

COMMUNITY TEAMS

BUILDING ADVOCACY PROGRAMS



# The NEW Community Manager Handbook

21 Lessons from Community Leaders

COMMUNITY PLATFORMS

ABILITY DIGITAL

DIVERSITY, EQUITY, INCLUSION, & BELONGING

ENGAGEMENT MIGRATIONS CAREERS

MEASURING WHAT MATTERS PROFESSIONAL DEVELOPMENT VIRTUAL EVENTS

# Unlock the Power of Your Community

A customisable community engagement platform that works for your organization and your users

- **Build presence and awareness**

Promote and differentiate your brand value while attracting community members.

- **Structure and automate**

Drive participation by centralizing and automating the management of member data, content, and communications.

- **Stimulate and engage members**

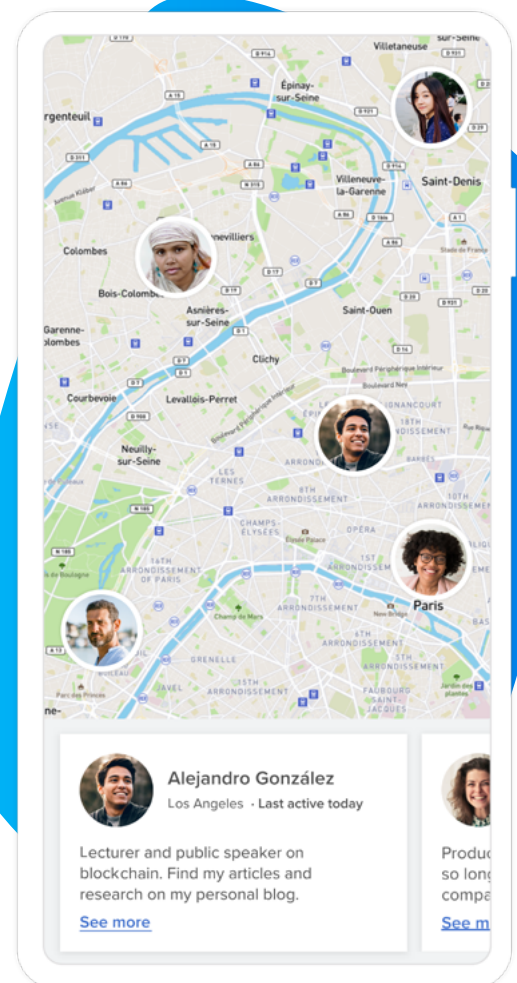
Build a committed and loyal community by facilitating connections, interactions, and sharing between community leaders and members.

- **Empower members and foster connections**

Empower your members to achieve personal and community objectives by enabling them to make meaningful connections, share content and knowledge, and find opportunities.

- **Monetize and drive ROI**

Create paid membership plans, manage online donation campaigns, process payments, and more directly within the platform.



[Learn more](#)

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## Meet The 2022 Contributors

This handbook wouldn't be possible without the contributions of the 21 community professionals who shared part of their community journey. As part of the conversations, we asked each of them, "What are the challenges you've faced? What lessons did you learn? What would you do differently?", and used their answers to give you a look at how they tackled common challenges.

There are interesting common traits among the contributors — even those from very different backgrounds. Empathy. Patience. Understanding. And, a surprising amount of imposter syndrome. Turns out that even some of the industry's most successful community professionals still feel like they have something to learn. Maybe that humility and passion for learning are part of what makes them so successful.



### JEPHTAH ABU

Community Manager;  
Cerulean Blue  
*On Getting Started in Community*



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## Meet The 2022 Contributors



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### VEE VOPHAM

Community Programs Coordinator;  
Pantheon  
*On Starting a Community*

## Welcome to The NEW Community Manager Handbook

We first published The Community Manager Handbook in Spring 2015. Pre-TikTok. Pre-Ted Lasso. Pre-COVID-19. The community world has changed a lot since then. Community technology vendors have come and gone or merged, and people just starting their careers seven years ago now hold an amazing array of leadership positions at incredible global communities.

One thing that hasn't changed is our mission: The Community Roundtable was established to document, research, and define what it means to be a professional community manager. Over the last 13 years, we've collaborated and learned with thousands of community management professionals in TheCR Network. We're lucky enough to have a front-row seat to the innovative community work our members do, and we want to share some of that with you.

Our hope is that The NEW Community Manager Handbook provides ideas and inspiration for your community work, and challenges you to try something new. The 2022 edition doesn't replace the 2015 one; instead, it adds new voices to the global community conversation with data and insights from our State of Community Management reports.

This handbook would not be possible without the years of experience and hard-won successes of the community professionals with whom we work — we encourage you to reach out, connect with, and thank them for their insights. It's been our privilege to collaborate and support them, and we hope you find their expertise as valuable as we do.

Jim Storer, Founder  
The Community Roundtable

# Defining Community and Community Management

At The Community Roundtable, we define community as:

**Com·mu·ni·ty (n.): A group of people with shared values, behaviors, and artifacts.**

All three elements of our definition matter. Remove a single component and the community's glue comes apart. Community managers are tasked with ensuring the values, behaviors, and artifacts of a specific community are shared in a way that benefits the community members and the sponsoring organization.

The good news? Successful communities drive results! Community programs can:

- Increase customer satisfaction and empower positive behavior changes
- Lower costs
- Speed innovation
- Connect geographically separated members
- Foster the environment for long-term culture change

The not-so-good news? *Communities don't run themselves.*

Despite the incredible progress in understanding the business of community management, a whopping 29% of programs report a lack of resources as their largest challenge. The more resources a community management team has, the more they can do, which generates better results.

The great news? We have 13 years of industry-standard models, frameworks, training, and research to support community professionals on their journey to success. And we're sharing our updated findings with you!

# The Community Maturity Model™

We developed the Community Maturity Model (CMM) in 2009 to help organizations understand, plan for, and assess the performance of community and social business initiatives. Our clients use it as a community management checklist, planning tool, and framework to assess their progress.


We use the CMM to organize our research, curated content, and training services to provide industry-standard terminology and benchmarks to help community professionals plan their strategy, implement proven tactics, and advocate for their programs.

Our CMM articulates two concepts required to advance the business of community.

First, it defines the eight competencies we believe are required to build successful business communities. Second, it articulates how these competencies progress from hierarchical organizations to those that have fully embraced a networked business approach.


**The Community Maturity Model**

1




Hierarchy

2




Emergent Community

3



Community

4



Networked

	1	2	3	4
<b>Strategy</b>	Competitive	Reciprocal	Cooperative	Interdependent
<b>Leadership</b>	Directive	Engaged	Influential	Inspiring
<b>Culture</b>	Resistant	Contributive	Supportive	Collaborative
<b>Community Management</b>	Absent	Encouraging	Mentoring	Empowering
<b>Content &amp; Programming</b>	Structured	Responsive	Emergent	Co-created
<b>Policies &amp; Governance</b>	Rigid	Restrictive	Flexible	Inclusive
<b>Tools</b>	Ad hoc	Defined	Integrated	Adaptive
<b>Metrics &amp; Measurement</b>	Transactional	Experiential	Behavioral	Strategic

Learn more about how you can use the Community Maturity Model and our companion Assessment tool to benchmark your community for free.



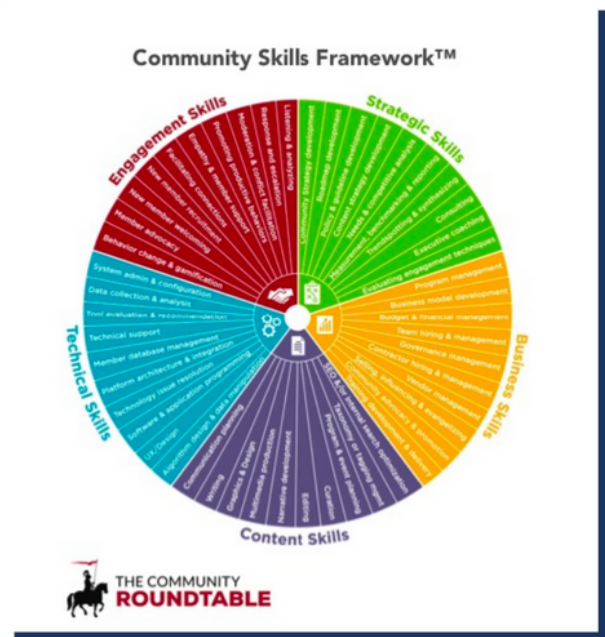
# The Community Skills Framework™

While the work of a community manager is critical to the success of their program, much of what they do is invisible to the community. We call this the "iceberg effect;" the work that's visible to the community is supported by a vast body of work beneath the surface — the planning and coordination done behind the scenes. Without these important tasks as a base, the rest of the iceberg would topple over.

While community managers perform a number of common tasks, the roles themselves are becoming increasingly diverse. There is no single definition of "what a community manager does." The community's focus, its size, and its use case all dictate what type of management is required for the community to thrive. Combine that with a growing community that can support specialized roles like, community operations manager, strategist, and technical lead, and you have the many skill sets that add up to a great community manager.

Our Community Skills Framework™ includes five skill families with 10 skills in each, prioritized based on what we learned from our extensive community management research. Is this every skill a community professional needs? Of course not! But it's a great foundation for understanding what skills typical community managers have, and what to focus on as you grow throughout your career.

Learn more about the 50 essential community management skills and complete our skills assessment [here](#).



# The Community Engagement Framework™

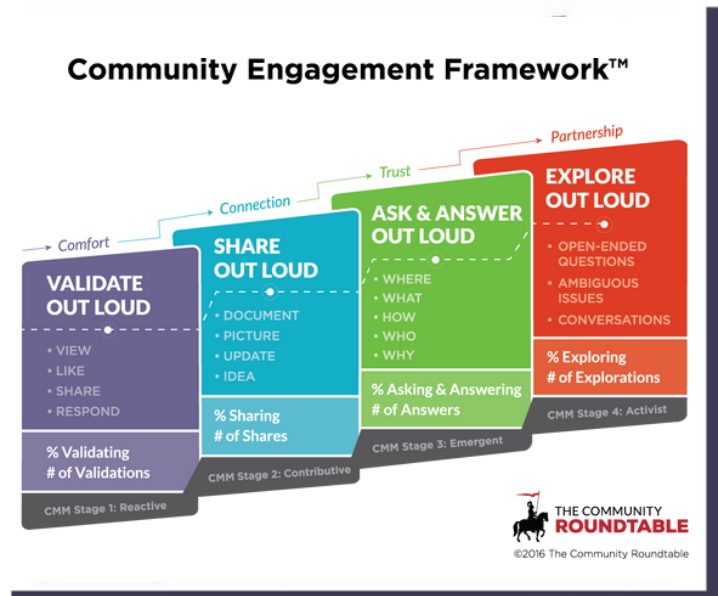
Our Community Engagement Framework articulates the four stages of culture change, and documents how cultures move from transactional relationships to collaborative relationships that allow people to Explore Out Loud, a core attribute of collaborative and innovative cultures.

Communities are used to establish and extend social trust, which is required for broad and deep engagement. By breaking down engagement behaviors into four categories, the Community Engagement Framework allows organizations to measure their culture and understand what percent of their constituents are:

- Validating
- Sharing
- Asking & Answering
- Exploring

By measuring what percentage of a community is exhibiting each of these behaviors, and in what volume, you can see how passive, reactive, open, or proactive the culture is. Does the culture support only passive and reactive behaviors, or do individuals feel confident enough to take ownership of problems and solutions?

Learn how you can use this data to prioritize and focus your approach — creating programming and engagement strategies to nudge the community along the engagement curve, ensuring social validation and rewards along the way.



## Community 101 | Intro to Community Models and Frameworks

Whether you're new to community management, or just want to review the fundamentals, this short, on-demand course gives learners a comprehensive overview of the four frameworks and models that form the foundation of successful community programs.

You can complete this free course in TheCR Academy to receive your certification in Community Models and Frameworks. Learn more or start now.



# VEE VOPHAM

Community Programs Coordinator; Pantheon

## ON STARTING A COMMUNITY

Sometimes we have Imposter Syndrome, but the key thing in community is empathy and being able to connect authentically with people.



*Use Case: Employee Community*

*Platform: Salesforce, Slack, & Discourse*

*Years in Community: 5*

**Viet (Vee) VoPham is currently the Community Programs Coordinator at Pantheon, where he focuses on supporting and managing their growing developer community.**

While this is Vee's first community title, it's not his first time working in community. Like many community professionals, this digital native has been acting in a community capacity long before he even knew that was a thing.

"I've been involved in online communities since the MySpace days, and for me, community is bringing people together. I love talking to people. I'm a people person!"

**When starting a community, it's important to have a clear goal and objectives. "Define what success looks like."**

Vee suggests listing the objectives you hope to achieve, and defining what community health looks like. "One of the first things I do is draft a code of conduct. It's critical to set expectations for people joining the community."

Another tip? New members should opt-in to a standard code of conduct ensuring they understand engagement norms, and clearly communicate what is expected.

**In his community experiences, from using Myspace to Salesforce Community Cloud, Vee has noticed inclusion and diversity go hand-in-hand.**

"Successful communities are super inclusive. They invest in inclusivity first, and it shows. I see a lot of communities that are just getting started over-invest in diversity at the expense of inclusion.

"If you prioritize inclusion, then diversity will come naturally. Your community will be as diverse as possible, because you're making it inclusive for everyone."

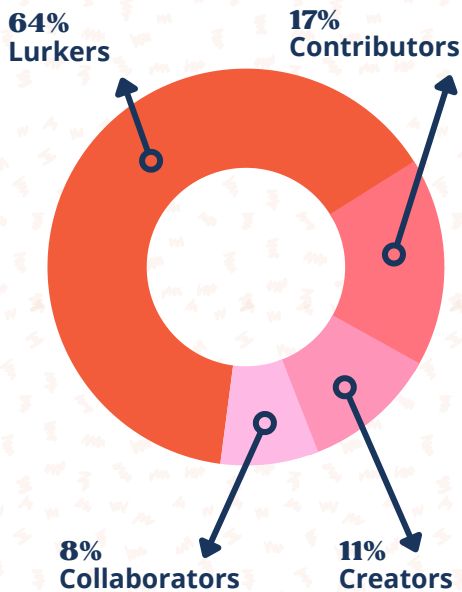
**Another common challenge for community professionals is Imposter Syndrome.**

"One of the challenges [at my current role] is that I'm not a developer; I don't have a technical background, and my community is mostly developers. It was hard for me to meet them where they're at."

Great community managers can transcend a lack of technical expertise. "Are you able to connect with people, and understand different perspectives and situations? All the hard skills, those will come. So many soft skills are transferable to community roles."

# STARTING AN ONLINE COMMUNITY

## Average Engagement Mix



Once you have defined the behaviors you want to encourage, consider what the ideal engagement mix for your community would be. The ideal percentage of lurkers, contributors, creators, and collaborators will be different for every community type, but our research shows the average mix at 64%, 17%, 11%, and 8%.

Then, *start small*. Work with a limited set of early members to establish the culture before inviting in more members. By spending time with a small group to establish the community culture you want to foster, initial members will model and set expectations for every member going forward.

By establishing culture early, new members will be able to acclimate and conform to the community's social and behavioral norms more quickly.

## Advice from Vee on starting a new community:



**1** **Set yourself up for success.** Vee recommends identifying a few key people you can rely on to get the conversation started in different discussions or forum threads. "If someone is the first to comment on a post, they might feel intimidated. People are much more comfortable joining a conversation."

**2** **Research. Research. Research.** There are so many valuable community resources available today. Make sure you follow people who worked in similar roles or industries on Twitter and LinkedIn. Vee says, "Get as involved in community as you can. Sign up for community events. Follow community influencers, engage with them on social media. Don't be afraid to reach out!"

**3** **Accept that engagement might always be challenging.** Even mature communities experience an ebb and follow of engagement — and that's OK. "Building and maintaining engagement in the community space is a challenge. Find commonalities between all the members to create content and programs that will interest a wide segment of your community audience."

# LISA ALLISON

Senior Community Strategist; Analog Devices, Inc.

## ON SELECTING A COMMUNITY PLATFORM



You want to make sure a new community platform is going to grow right along with you.

*Use Case: Brand Community*

*Platform: Verint*

*Years in Community: 10*

When Lisa Allison started her community journey at Analog Devices, Inc., their external community program was primarily used for support. Fast forward to today, and Lisa works with a robust global community, which includes blogs, webcasts, and educational programs.

**The very nature of a global community, including a large number of non-English speaking and writing members, led Lisa and her team to aggressively evaluate potential community technology partners.**

"When you buy a car — if you live in Florida, you don't get snow tires! Think that way with your community platform." How are you going to use the platform? What is the business model? Defining requirements is critical.

**Lisa recommends looking at not just the features you need, but also what you might be paying for that you don't need.**

"Do you need all the bells and whistles they offer? Do you have a technical person in house?" Thinking about both the use cases for your community, and the support you have internally to run the community, will help you make informed decisions when comparing vendors.

**Another smart evaluation criteria? Think about where you want your community program to go.**

"I thought, 'What if we want to take it to another level? What if we start to do some other things like webcasts, training, and education — more than just support?'"

When considering the future, widen your scope to more than just features or programs. How scalable is the technology? You want a community platform that will grow with your membership, community team, and your overall organizational strategy.

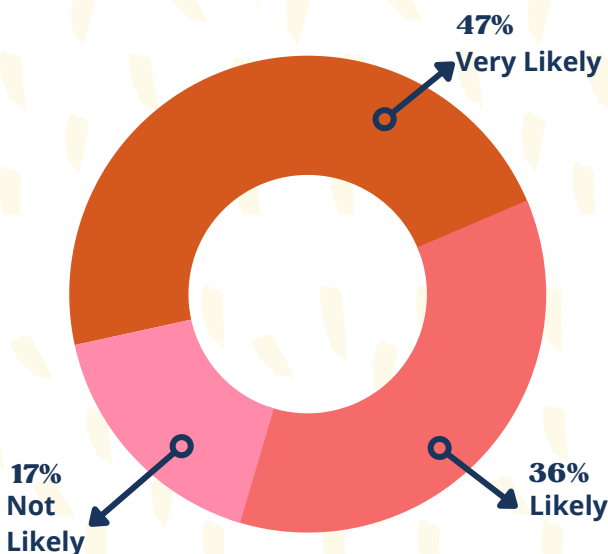
**When comparing technology, be ready to get your hands dirty.**

"When I got down to the final three, I was aggressive in asking for a sandbox. If you want us to buy your product, you should be willing to give prospective clients a demo environment for them to explore."

Ultimately, Lisa found the solution that was right for her, and her global community. "The platform has lived up to my expectations, and their level of support has exceeded my expectations!"

# SELECTING A COMMUNITY PLATFORM

How likely are you to recommend your community platform vendor to a community peer?



There's no one "best" community technology, there's only the community technology that's the best fit for you.

Doing your due diligence on community platform vendors is critical to finding the right solution for your organization. This includes defining specific platform requirements, considering your community roadmap, and comparing options that fit your budget.

Consider chatting with your community peers; our State of Community Management research shows that 83% of community managers are likely or very likely to recommend their platform vendor. Critical feedback from peers already using the platforms you are evaluating will provide invaluable insight into what working with each specific vendor looks like.

## Lisa's advice for selecting the right community platform:



**1 Start with strategy.** A good strategy will help you prioritize and identify key behaviors you need to enable — giving you strong guidance as you look at and configure platforms. Without that alignment, at best the conflict will keep you from efficiency, and at worst, hamper engagement and value.

**2 Put yourself in your members' shoes.** If your key behaviors are available in the platform but difficult to use, you'll see constricted engagement rates and value. "I asked people, 'What do you like, don't like about [our current platform]?' That was a great way to start honing my list."

**3 Define must-haves and nice-to-haves.** "The platform I chose [had to] replicate our current support model. That was really important. Our new solution had to at least meet the minimum requirements of what we were doing for support that day."

# JEPHTAH ABU

Community Manager; Cerulean Blue

## ON GETTING STARTED IN COMMUNITY



**I love learning. I love talking. I love interacting. And you can translate that into a career.**



*Use Case: External Community*

*Platform: Slack and Discord*

*Years in Community: 5*

### **Jephtah Abu's community origin story will resonate with a lot of community professionals.**

"I started off my career as a social media manager, then moved to cybersecurity. I have a background in coding, but I wasn't fulfilled. I volunteered with some nonprofit organizations as a program director, and loved it. I didn't realize I was acting as a community manager!"

Jephtah recommends this approach to anyone looking to get started in community. "A lot of companies are realizing the power of communities and they need community managers. Find the area you're passionate about, and volunteer."

**Another way to get started? Network, network, network.**

Networking is critically important, and the universal nature of social media has made it easier than ever to find people you can learn from online.

As you network, you'll meet people in different roles and in a variety of communities. After all, community building is really about connections: With people and connecting others.

Making these connections before you need help with a job referral or recommendation is key. When you spend time building relationships, you're more likely to find people willing to help you find your place in the community world.

**When it comes to community skills, Jephtah recommends an unusual #1: Boundary setting.**

"As a community manager, you take on a lot of emotions. Members might see you as a therapist or friend when you're just doing your job. Having strong personal boundary setting is key"

**Jephtah also encourages new community professionals to prioritize inclusivity from day one.**

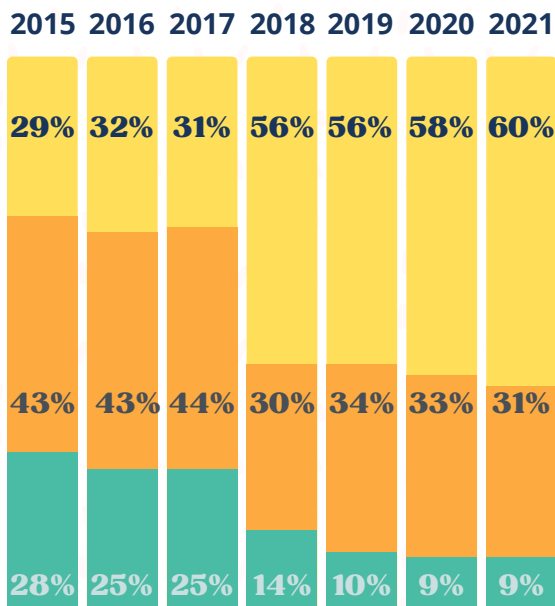
"Consider how you talk to community managers from different parts of the world." Being aware of different cultural norms and language differences to ensure you relay information so as not to create distrust or cause harm is important.

If you're just getting started, Jephtah has this final advice, "When you have a passion for something, it keeps you going."



# GETTING STARTED IN COMMUNITY

## Community Staffing Over Time



Now is an amazing time to explore a career in community management. Our State of Community Management research has shown that since 2015, organizations have steadily invested in more full-time talent for their online community programs.

Combined with the overall positive perception of community programs within their organizations and a global shift to hybrid work environments, we can confidently say the demand for community professionals isn't slowing down any time soon.



## Jephthah shares three tips for getting started in community management:

# 1

**Research different community roles.** Community management is becoming a very diversified field, with roles ranging from operations, to content creation, to technical architects. Finding a good fit for your career interests and skills is increasingly important. "Self-reflection is key. What do I love doing? What do I enjoy? What are my interests? The community management field is so wide!"

# 2

**Look for roles where your passion and skills align.** Jephthah urges those new to community to lean into their passions. "Your interest is key, because if you don't focus on what interests you, you may end up doing community management for a company you hate."

# 3

**Invest (time) in professional development.** You don't have to spend any money to start learning about community best practices. Jephthah recommends taking free online community courses, and looking for resources aligned with what interests you about community management.

# CATHERINE HACKNEY

Community Management Consultant; Confident Communities Consulting

## ON MEMBER ONBOARDING



**Small incremental increases in member engagement are more sustainable for your community in the long run.**

*Use Case: Association Community*

*Platform: Higher Logic*

*Years in Community: 9*

**When Catherine Hackney got started in community management, she was shocked to find a lot of association members at the organization she worked at didn't even know the online community existed.**

"I went to our annual conference, and I was talking to members, many didn't even know the community existed! It blew my mind."

Catherine walked away with the new understanding of a huge knowledge gap for members — and a big challenge to tackle.

"A lot of members might not have a compelling reason to log on and dig in to your community. We focused on getting members online and engaged with an onboarding series."

**Start by asking questions, then really listen.**

Catherine started by reviewing old emails and prompts with a focus group. By reviewing actual materials members received, they could understand where the disconnect was taking place.

"This was huge — actually talking to members and figuring out what their questions are versus just taking our template and forcing it to work!"

Through these conversations with members, Catherine found very little user input had gone into the current outreach materials, and content was almost entirely based on what the staff thought members would find valuable, instead of what members were actually looking for in the community.

**Don't assume your members know what you know.**

It's easy to forget your online community might be complicated and overwhelming to members who aren't familiar with online communities. Catherine suggests a slow and simple approach to onboarding programs.

"In each of our new onboarding messages, we use the questions members asked about, like, 'How do I find this tool?', or 'Does this resource exist?'" By targeting problems that actual members were struggling with, Catherine increased engagement and improved the overall community experience for members.

Her final advice? Don't look for monumental gains overnight. Incremental engagement is more sustainable in the long run.

# MEMBER

# ONBOARDING



## WELCOME

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It can be hard to remember that while onboarding can be boring and routine to the person conducting it, it's all brand new to these members.

Automation is a powerful tool that allows even the smallest community team (we see you, lone wolves) to have a big impact on the way new members start their community journey.

The goal of all new member programs is to set your members up for success in the community, and that's going to look different depending on your use case, the size of your community, and your ideal engagement goals. You want new members to have good first experiences, and see how to engage and get valuable interactions to make their time in your community rewarding.

## Catherine recommends scaling your community team (even if it's just you!) through automation:



# 1

**No one wants advice from a robot.** "We made sure the 'reply-to' field of our templates was my actual email address. We wanted to be sure members felt it was coming from a real person."

# 2

**Onboarding isn't just for new members.** Catherine saw such a jump in engagement from automated onboarding emails that she decided to use them to reach out to more established, less active members. "We now send the FAQ series to all existing members who aren't as active as we'd like. It's a nice reminder, 'Hey! The community is here!'"

# 3

**Don't set it and forget it.** Catherine urges you to check your automated campaigns regularly. "I like to review the campaigns quarterly. Is the timing working? Are the right people getting the right messages?" Catherine also reviews templates and messaging to reflect site updates and new content.

# MARY LIGHTFOOT

Senior Digital Learning Manager; Gallaudet University

## ON ACCESSIBILITY



**Access by everyone, regardless of ability, is essential.**



*Use Case: Learning Community*

*Platform: Salesforce/Appinium*

*Years in Community: 15+*

**Like so many online community professionals, Mary Lightfoot started her career doing something else entirely different.**

She is a certified ASL interpreter, which is where she got her initial interest in community. Working as an interpreter for Gallaudet University, she provided direct services while also mentoring and coordinating events, and it piqued her curiosity about community approaches to connecting.

Working with differently-abled members and stakeholders strengthened her belief in universal design for all types of communities.

**Universal design is providing information in a way a variety of people can engage with it without something extra, or different, being shared.**

Mary encourages community builders to consider all people, not just your particular audience. "You need to make sure what you have is accessible by all people, allowing for a universal design so anyone can be a fully-participating member of the community."

**Universal design may seem daunting for a community that's just beginning to prioritize accessibility, but Mary suggests starting small.**

"You can start with something very simple, like making sure there is an alt-text description for every image you have on your site."

By rolling out small and specific incremental changes slowly, your accessibility efforts have a better chance to gain traction and become sustainable practices.

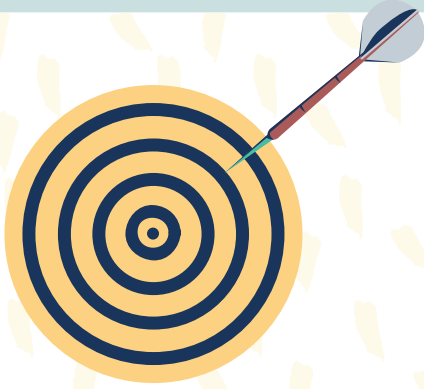
**You can also think about how to incorporate new accessibility features into existing programs and events.**

"When you have someone presenting at a live or online event, they can first identify themselves and what they look like — what clothes they have on." This is a simple practice everyone can adopt until it becomes a natural part of their culture; so if someone is blind or deaf-blind in the audience, they can have a similar experience to someone who is sighted.

**Her final advice? Be intentional.**

"Start with intentionality. You'll ensure accessibility is thought of, and there's a system for including it with everything you do, and with all programming you set."

# ACCESSIBILITY



**YouTube automatic captioning typically provides ~60 to 70% accuracy.**

Accessibility is not a "set it and forget it" initiative — there will always be room for more. According to the University of Minnesota Duluth, YouTube automatic captioning typically provides about 60 to 70% accuracy. Factors include a person's accent, their rate of speech, and how specialized the language is (i.e., are there a lot of specific industry terms vs. generic speech). Unfortunately, these human factors make automated captioning an imperfect solution.

When considering accessibility options, remember that unless it's accurate, like meaning 99 to 100% accurate, it doesn't provide access to a person who's relying on that as their primary source of information.

## Mary shares three ways you can focus on accessibility in your community:



- 1 Ask your community what they need.** When planning accessibility services for particular events, you can and should ask your audience what they need. Knowing an interpreter is required, for example, can help you secure the appropriate options ahead of time.
- 2 Start small and build, build, build.** Don't wait to start your accessibility efforts until you think they are perfect. "Start with something small; if you already have something small, deepen what you have; if you're deeper, how can you finesse it?" You don't need to have a comprehensive universal design solution to start providing accessible options to your audience.
- 3 There are many ways of being accessible.** Organizations are increasingly considering a wide variety of accessibility options. Mary recommends widening the scope of your accessibility efforts to include not just deaf, blind, or hard-of-hearing members, but to also consider those with different cognitive and learning abilities.

# ASHLEIGH BROOKSHAW

Senior Manager Digital Customer Experience; NICECXOne

## ON DIVERSITY, EQUITY, INCLUSION, & BELONGING



I cannot say enough good things about the ability to incorporate change management methodologies and principles into your community building.

**Use Case: Customer Community**

**Platform: Salesforce**

**Years in Community: 10**

Ashleigh Brookshaw has spent her career building community in the insurance, association, and now software spaces, so she knows her way around the foundations of community management. Still, some things surprise her.

"You may think people would want to create a welcoming environment for all but that's not always the case. There may be organizational departments that are only focused on their own deliverables and objectives. They may not be thinking from an organizational and strategic perspective."

One barrier Ashleigh has seen to progress as it relates to Diversity, Equity, Inclusion, and Belonging (DEIB) and an organization's culture is that the organization just isn't ready for it.

"I know people don't necessarily like to have [DEIB] conversations, but your executive stakeholders — your senior leadership — might not see it as a priority."

Ashleigh has seen organizations where DEIB isn't set as a strategic priority and can be viewed as a check-the-box exercise. For example, "We're going to make a statement on DEIB" with no tangible action or resourcing to support it due to other priorities.

Ashleigh is emphatic this *isn't* the correct approach to authentic DEIB progress. "A better approach? See how can you incorporate DEIB into what you're already doing and enforce accountability."

**Focus on building an authentic DEIB strategy from day one.**

"If you're only engaging with your community members during [respective and recognized] DEIB months — Black History in February, Women's History in March, Pride in June — if those are the only times you're engaging your users, that's inauthentic and not sustainable.

Diversity, Equity, Belonging, and Inclusion are foundational principles and can include identifiers including but not limited to race, gender, and perspectives. Everyone brings their unique experiences to community building and participation.

Ashleigh recommends exercising immense patience. Acknowledge going forward this may be a place of growth and learning for your organization and online community.

# DIVERSITY, EQUITY, INCLUSION, & BELONGING



"Having a conversation with those who haven't traditionally had to think about intersectionality can be a hard conversation. Community professionals must balance the needs of users with different identities and educating others on the importance of an inclusive approach. You have to have immense patience."

"Not everyone thinks Diversity, Equity, Inclusion, and Belonging is important, but creating a space of belonging where people feel safe to participate and express themselves is critical. I always position communities as an organizational asset that needs to be a reflection of your dominant organizational culture."



## Ashleigh's advice for building safe and inclusive community spaces:

# 1

**Take a look around.** What is your organizational tone and culture? This is an opportunity to define it for your community through programming and governance or align the community tone and culture to the organization.

# 2

**Ask (better) questions.** The best way to get the cultural pulse of your community? Ask them. "If you're not doing regular surveys or check ins with users, take the time to do so. Ask questions around culture, targeting the elements of Diversity, Equity, Inclusion and Belonging to see if users find programming relevant. How can we be delivering better content? How do you feel about our community?"

# 3

**Build a Support Coalition.** Any role at any organizations that incorporates a focus on Diversity, Equity, Inclusion, and Belonging is a very energy-intensive job. Make sure you have a supportive environment of peers and executives.

# NEIL MORGAN

Head, Digital Employee Experience Team; Glencore

## ON DEFINING THE DIGITAL WORKPLACE



**Be ready for resistance. People will look for ways to say, 'Oh, this just isn't the way we work,' or 'That isn't our type of company.'**



*Use Case: Employee Community*

*Platform: Beezy*

*Years in Community: 15*

**How would you define the digital workplace? To Neil Morgan, it's more of a concept than a product.**

"The digital workplace is really bringing together the experiences the employees have day-to-day, and how the company decides to introduce new solutions to the employees. Understanding that when it comes to modern day collaboration, the approach will vary based on the tools people have and haven't had."

Neil has focused on really redefining the role of internal communications and intranet at Glencore, looking at how IT, HR, and other teams can ensure the tools their employees need to use are well understood and accessible to all employees — regardless of location.

**One question a lot of Glencore employees had: What is an intranet, and why should I care?**

"We surveyed employees to look at how they define the current intranet and what they use it for." This helped Neil identify which tasks employees needed to achieve through the intranet. With this common language in place, Neil could move onto understanding what the intranet needs to deliver to the employees, as well as how, and through which channels, they expect to receive that information.

**Glencore is a global company with tens of thousands of employees, so making sure every employee — whether they are in the field or at a desk — could access the same information was critical.**

"The intranet makes sure we have a clear view of the full catalog of tools available to the employee, and ensures from day one they know which tools they should be using, and for what purpose."

**Neil recommends using early adopters to model the behavior you want to encourage among employees.**

"Identify those early adopters, the people who are excited about this type of change. Then work closely with them to establish how this [community] approach can bring success to the company."

Now, Neil views his role as that of a service provider. "Getting a deep understanding of what employees are trying to do, and finding the best approaches for helping them achieve their goals."



# DEFINING THE DIGITAL WORKPLACE

Whether you call it an intranet, an internal community, an employee community, or something else entirely — the value of these networked approaches is clear.

Our research consistently finds an engaging digital workplace impacts both the organizational objectives and employee behavior. When defining your digital workplace goals, keep in mind the top outcomes they enable, and build your program accordingly.

## 5 Ways Community Impacts Business Objectives

- 77% increase communication efficiency and speed
- 65% empower positive culture change
- 52% speed up innovation cycles
- 48% boost productivity
- 39% contribute to higher employee retention

## 5 Ways Community Impacts Behavior Change

- 72% help build larger employee networks
- 63% increase executive/employee engagement
- 61% encourage organizational transparency
- 48% empower asynchronous work
- 37% promotes agile work practices

## Neil shares three ways you can effectively define your digital workplace:



- 1 Identify a community lead.** "Once you start, you might get a lot of questions when people see the value. If you're not ready, you could quickly be overwhelmed." Neil recommends making sure there is a designated community lead who has the bandwidth to handle inquiries and triage requests.
- 2 Community isn't "just another tool".** Be clear that an intranet isn't just a new tool you have to use. It's the comprehensive way to access content, tools, and services you need as an employee. It also provides a central way to stay up-to-date with what's happening, both around the organization and on topics of personal interest.
- 3 Take it slow and showcase the benefits.** Neil has heard from some that community just, "isn't the Glencore way." Instead of trying to change their mind, Neil focuses on the benefits to the business. Often teams are using community approaches without calling it that. Reframing the language you use can be helpful for long-time employees.

# JULIEN VAN DE CASTEELE

Project Manager; Médecins Sans Frontières

## ON MEASURING WHAT MATTERS



**It's not always bad to have lurkers, because these people are finding and consuming information, and then they return to the platform to continue consuming.**



*Use Case: Brand Community*

*Platform: AnswerHub*

*Years in Community: 6*

Julien Van De Castele has a natural affinity for communities. From early web programming, to a music blog with friends, to his current role running a community of practice, he's always been drawn to work in the community world.

Since launching a formal online community for Doctors Without Borders in 2016, he's focused on sharing their community journey through metrics.

**One thing he's learned in the last six years? There's no magic formula for community health.**

"People were expecting me to bring some sort of magic formula that would give a very simple answer about the health of the community. It was a bit stressful, because I couldn't come to a conclusion like that."

**Luckily, Julien had the key to the solution: Data. Lots of data.**

After measurement tools were in place (including Google Analytics and a platform-specific tracker), the challenge was to synthesize the different sources and provide easy-to-consume reports for his internal stakeholders.

"At the beginning, I was just sharing pieces of reports here and there. It wasn't very structured."

With a clear and concise reporting structure as his goal, Julien worked to provide a single place where any interested parties could consume the multiple data sources.

"Now, we have a single dashboard; one place where anyone can consult all the metrics and reports and really see what's going on."

**After getting the dashboard up and running, Julien encountered another challenge: The false story told by vanity metrics.**

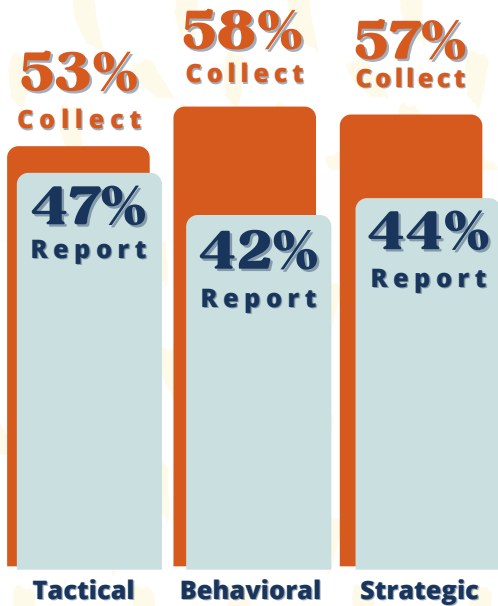
"We were really focusing on vanity metrics: How many questions, how many comments, how many new users. Those are easy stats to provide, but they don't have much meaning. Are people actually using that information? Is it useful to them? Vanity metrics don't tell you that."

To tell the complete story, his team looked at additional metrics, which revealed the community was being used in a quieter, but still valuable, way.

His advice? "You will always need to customize the metrics to tell the story specific to your community journey."

# MEASURING WHAT MATTERS

## What types of data are community teams looking at?



According to the State of Community Management research, 67% of community managers are directly responsible for determining the appropriate metrics to track, analyzing community data, and reporting these numbers back to their teams and stakeholders. Only 6% of community teams have a dedicated community analyst.

While it's critical to tailor your community reporting to your specific community, use case, and strategic goals, you can also rely on industry standards for determining what to measure. Common buckets of community measurement include: Activity tracking (tactical), behavior tracking (operational), and value tracking (strategic).



## Julien's advice for measuring what matters:

- 1 Define your strategic goals first.** What are the strategic goals for your community? Case deflection? Lowering support costs? Engaging with members? Increasing member collaboration? Use these pre-determined goals to measure what matters to your program.
- 2 Don't settle for the easy numbers.** "A lot of platforms provide [easy stats] by default, but they might not have too much meaning for your community." Tie what you measure back to your specific use case and goals, even if that requires some extra work or customization.
- 3 Ask for advice.** Unless you're on a homegrown platform, you aren't the first person to work with community metrics. Find peers for tactical and psychological support! "Other people are facing the same struggles as you, and it's reassuring to have a support system of people who understand what you're going through."

# RACHAEL SILVANO

Community Operations Manager, Product; Zapier

## ON COMMUNITY OPERATIONS



**Successful communities take a lot of effort. The more you have someone who knows what the operations are, the easier time you'll have getting up and started.**

*Use Case: Customer Community*

*Platform: Insided*

*Years in Community: 7*

**What do you do when someone comes to you with a question about your community program? What if that person is already on the community team?**

If you're at Zapier, you talk to Rachael Silvano.

Rachael is the Community Operations Manager at Zapier, and she sees this role as tangible recognition that community takes a lot of effort – having a dedicated person who knows what operations are makes everything run more smoothly.

"For me, community operations means really knowing community platforms and technologies, or being good at learning them. Community operations at Zapier also means a deep amount of cross-functional collaboration."

**Community operations is the rising tide that lifts all the (community) boats.**

With a large community team, and a lot of questions and requests from internal clients, Rachael is part triage nurse, part gatekeeper.

"If you're talking about community, it's always going to be me. I might not be the last person you'll need, but I'm always the first person you need to talk to."

Community operations is a straightforward, measurable way to scale your team, and increase operational efficiency.

"It can be an easy pitch if you're a sizable community to say, 'Well, look, you can take this one team and stretch us to the max, and we're only going to be running at about 60% efficiency.'

"But what a community operation manager does, is thread together all of the organization. Now, the community team can focus on what they're good at, so we're all at our efficiency quota."

**Community operations is more than just the tools. (A.K.A. the spinning plate theory of community operations.)**

To Rachael, the particular community tools and technology are a secondary consideration to successful community operations.

"To me it's less of the tooling. It's more the ability to be very agile and say, 'OK, I have eight things that are all running concurrently. How can I stay on top of them, and make sure we're just getting the right voices in the right room?'"

# COMMUNITY OPERATIONS



*Community Operations Manager* might feel like a buzzy new title, but in reality, community professionals have been engaging in community operations activities since the beginning of community management. An easy way to think about what falls into the operations bucket is to use the iceberg analogy.

What community management activities are under the waterline? What work isn't visible to everyone in your community, but makes everything run smoothly? As community teams become larger (we love to see it!), expect to see an increased focus on specialized and diverse roles, like Community Operations Managers.

## Take it from Rachael, you might secretly be a Community Operations Manager if:



# 1

**You love managing projects.** "Community operations is almost like being a project manager for community. There are a lot of projects, and I'm saying, 'How can we make sure it's all happening with the right people?'"

# 2

**You love learning.** "I take every professional development opportunity they offer! Sign me up, I'm into it! One of the good things about community operations is you can take a lot of different trainings about everything from data analysis, to user behavior, to gamification, and combine that into the things you're really good at. Just having those language pieces is a critical part of getting your foot in the door, and being an attractive community operations candidate."

# 3

**You like to juggle. Projects that is.** "Do you know the old trope, where there's one person with 800 TV screens around them, and they're watching all the shows at once? That's sort of how I work! I have 50 TV screens in front of me, and I'm looking at each little chunk of it. I don't own any of them completely. But I know how to pitch for almost all of them."

# APRIL UZARSKI

Associate Director, Tech Community; Xandr

## ON GAMIFICATION



**Our gamification goal is to ensure we provide meaningful recognition and rewards to members who make a big impact in the Xandr community.**



**Use Case: Employee Community**

**Platform: Slack**

**Years in Community: 7**

**As a Gold Award Girl Scout, April Uzarski is uniquely positioned to apply the theories of gamification to her community work.**

"Girl Scouts know gamification! They know how to teach people, how to get you involved and excited, but then also give you life skills along the way. That's kind of how we set up our community."

As an employee community, the Xandr Tech Community exists to help members advance their careers. By focusing gamification efforts on individual impact, April's team ensures they are equitably serving their members.

"We knew how to get people excited and involved in community programming, but it's the impact piece where we really had to sit down and be mindful."

**By exploring what behaviors they wanted to encourage and reward, they were able to chart three tiers of impact: Low, medium, and high.**

"We started by focusing on our members, and slotting them into those impact buckets to keep them engaged and bring them to the next level."

An initial challenge for April and the Xandr community team was the lack of a formal rewards program.

"That was a huge, huge miss! We thought, 'The intrinsic reward is that you can use this to move up in your career. You can put this on your resume!' Which is great, but we weren't focused on really honoring people and the contributions they were making to the community."

**Using their impact framework, they considered how to reward ideal engagement behaviors.**

"We built this really substantial rewards program in about two weeks; when we rolled it out, people were just over the moon."

The Xandr Tech Community rewards program combines intrinsic rewards, like individual and company-wide recognition, with more "Dave and Buster's-style" extrinsic rewards, like snack boxes from Snack Magic and custom Air Force One sneakers.

"Through this multi-channel rewards approach we found our members are always thankful to be thanked, but they also get really excited about the gifts we give out, as well. It's a best-of-both-worlds-solution that really resonates with our community."

# USING GAMIFICATION IN YOUR COMMUNITY



Gamification is one of those things that really resonate with community stakeholders. Badges! Achievements! Prizes! Unlock this to level up to that! Behind the buzzwords, our research shows community recognition and reward programs have a measurable impact on both member engagement and member satisfaction.

More than half of community platforms have built-in gamification features, making it easier than ever to roll out a recognition and rewards program of your own.

## April shares three ways to use gamification to increase member engagement:



**1** **Start by defining your members.** April recommends clearly mapping your members to an engagement framework before you start any gamification program. By charting your member types against your desired behaviors you can identify what recognition and reward programs are created organically, and what you'll need to create on your own.

**2** **Set clear expectations.** "Make clear, clear asks of your members, and provide even clearer ways to hold them accountable. We want them to be really happy with the results, and we want to be really happy with the results." April has found this helps keep members even more engaged since they already know the outcomes for different behaviors.

**3** **Ask your members what is important to them.** Not every program type will resonate with every community — and that's OK! "One of the most successful programs we run came out of a community steering committee. Members came in and said, 'This is what we want.' Getting their advice is the biggest piece of help we can get."

# LISA TALLMAN

VP, Data and Information Management; Easterseals

## ON BUILDING COMMUNITY TEAMS



**Always start with strategy. Here's where we are and here's where we want to be. Do we have the right people to get us there? What skills do we need to succeed?**



**Use Case: Affiliate Community**

**Platform: SharePoint/Teams**

**Years in Community: 15+**

**Lisa Tallman builds community at Easterseals for 26 national affiliates. Starting as a team of one, she approached team building from a strategic angle.**

"I always have a business case for my community programs that I update annually. And one thing I always include is headcount. 'Here's what my current team is doing. Here's how much time and effort it's taking them to do that, and here's what's not getting done because we don't have the resources.' By showing my executives what we need to fulfill the strategic plan, I can tie community goals back into organizational goals."

You are the community expert and you need to ask for what your community needs to succeed.

"I've never been afraid, at budget time, to ask for what I've wanted and needed. I knew some years it wasn't gonna happen, it wasn't a priority. But I still had the business case ready, and I still ask for what I need. It's critical that leadership sees it's not that there's not a need here — there's always a need here."

Lisa recommends crafting a community strategy aligned with the organization's goals, and clearly providing value back to the organization. "Management is going to ask, 'Why do you need headcount?', so be prepared to articulate the value new hires will provide to both the community program and the organization."

**Another strategic way to extend your community team? Borrow internal talent.**

"I've done a good job building relationships. There are other people in your organization who get what you do, but they may be in a different department. Reach out to them and say, 'Hey, can you do a project for me? Do you think your boss would allow you help with this?' As long as their boss says yes, then you've got yourself another resource to get something done."

Lisa often borrows people on a project basis, and sometimes those relationships can lead into full-time headcount.

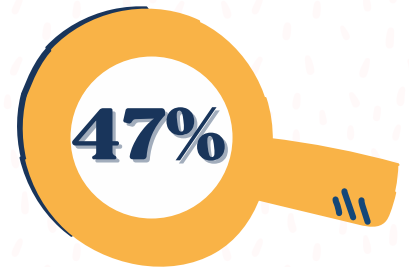
"Companies restructure and changes happen. Building relationships throughout the organization has been extremely helpful in attracting the people I've needed over time."



In our State of Community Management research, we found that 47% of community roles are defined by HR teams, who might not always understand what your community team needs to succeed.

Help them help you by providing a detailed look at what common community skills are, where your current team (even if that's just you) excels, and what gaps need to be filled for future success.

You can use our [Community Skills Framework™](#) to provide your HR team with a look at industry-standard terms and skills.



**47%**  
of community roles  
are defined by Human  
Resources.



## Lisa shares three tips for building your community team:

# 1

**Hire the right mindset.** Many skills can be learned, but a relationship and opportunity-seeking orientation is difficult to develop. Consider the personalities and working styles on your current team, and make diversifying beyond your skillset a priority.

# 2

**Think about the future, not just the present.** Use Lisa's tactic of considering the long-term strategic goals for your community program when hiring. This will help your team scale as programs grow, and provide growth opportunities in line with your team structure.

# 3

**Community management is hot right now.** Community teams are growing faster than the availability of experienced professionals. As you consider potential hires, remember there's no one community unicorn out there for you. Hire with the expectation that training can close gaps.

# JAIME LEE BUNTON

SENIOR COMMUNITY MANAGER; PTC SOFTWARE

## ON STAKEHOLDER SUPPORT



**Treat your stakeholders as your own personal community.**

**Use Case:** *Customer Community*

**Platform:** *Khoros*

**Years in Community:** *10*

**Ready for a pop quiz? Who makes up your community?**

**Members. Users. Employees. Customers. Jaime Lee Bunton adds one more distinct segment: Stakeholders.**

After a decade in the community industry, Jaime Lee has adopted "treat your stakeholders as your own personal community" as her strategy for building positive relationships with executives and other community stakeholders throughout her organization.

Jaime Lee focuses on building long-term relationships with cross-functional stakeholders and their teams long before she may need their support.

"I like to bring everyone working on different community projects together to share a Community Update."

**By inviting contributors to a quarterly status update, Jaime Lee highlights their contributions, and showcases the community work for their teams and executives.**

"I send an invite to all of their vice-presidents, positioning it as 'your people — your direct reports — are engaged in this community. You should be aware of the benefits the community is bringing to the organization, too.'"

Through those regular meetings, Jaime Lee was able to proactively engage the executives involved into thinking of a bigger vision of community, and start planting their own community seeds.

**Another tactic for building strong relationships with her stakeholder community? Show them the numbers.**

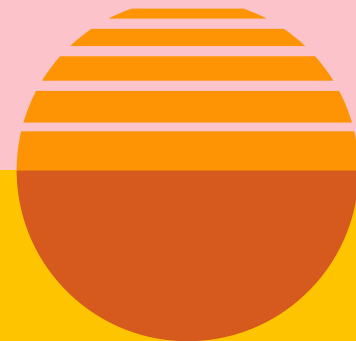
"As community professionals, we understand your community goal is to feel nurtured, but from a business standpoint it's important to know what community brings to the bottom line of the business."

Her only regret? "I wouldn't have waited so long to get ahead of the return on investment story! I spent all my time putting out fires, which was necessary, but it's so critical to gain executive support."

On a short-staffed team, Jaime Lee's platform vendor helped out. At their annual strategic business review, their vendor shared an executive overview of what the community was doing, providing the community ROI, and industry benchmarks. "We showed them that with the tools to be successful, we could make community successful for the organization as a whole."

# BUILDING

# STAKEHOLDER SUPPORT



**83%** of executives have a positive perception of community potential



Community programs worldwide are experiencing a surge of stakeholder support. Today, executives have an overwhelmingly positive perception of community approaches.

Thanks in large part to the visibility of online communities driven by the COVID-19 pandemic, 83% of executives have a positive perception of community potential — and this translates to increased engagement and support at the executive level.

## Jaime Lee's recommendations for building stakeholder support:



**1**

**Build relationships before you need them.** The first time you meet someone is not the best time to ask for a favor. By cultivating cross-functional relationships throughout her organization when she started her job, Jaime Lee had a much wider base of support for community initiatives later on.

**2**

**Let your numbers tell your story.** "It is critical to have [your community ROI] in your back pocket. You can shout from the mountaintops about the importance of nurturing and engagement, but you need to show executives how the community is helping the bottom line."

**3**

**Start small.** Getting stakeholders excited about community isn't going to happen overnight. Start with meet and greets — short, informational meetings where you share how the community can help their team, and get their feedback. From there you can work up to regular touchpoint, reporting, and shared responsibilities.

# DEBBIE KWAN

Internal Digital Lead; Canadian Partnership Against Cancer

## ON COMMUNITY MIGRATIONS



“It was really helpful to know what problem we were focusing on...you can only do so much.”

*Use Case: Employee Community*

*Platform: Microsoft*

*Years in Community: 6*

**How would you react to the news you were migrating community platforms? Debbie Kwan was surprised, but relieved once she heard they were leaving their legacy platform behind for a full Microsoft integration.**

"We did discovery work with the internal communities and found a lot of usability issues." Migrating to a new platform would not just streamline the user experience, it would also resolve a number of known issues.

**Their number one community challenge? Discoverability!** "The biggest issue was that information was extremely hard to find. Things weren't organized."

Another hurdle? An extremely condensed timeframe. Just five months to manage the migration.

**Debbie viewed the timeline as an asset, not a barrier.**

"[The timeline] was really helpful to have to focus. With such a limited time, you can only do so much. We knew it just wasn't possible to do everything we wanted to do."

Having already defined content and search issues as their number one issues, Debbie found it easy to prioritize the migration.

"We prioritized designing new information architecture, auditing content, an easy to use search function, and ensuring we had proper governance in place."

**Even with the time crunch, Debbie made sure they were incorporating user input.** By using member advisory groups, they ensured they were designing for real world problems.

"When you're on the project team, you can get lost in the technical side of things. Those touch points with the advisory groups were a good reality check."

Debbie credits the in-depth research they did into the current state of the community for their ability to complete the migration so quickly.

"It's important to do the current state analysis of the existing [community]. If there isn't an existing one, it's still important to do user research!"

What could have been a stressful transition turned out to be an interesting learning experience for Debbie. "This was a challenging-but-in-a-fun-way project, because I was able to figure out how to help people achieve what they need to do."

# COMMUNITY MIGRATIONS



A community migration isn't just moving content, data, profiles, and programming over to a new platform. It's moving your members over, too.

In the migration communication process, focus on the specific differences between the platforms. Be very transparent with what features and functionalities might be lost in the new community.

Be prepared for some people to resist change, and affirm that it's OK for them to feel that way. Make it clear you're always looking to improve the community experience, and you're willing to listen to constructive feedback. Providing clear feedback channels can help members feel seen and heard.

## Debbie's advice for a smooth platform migration:



- 1** **It's never too early to get members involved.** Debbie recommends getting your internal teams involved in a migration as soon as possible. "It was really important for us to involve staff members right from the beginning. They provide feedback on pain points, wish lists, and how we could help them be more productive and engaged."
- 2** **Not all feedback is created equally.** It's just a fact of life: Some people like to complain. But when someone who doesn't usually voice an opinion offers critical feedback, it's time to take notes. If something is important enough to have a normally quiet voice speak out, it's definitely worth reviewing.
- 3** **Define what success looks like.** One thing Debbie regrets was not having more quantitative metrics to benchmark the new community against. We recommend allowing community members an opportunity to use the new platform, and then give their constructive feedback via survey to provide quantifiable information prior to the launch.

# CLAUDIA TEIXEIRA

Senior Knowledge and Learning Consultant; The World Bank Group

## ON CENTERS OF EXCELLENCE



Invest in studying your communities, understanding what the challenges are, and designing content specifically for them.



**Use Case:** Center of Excellence

**Platform:** Teams, Sharepoint & Yammer

**Years in Community:** 8

**Do you have a central place in your organization that provides support, guidance, or education for communities of practice? If so, you already have a center of excellence (CoE). If you're like the World Bank Group, you just call it something else.**

"We didn't recognize we were a center of excellence, even though we were doing a lot to help our communities of practice become their best."

CoEs provide central support to connect all the communities in an organization. This helps ensure a common, standardized approach to community building.

**The World Bank Group has been supporting communities of practice since the 1990s, so formalizing CoEs was an organic next step.**

"All the departments in the World Bank Group already support communities of practice, they're part of the culture of how people work and develop relationships, both with colleagues and with clients. But the question was, 'How do we develop a center of excellence?'"

Claudia and her community team took a three-pronged approach focused on community training, a dedicated community lab program, and heavily investing in content development.

**Playbooks and toolkits provide the foundation of a sustainable CoE.**

"We have a playbook, *Community Building: A Primer*, which is a comprehensive guide on how to develop a community from point zero to launch."

The *World Bank Group Community Toolkit* features content available in the *Primer*, but packaged in way users can easily focus on their particular stage or use type. *The Community Toolkit* is full of templates, advice, and practical resources to help with the tactical side of launching a community inside The World Bank Group.

Whether you're just starting to build a CoE, or formalizing existing internal consulting initiatives into a more comprehensive program, Claudia recommends two things.

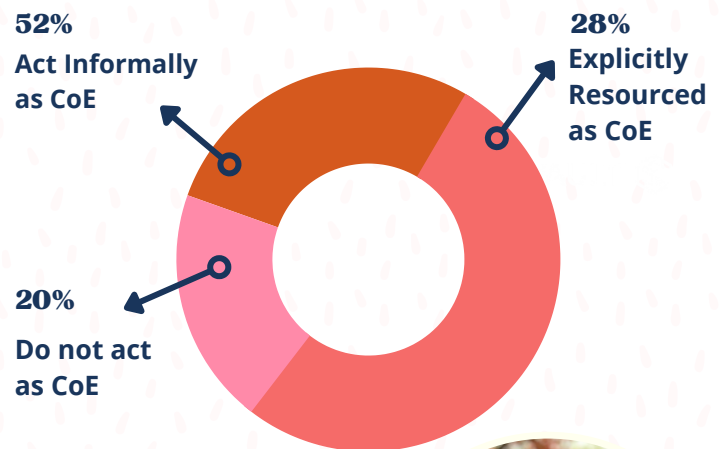
"First, listen deeply to your stakeholders, so you can respond to the specific demands of your organization. Second, invest in a routine. A center of excellence is only as good as the team running it. Everything we accomplished, we accomplished because we had a great team."

# CENTERS OF EXCELLENCE

At many organizations, community program management is becoming the primary model of all community management, and these teams are being asked to enable their organization's community journey on top of managing their specific programs.

Currently, 28% of all community programs are explicitly resourced as Centers of Excellence, but an additional 52% say they informally act as CoE, by helping enable community management throughout their organizations.

## Community Programs Acting as a Center of Excellence



## Claudia's three tips for rolling out a Center of Excellence at your organization:



# 1

**Start with a playbook.** A community playbook is a smart way to ensure everyone at your organization is thinking about community in the same way, using standard language, and benchmarks. A playbook might include community management definitions, moderation guidelines, and tools/channels for specific use cases.

# 2

**Community training isn't just for community managers.** As community ideas become more common at your organization, you'll find the scope of your training and support may need to broaden. "Many people joining our Community Management Certification aren't actually community managers, but they're interested in learning how to design or manage a community in an effective way."

# 3

**Iterate, iterate, iterate.** At any organization, a CoE will be a living initiative — don't be afraid of change. Plan for regular reviews and content updates, including a wide array of feedback sources to provide more perspective, context, and ideas. Claudia encourages creating "space for everybody to thrive and come in with new ideas, innovate, and take risks."

# SARAH RAPP

Director, Alumni & People Engagement at JA Worldwide

## ON AMBASSADOR PROGRAMS



Everyone wants big numbers, but you need the core people who really want to work on it.

*Use Case: Alumni Community*

*Platform: Hivebrite*

*Years in Community: 13*

**JA Worldwide is a global NGO offering programs on financial literacy, work readiness, and entrepreneurship in more than 115 locations. With a huge network of alumni to connect with, Sarah Rapp is focused on leading their global alumni networks.**

The ambassador program is the cornerstone of their alumni community. "We really want to empower the younger alumni to take leadership roles, creating a community that is for alumni, by alumni."

In the spirit of the JA Worldwide mission, Sarah encourages alumni members to learn by doing inside the network.

**First, Sarah and her team identify "firestarters" from their most passionate alumni.**

In each of the 115 locations, two - three of these active alumni "firestarters" form Alumni Boards.

Using a starter kit packed with best practices from different global locations, each Alumni Board works with their local JA Worldwide staff to build their specific alumni network.

**While the Alumni Boards were building strong local network through mentoring and live event, COVID presented a challenge.**

"People are always super motivated until life hits with whatever comes their way." Sarah found that during the pandemic many people dropped their voluntary responsibilities, so finding ways to keep them engaged was critical.

Another challenge was knowledge transfer. With the built-in turnover for Alumni Boards, there would always be people leaving roles, so capturing that knowledge to transfer to the next generation of leaders was important.

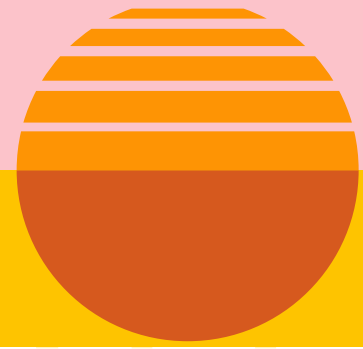
By formalizing title and roles, and working together with local offices, Sarah can scale the work that individual Alumni Boards have accomplished.

**Next up: connecting decades of global alumni.**

Using Hivebrite as the infrastructure for their global program, Sarah has her sights set on creating a network for the last 102 years of alumni, "creating a experienced, expansive network, where people can come back, donate, and get involved in the whole JA ecosystem."



# AMBASSADOR PROGRAMS



Only 41% of communities leverage members to produce or facilitate community programs.



Alumni networks aren't just for colleges and universities. Dedicated alumni networks can connect passionate groups of program graduates, corporate alumni, and enthusiasts groups like summer campers.

Leveraging your passionate audience to do meaningful community work both strengthens ties with them, and also helps you scale your community reach.

Using dedicated resources like playbooks and quick start guides helps you empower members to create programs and content that encourages more alumni participation, enabling a positive cycle of engagement.



## Tips for a Successful Community Ambassador Programs from Sarah:

- 1 Start small.** Sarah encourages anyone building an ambassador program to start with a small group of very motivated people, instead of focusing on big numbers. The right group of core people who really want to work on the program and are really engaged will help ensure long-term success.
- 2 Think about what motivates your ambassadors.** As with any volunteer-run program, motivating and reward your ambassadors is really important. Sarah thought about what incentives their ambassador audience - mostly 16-18 year-olds would find compelling and provided them with things like recognition, work experience, and the chance to add "Alumni Network Community Manager" to their resumes.
- 3 Be patient.** "We all want to go faster and higher but it takes time, especially if it's volunteer-led. Give the people time and be patient with the outcome. It just takes a bit more time than if you have to pay someone!" Differentiating project timelines between staff and volunteer contributions will help set reasonable expectations for growth and engagement.

# TRACY MAURER

Senior Manager, Community and Knowledge Management; Commvault

## ON ADVOCACY PROGRAMS



I love seeing people who are more introverted or who don't speak up in meetings posting in the community. The real value is the human connections that advocates empower.



**Use Case: Employee Community**

**Platform: Jive-N**

**Years in Community: 12**

In 2019, Tracy Maurer inadvertently became a team of one, and quickly realized the existing community programs at Commvault couldn't maintain their status quo sustainably.

### **Enter: Community advocacy programs.**

By identifying a few users who expressed enthusiasm in the community, Tracy handpicked her first community advocates.

Tracy focused on finding users who didn't traditionally fit into the "superuser" category, but instead looked at people who understood the purpose of the community and its benefits.

"I tried to make sure different departments were represented; it was important to include a variety of areas of the business."

### **With a global workforce, meeting times are a challenge.**

Tracy encourages asynchronous participation, always providing recorded sessions, and using the community itself to engage with her advocates.

Since all of Tracy's advocates are employees, she also faces the challenge of balancing their contributions alongside their day-to-day workloads.

"I don't ever want to put my advocates in the position of getting in trouble or defending what they're doing with their teams. I want it to be really obvious what the ask is and be out in the open."

To get ahead of this potential roadblock, Tracy always reaches out to a potential advocate's manager to provide details about the commitment.

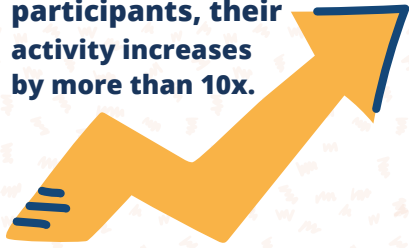
### **Her advice? Articulate what being an advocate in your community entails. What tasks are involved, and what is the expected time commitment?**

Using badges, endorsements, and even chocolate, Tracy makes sure advocates feel valued and recognized for their contributions. Another important output? An annual summary of the community initiatives advocates had a direct part in making happen.

"I wanted to provide a tangible record of what the advocates contribute to, both for their personal satisfaction, but also so they can take it back to their manager and say, 'Hey, look! I helped create this impact!' Showing advocates their value is the biggest way I can thank them."

# BUILDING EFFECTIVE ADVOCACY PROGRAMS

**When members shift from passive recipients of information to active participants, their activity increases by more than 10x.**



No matter what you call them, community advocates programs have a measurable impact on the health and success of your community.

Our State of Community Management research shows when a member of a community shifts from a passive recipient of information to an active participant, their activity increases by more than 10x. Their ROI — the return they get for the time they invest — increases by more than 200%!

## Tracy's three ways you can set yourself up for success when starting a community advocacy program:



**1** **Make sure you can commit time to the launch and ongoing maintenance of a program.** One of the things Tracy has learned is the importance of putting regular time for an advocacy program on your calendar. Set up standing time on your own calendar, and use that dedicated time to think about the program, how you're engaging your advocates, and do some regular outreach to your advocates.

**2** **Before you start? Research, plan, then research some more.** Decide what the structure of your program will be. What will you call your advocates? How will you communicate with them, and what tasks or activities are they expected to perform? By deciding on the minute details before you start recruiting advocates, you ensure you're setting reasonable expectations, which will serve as the foundation for the program.

**3** **Keep in touch with your advocates.** It's important to make sure you have regular touchpoints with your advocates to ensure they don't feel like, "Well, I signed up for this. I wonder what's going on." Keeping your advocates updated on a regular cadence encourages their ongoing engagement, and confirms you appreciate their time and commitment.

# JANET STILES

SR. DIRECTOR OF MEMBER ENGAGEMENT; AAMC

## ON UNCLOGGING BOTTLENECKS



Now our communities allow our constituents to really connect with each other.

*Use Case: Association Community*

*Platform: Higher Logic*

*Years in Community: 8*

**When Janet Stiles started her role at the Association of American Medical Colleges (AAMC) she was excited to learn what their community programs looked like. Unfortunately, there wasn't just one place to look.**

"Everyone was doing their own thing. Five software platforms, different people running different programs, and different audiences participating on each." There was no central, unifying vision for community.

With no champion for community at AAMC, it was more than just disorganized — it was creating bottlenecks. Their constituents were on the same page.

"We surveyed our customers, and they were very interested in virtual communities.

"They were saying, 'We want you [AAMC] to get out of the way; we want to talk to each other!'"

**Having stood up a community program at a smaller association, Janet started the conversation with her boss and other senior leaders in digital communications.**

"I was the only person who had stood up community someplace else. We had people who were interested, but they didn't have any practical experience."

**Working with a core team of community "Pioneers," Janet began to explore community options for AAMC.**

"We rolled up our sleeves and did it together. We created a playbook, documentation, intake forms, and guidelines."

**Today, AAMC's community is thriving.**

"I see so many connections happening. Somebody who's more experienced as a community manager shares ideas with someone who's newer. Someone with a great editorial calendar, or a new on-boarding practice shares. We're starting to see connections take place."

The unified community strategy at AAMC is solving interdepartmental challenges, connecting a dispersed workforce, even sharing ideas for now remote Match Days for newly accepted medical school students.

"Our communities are saving us time by allowing our members to reference libraries of shared resources. So many things we couldn't do before the community was here."

# UNCLOGGING BOTTLENECKS



In an increasingly networked world, members expect answers to their questions in near-real time. If they can't find the information they need NOW, they may abandon their search, or move to their social networks to voice their frustrations.

Moving documentation, support, and FAQs to an online community allows people to find the answers they need, when they need them. Providing a centralized location for people to find information, ask questions, and get the support of their peers and your organization has been shown to reduce the number of new support requests, and makes clients more willing to contribute and collaborate online.

## Janet shares three ways community can unclog bottlenecks at your organization:



# 1

**Community empowers collaboration.** "Recently, there was a call for abstracts and someone said, 'Does anybody want to work with me on a submission?' And all of sudden all these folks wanted to work together. That wouldn't have happened without community."

# 2

**Community surfaces organization-wide challenges.** "One person posted an issue they were facing, and there was this whole chatter around, 'Yes, I'm having that same problem!' This would have never happened if it was just over email. We were able to find the right person internally to help find the answer. We wouldn't have recognized it was a pain point for so many people if not for the community."

# 3

**Community overcomes pandemic-related set-backs.** "Match Day is the day medical students find out where they're going for residency, and pre-COVID there were always big celebrations. We created online resources so different schools could share how they were handling non-traditional celebrations, and document ways to celebrate students so other schools could get new ideas and save time."

# MELANIE BINDER

Community Manager; Healthcare Finance Management Association

## ON PROFESSIONAL DEVELOPMENT



**For any community manager: Take any type of [learning] opportunity you can find! You'll build a network that can stay with you throughout your career**



*Use Case: Association Community*

*Platform: Verint*

*Years in Community: 10*

**Melanie Binder spent over a decade as an online community professional, cultivating a strong network of community peers and mentors. But her support system looked very different when she started.**

"I didn't have a strong network of people with similar jobs in the beginning. It was a bit of trial by fire, using my background and experience, and what I felt was the right thing to do versus using resources. I didn't have a lot of resources — didn't know they were available."

**Unsurprisingly, Melanie found her community people online.**

She enrolled in a fellowship program for online community managers in science-related fields, and found resources and peers inside TheCR Network.

"I think community managers are natural networkers — building a network — but you also need a network of support for yourself as a new community manager. For me, it was just trying to find that network."

**Another challenge? Being the community manager for a scientific community without having a background in the sciences.**

"I definitely dealt with some skepticism early on. Colleagues would ask, 'How can you build a community for scientists when that isn't your background?' Then I found The Community Skills Framework, [which shows] the skills you need to be a successful community manager, and that don't necessarily have anything to do with the industry you're working in."

Melanie encourages a more holistic approach to evaluating the types of skills that will be valuable to your organization's community programs when bringing in new community talent.

"To succeed, you need business skills, marketing skills, networking skills, and technical skills, along with knowledge of your industry, which can always grow. It's important to not just have a knowledge expert in [your specific] industry, but also a knowledge expert at being a community manager."

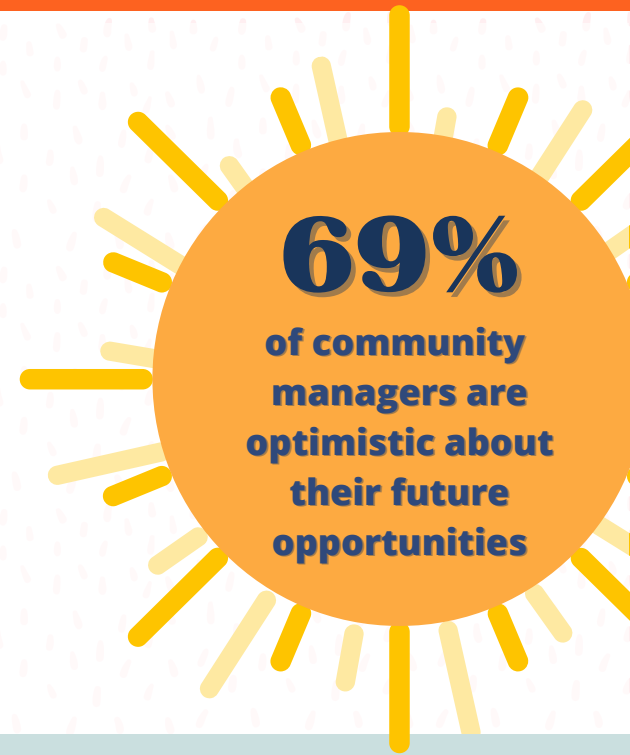
**The best news? The community world is a lot bigger today than it was when Melanie started.**

"There's a lot more information available now. First, build that professional network, so we can learn from each other."

# PROFESSIONAL DEVELOPMENT

Community management has gone from a strategic afterthought to a must-have role at many organizations. The future looks even brighter: 69% of community professionals are optimistic about their future in the field of community leadership — and 80% are optimistic about the future of online community at their organization.

If you feel as though there is no clear career path forward in community at your organization, take this as an opportunity to provide guidance to your manager and human resources teams on what a community career path might look like.



## Melanie's advice for crafting a career in community management:

- 1 Set clear expectations.** To grow professionally, it's important to set clear boundaries and expectations around your role. Melanie explains, "Setting the expectations of what the community manager does, or doesn't do, is critical. There's a misconception that community managers are just moderators, but we're so much more than that."
- 2 Look for opportunities internally.** Melanie started her community career in member services, before she knew community management was a career path. After seeing a project to develop a community, she was intrigued, "The more I explored that community option, the more I felt it was a good path, and a good combination of the skills I had from previous jobs."
- 3 Your career is a marathon, not a sprint.** When we talk about launching a community, we always say it's not a sprint, it's a marathon, and your career is the same way. Lay the seeds and nurture it with networking, education, curiosity, and professional development.

# PADRAIC RYAN

Community Manager; eCommerceFuel

## ON ENGAGEMENT



**Our community is really about giving back and we don't really tolerate people who don't.**



*Use Case: Community of Practice*

*Platform: Discourse*

*Years in Community: 3*

**Padraic Ryan has a superpower when it comes to knowing how eCommerceFuel members want to engage in their online community. He *was* a member of the online community.**

Hands-on onboarding is the first of their proven engagement tactics.

"We try to be really personal with our members when we bring them on and throughout their whole journey in the community."

Through highly personalized outreach, the eCommerceFuel community team only onboards 5-10 new members a week. With tools like welcome emails, videos, a new member staging area, and dedicated Community guides, the new members are able to effectively participate in the community soon after they finish onboarding.

**Great content and programs encourage members to engage.**

"We use customized email flows and notifications that are tied to [member's] skills and preferences so they don't get a lot of garbage — they always get something catered toward them."

This customized approach works — about 85% of members log in at least once every 90 days. It wasn't always this way, though.

**"No one reads email anymore."**

You're probably nodding your head in agreement. Padraic found this to be a big challenge in getting members involved in the community.

"It was tough for [new members] to feel like they belonged, but when they see a face with a name

and a person who really is paying attention to them, that feels really great!"

**By using deep personalization and encouraging engagement right from the start, Padraic made sure members felt like they weren't wasting their time.**

"Giving people value for their time is what it's all about"

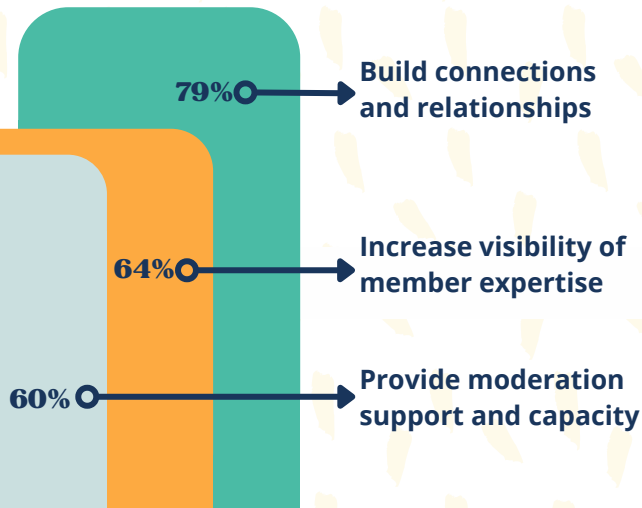
Padraic and his team continue to innovate what engagement means for their community to keep their member involvement high.

"Video is in our future, that TikTok format — so all the attention spans that are 10 seconds [long] will actually pay attention to what we're trying to tell them, and continue to find value in our community."



# ENGAGEMENT

## How do community advocates contribute to community programs?



Advocates can be a powerful force in your online community program. One of the most consistent responses in our annual research is that community managers need more resources — and 75% of community managers report they already use engaged community members to help with everything from moderation to mentoring to engagement boosting activities.

If you're in the 25% of community programs that don't currently leverage your community members as internal advocates, it's time to get started!

## Three ways Padraic found to engage your community advocates, boost engagement:



- 1 Make it worth their time.** "Our community guides, experts, and moderators all get free memberships, and they get discounted tickets to our live events." By rewarding your advocates with what matters to them (and this will differ based on your use type and engagement profiles) you can make sure they feel valued.
- 2 Communicate their roles clearly.** Padraic has identified specific actions for their community guides, ensuring they know how to contribute and when. "Our Community Guides welcome the new members, give them answers to their questions and problems, and point them in the right direction."
- 3 Curate the leaders you need.** By using subject-matter experts, Padraic makes sure members have access to expertise not on their community team. "When there's a question about legal we have a lawyer there to answer their questions — or question about marketing, we have a marketing expert. We try to curate almost everything in our community, so people get exactly what they're after."

# ALEX BLANTON

PROGRAM MANAGER, OFFICE OF THE CTO; MICROSOFT

## ON VIRTUAL EVENTS



**Going virtual forces you to think about new ways of delivering the kind of content you want to give to your audience.**



*Use Case: Communities of Practice*

*Platform: Microsoft*

*Years in Community: 12*

**In the Spring of 2020, Alex Blanton was faced with the same dilemma as so many community builders: "Looks like our annual event won't happen in person."**

Alex started planning events at Microsoft in 2010, and he has significant experience building online experiences for employees who weren't onsite in the Redmond, WA headquarters. "When I started managing the machine learning community in 2014, about half of our membership was outside Redmond. So we did 50% of our events in person and 50% virtually."

When challenged to move their annual Machine Learning, AI, and Data Science Conference in 2020, he realized what a different undertaking it would be.

**Historically, the event was an in-person event, although they did record and stream sessions for those unable to attend.**

Alex realized to take the event fully online, they had to create ways for the audience to interact with each other, and with the speakers.

"When we decided to go online, [I] researched and reviewed available tools to put on a multi-day, multi-track conference with concurrent sessions."

Alex decided to go with a solution employees were already familiar with – Microsoft Teams.

**Another challenge? Scheduling a cohesive event for thousands of people, around the world.**

"At a live event, you spend all day there. People fly in and drop into...

sessions they might not even know about ahead of time. With the online event, they pick and choose which sessions to attend, and they balance that with their daily work."

**A silver lining of rethinking the annual event? A chance to refocus.**

"When you host an event multiple times, you start to lose focus on the original goals. Going all-virtual forced us refocus on objectives."

Alex is excited about the future of hybrid events. "There's different kinds of content you can use in these online and hybrid events, like VR-based sessions, keynoters from anywhere in the world, related on-demand content, and bird-of-a-feather discussions online to bring together people regardless of geography."

# VIRTUAL EVENTS

What's one important thing to consider as you move to virtual or hybrid events? "One of the things I found out when we went online is people don't really read the session descriptions."

"With virtual sessions, it seems like people make more assumptions without reading the descriptions. For example, we published self-paced labs and hosted Q&A sessions with the lab creators, but people showed up to the online sessions expecting to be taught the lab from the ground up, which would have been impossible in a virtual format."

One recommendation is to include the event type right at the front of the session title. "Overall, we learned that we have to be super-explicit in session titles and descriptions when putting on a virtual event."



## Alex's three tips for managing virtual events:

1

**Make it easy for members to attend.** Your #1 goal should be providing the content members want, in a way that's easy for them to access. "Bells and whistles and cool features are great, but not if they prevent people from just easily getting into the session, and experiencing what they want."

2

**Have a plan B, and plan C.** "Reliability is really important. If your tool goes down in the middle of the conference, it's so much worse than things happening in person. People don't know what's going on." It's helpful to have communicated what will happen in case of a tech failure before the event, so people know to check their email or a specific channel online to reconnect or catch up on content.

3

**Trust matters.** "I think one reason that "intention to attend again" didn't suffer (either in a survey or in the actual attendance at the next event) was because we had built up trust with our community over the years and even though the initial online-only event was bumpy, they trusted us to try to make the next one better."

# ANNE MBUGUA

Community Management Fellow; The Community Roundtable

## ON CREATING MEANINGFUL CONTENT



**Community is not a solo sport. Co-creating and co-learning is an important thing.**



*Use Case: Community of Practice*

*Platform: Higher Logic*

*Years in Community: <1*

**When we decided one-on-one interviews were the way to go for the new edition of our Handbook, Anne Mbugua jumped right in.**

"When I was tasked with the project, my initial thought was, 'It would be lovely to have a theme I can use as part of coming up with different questions to help inspire content.'"

Together with the project team, Anne focused her interviews on questions related to foundations of community management, including everything from getting started to growing a team.

**With a framework of questions in place, outreach began.**

"One of the challenges was that email can get lost in your inbox, and there's definitely a timeline for this project!"

Faced with connecting with the global membership of TheCR Network, Anne used community tactics to communicate with with potential guests.

"I started reaching out to them through their socials, in the Network, and on our Slack instance, and I found that that sparked interest and was noticed more quickly."

**One consideration when planning her content approach was how to create the most value out of these interviews.**

Anne didn't want to spend her energy, and valuable time with busy Network members, just to create one output. "I focused on evergreen topics and questions. I wanted to make sure the content can also be used in a podcast, in a blog post, in a video – really extending its life."

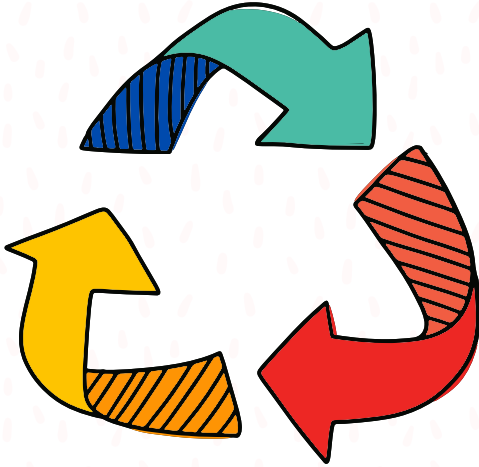
**Anne's thoughtful approach to content creation led to unexpected benefits.**

"The project created relationships and connections between myself and the community managers. It also led them to stop and think through the questions, the challenges they've faced, and lessons they learned."

Many of the topics covered in this Handbook led to more in-depth discussion in the Network, as participants wanted to reflect and share out loud.

**Anne's biggest takeaway was the immense value of co-creating content.**

"Use content creation to build relationships, connections, and help members to engage with each other."



Creating meaningful content for your online community doesn't have to break the bank – or your back. Look for evergreen content opportunities that you can reuse and recycle.

Did someone lead a webinar? Post the recording in full, and then edit it into clips you can feature as standalone videos, use as the basis for blog post content and in newsletters, or on social. When you're creating new content think about ways you'll be able to reuse it at key moments/events, or use repeatedly to scale your reach and save time.

## Anne's advice for creating meaningful content in your community program:



# 1

**Have a specific and consistent ask.** Anne found that creating a strict framework for the content helped keep the project cohesive, and provided helpful guide rails for participants. "Coming up with four good questions can really help define what kind of content you're trying to create, and also guide the person you're interviewing to really think through them."

# 2

**Use your community in the creation process.** Email was top of mind for Anne, but didn't yield results. Don't be afraid to approach your members in your community. "Emails messages can just sit there and go unnoticed." Connecting with members with more real-time tools like community messaging or Slack DMs were a much fruitful outreach method for Anne.

# 3

**Co-creation leads to a lot more than just content.** Arguably, the biggest output from Anne's Handbook project isn't the Handbook itself. "I built relationships and made connections that helped to further discussions. Now I'm able to spark the conversation somewhere else [with a member], because we already created that relationship."

## The Community Wayback Machine

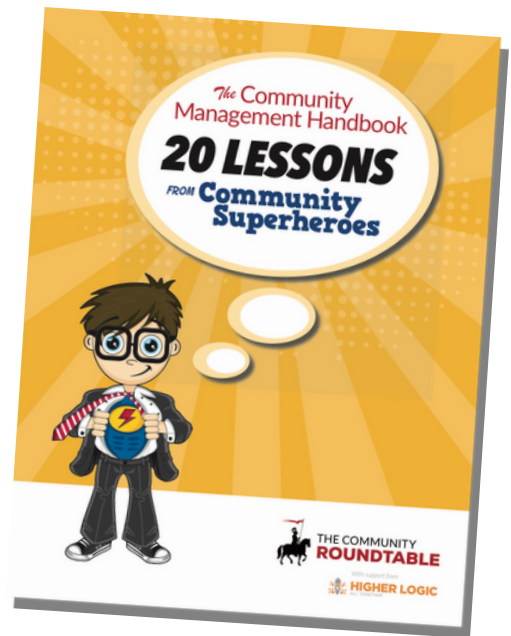
Hop in our Community Wayback Machine as we check-in with some of the professionals profiled in the 2015 edition of the Community Manager Handbook.

Picture it: The year is 2015. *Hamilton* just opened on Broadway. Sterling Cooper shut its doors forever. The Golden State Warriors broke a 40-year drought. Also: We published our first Community Manager Handbook.

Featuring advice and ideas from 20 community leaders, the Handbook connected with an audience of community managers around the world.

But — a lot has changed in the community world since 2015. Vendors have come and gone. The career path for community professionals has expanded and diversified. And Accessibility and Diversity are critical elements of successful online community programs.

Join us as we check in with four of our original Handbook contributors to see where they are today, and how their advice has held up.



**ALEX BLANTON**

Program Manager, Office of the CTO; Microsoft  
*Internal Consulting*



**HILLARY BOUCHER**

Associate Manager, Community; UKG



**MATT BROWN**

Founder & Chief Community Officer; ComSolve



**MARIA OGNEVA**

Director of Community and Customer Marketing; Invoca



# COMMUNITY WAYBACK MACHINE

## Internal Consulting

### ALEX BLANTON

Program Manager, Office of the CTO;  
Microsoft

"Since 2015, I continually consult with people, even though it's not formally part of my job. It feels like the right thing to do."

Looking back, Alex admits — he had some pretty good advice. "We've made basically one edit [to the Community Jumpstart toolkit] but literally, it's the same thing today: Eight simple steps aligned with The Community Roundtable's Community Maturity Model."

He's found the Jumpstart Toolkit resonates with people in two different ways. Sometimes people are thrilled to have a checklist of community to-dos that they may not have thought of. Others see the toolkit and think, "Oh, we're already doing these things — we're on the right track!"

Advice he'd add for those doing internal consulting work now? "Circle back with the communities you talked to. Which recommendations did you put into place? Did how did you track whether they were successful?"

By connecting with the communities you've worked with, you can learn a lot about whether your advice was good, what worked, and what didn't work, allowing you to fine-tune your recommendations going forward.

His final reflection? "A lot of times people still think of community as a platform, and platform is important. But who are the people in your community? Because that's your actual community."



[DOWNLOAD THE 2015 EDITION](#)



# COMMUNITY WAYBACK MACHINE

## Member-Led Content

“There is no better testimonial than someone saying, "I want to tell you how much I like using this thing."”

### HILLARY BOUCHER

Associate Manager, Community; UKG

When Hillary reviewed her 2015 advice, she gave past-Hillary a pat on the back.

"Having mapped out a strategic approach sooner than later? That still holds up!"

Hillary is a big fan of being strategic and taking a step back. She (still recommends) asking yourself, "What are we doing? How does it align to our larger program objectives? With our larger company objectives?"

That doesn't mean she recommends a completely planned-out approach. "I'm a big fan of experimentation, throwing spaghetti at the wall, but the spaghetti needs to align with what we're doing in a bigger way!"

While Hillary is still a fan of member-led content, she thinks about it differently now that she works at a large organization.

"I went from working in a community that had about 300 members to one that has over 50,000 members. I've learned there are groups and teams across your organization who may already be running member-focused engagement programs, but they might not see them as community programs." Seek out those people, and those programs that already exist, and bring them into the community fold.



[DOWNLOAD THE 2015 EDITION](#)





# COMMUNITY WAYBACK MACHINE

## Advocacy Programs

Your community is a powerful resource for your organization. Cultivate that knowledge with executives.

### MATT BROWN

Founder & Chief Community Officer;  
ComSolve

"The biggest surprise is [that this advice is] still very, very relative."

Matt still believes you should never come into a community with preconceived notions, and that every community is going to require different things. Always go back to your community and ask them as your sounding board."

Matt encourages community managers to connect with their advocates frequently to build an authentic relationship. "Community participants need to feel like their voices are being heard. When they see you do that, then they're all the more invested. And that's critical."

Get advocates involved in the program design and operations. Advocacy doesn't just have to be super-users. Think about how you can leverage the strengths of your advocates to provide mutual benefits.

Matt has learned that scalability is important when designing effective advocacy programs. Think about the advocate life-cycle to ensure that the program provides value, and allows it to grow and remain vital to both your organization and your community advocates.

Matt's final advice for his old self (and you!): "It's better to listen and not suppose you've got all the answers."



DOWNLOAD THE 2015 EDITION



# COMMUNITY WAYBACK MACHINE

## Selecting a Community Solution

“It's well worth your time to slow down and be very methodical, be very open-minded, and honor other people's contributions.”

### MARIA OGNEVA

Director of Community and Customer Marketing; Invoca

Maria is happy to say she took her own advice: Strategy should always come first.

"Don't even think about the platform until you figure out what you're building. What does your customer need? What does your organization need?"

Maria recommends starting any community solution search with a lot of research. "I see people jump to solutions way too quickly. Platforms are exciting — there are lots of bells and whistles — they're fun to play with. Really do the due diligence properly; it's not a place to cut corners."

Her focus now? Slowing down. In her most recent platform selection process, she assembled a cross-functional steering committee to align on strategy, then convened a technology working group to ensure the new community technology would work seamlessly with existing solutions. "I intentionally try to slow myself down to make sure I have involved stakeholders, I understand different viewpoints, and I intentionally rid myself of any blind spots that may exist."

Her biggest takeaway from platform selections over the years? Do the work. "If you've done all the work, if you slow down, if you did your strategy, if you talk to your stakeholders, you will immediately be able to just jettison like 95% of the platforms you see, just because it's not a fit for your community or your organization."

**Maria Ogneva**  
HEAD OF COMMUNITY, Sidecar Technologies  
*the Raconteur*

**PEARL OF WISDOM**  
"Focus on behaviors and not features, and really know your community."

**Today's needs tomorrow's wants**  
You don't want to lose sight of your future needs, but you also don't want to get so enamored with possible cool new features that you pick a platform that's hard to implement, requires complex and expensive integrations, or is hard to get members to use faster.

**THE STRATEGY**

- Start with community needs, not platform wants.
- Talk to potential members—find out their wants and use cases, and what they're comfortable using.
- Have your must-haves and like-to-haves before contacting vendors.
- Don't be shy - ask community pros for suggestions, and peek into their platforms in operation.
- Start smart. Let future features factor into your decision, but don't pick a solution you can't manage well now.

**If I had to do it over again, I'd give myself a little bit more time. We felt pressure to deliver quickly. Don't let (your decision timeframe) stretch too long, but give yourself time to think.**

When selecting your community platform, don't start with the platform. As the Head of Community for the ride-sharing startup Sidecar, Maria wanted to create a national forum for Sidecar's driver community, while allowing them to have regional conversations to share local tips and real-time updates. She asked them, "What do you need? How do you want to engage?"

From that, she created a list of must-haves that took into account both driver needs like a strong mobile app—after all, they're driving; and organizational realities (with her small team, ease of page and profile creation was critical). Only then, armed with a list—did she approach vendors, as well as managers from other communities. She asked peers to see their admin consoles, to see how the options worked in real-world settings. She used community manager networks to find solutions she may not have even known existed.

In the end, she chose a solution that wasn't on her radar when she started. But by driving the process based on community needs, she was able to launch a lean version of the new community less than a month after she started the project.

The Community Roundtable 23

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## ABOUT THE COMMUNITY ROUNDTABLE

Since 2009, we have provided unbiased, research-backed resources for global community leaders. Our focus is on providing private, vendor-free spaces for community leaders to connect and publishing strategic insights and tactical plans you can trust.

*We do everything online community and only things online community.*

From research and tools, to training and education, to our private peer network, we are the world's most trusted source for online community resources. We have empowered tens of thousands of online community, collaboration, and communications professionals to build award-winning community programs, and advance their careers in community.

Our brands include:



Explore all the ways we help community leaders thrive at [www.communityroundtable.com](http://www.communityroundtable.com).