it be with their products, services, or overall engagement approach.*

*I feel as though Citrix has been **genuine in listening to the feedback** from this group and willing to adjust to better meet their customers needs and address their concerns.*

*The CAB has provided me the ability to engage directly with Citrix leadership, building a **level of trust that has paid off in better collaboration of initiatives that has benefited both organizations**”*



Mervyn from South Africa

“CAB involvement is personally very exciting and hugely valuable from the info sharing and insights that are shared by fellow CAB attendees.”

*Their experience and wisdom that is freely available and shared has helped me grow in my own journey. In addition, the professional relationships and the friendships that have developed between the members has been clear to see and also of great benefit for all. It is also clear that despite the differences in geography & background, **we all share many common values, focusses and life approaches.**”*



José from Mexico

“Me gusta poder dar mi opinión libremente y ayudar con las implementaciones. Si el nuevo proceso me ayuda, beneficiará a muchas otras empresas.”

*Sé que a veces soy duro con ciertos problemas, pero es solo porque quiero asegurarme de que **Citrix tenga éxito en mi empresa.** Tengo pasión por lo que hago y todos los diferentes proyectos me han convertido en el profesional que soy hoy.*

*Por todo lo anterior, espero seguir formando parte del **CAB hasta que me jubile**”.*

CITRIX



The Listening and The Acting



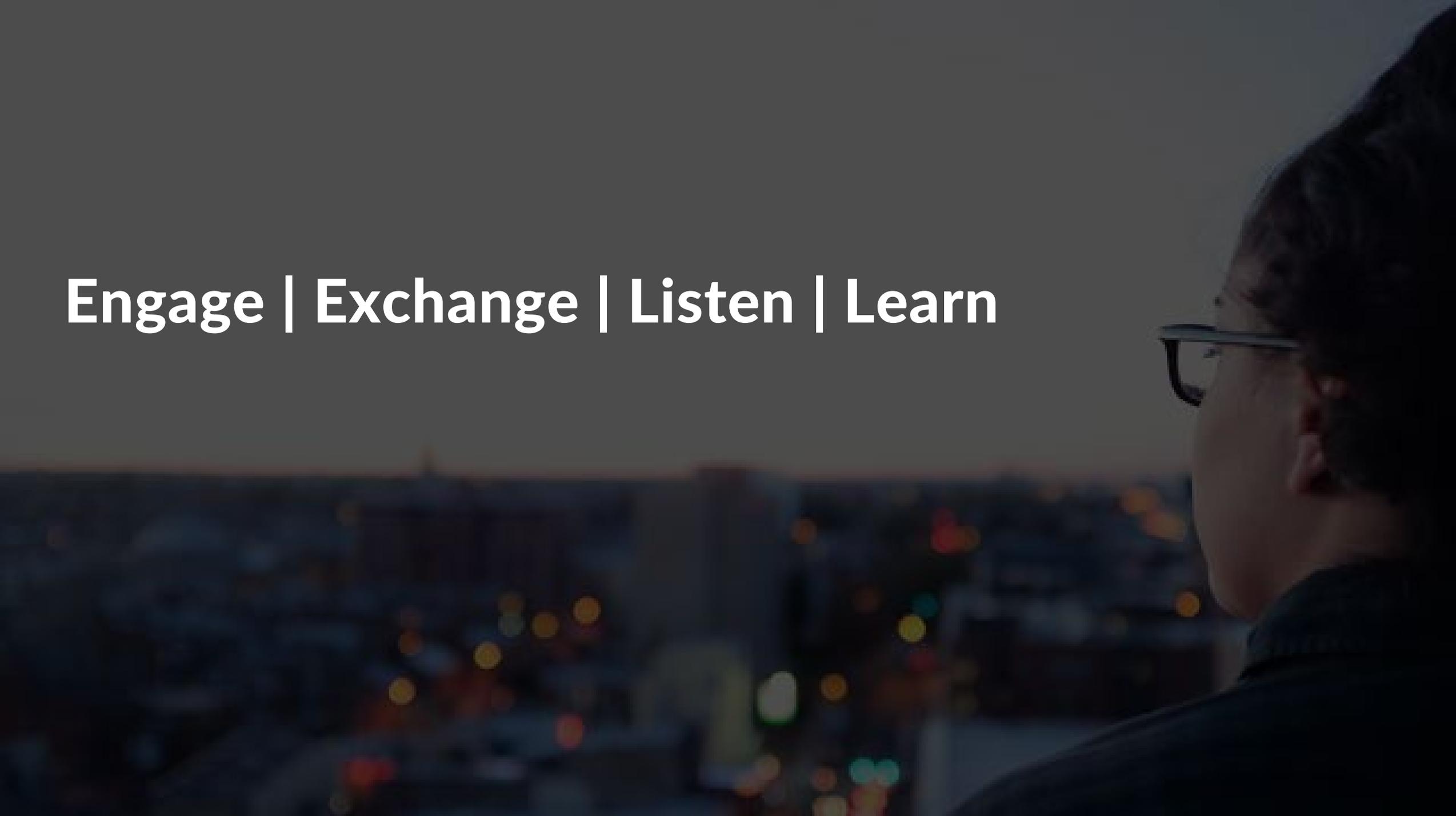
Feedback from Sales Team on CAB Program

*“This program gives them **regular access to Citrix Exec’s**, giving them that feeling of shared goals and an input into our roadmap, be that technical and/or business. In addition, with any opportunities in mind, I can brief the Citrix Exec and have them discuss with the customer in a safe environment and provide important intelligence back to us as a field team.”*



*“For me and the whole Novartis Citrix team, having Katerina as a CAB Member was a **significant added business value** and makes me very proud that a customer like Novartis is willing to participate. Furthermore, this platform has helped us to build bridges between our Execs and client to make our solutions more visible at Novartis Mgmt. As well, we generate over 4 Mio US\$ New & TTU & CCS Product revenues in the last 15 months with potential to grow more.”*

Engage | Exchange | Listen | Learn



“

Working hard for something
we don't care about is called
stress; working hard for
something we love is called
passion.

SIMON SINEK

