



Ten Community Fundamentals that Transcend All Use Cases

TOP THREE TAKEAWAYS

Lisa prefaced the conversation by stating that these principles are her top ten fundamentals based on her experience working with many diverse communities. It is what she consistently sees as the fundamentals that are essential to the success of a community. The highlights of the discussion are noted below:

1. **Defining a shared purpose** is at the core of all of these fundamentals. A community with a shared purpose is intentionally a great community because it is built on a social exchange around a common purpose that unites its members. The benefit should be a mutual, shared benefit. It is much more complex than simply defining the purpose of the community from a business perspective. The business benefit is the broader purpose.
2. Lisa stated that it is important to keep in mind **that “not everything that can be counted counts and not everything that counts can be counted.”** There needs to be a qualitative story to complement the numbers. If looking solely at the numbers, it is very easy to imagine a story or create one that may or not be accurate.
3. Lisa recommends **that those in community management read up on the research related to social conformity**, particularly the work of Solomon Asch. It will give excellent insight into the psychology that affects the behavior of those people within the community, but also the behavior of the team and the way they interact with each other.

 SNAPSHOT
<p>SPEAKERS Lisa Bidder (Lithium) Hillary Boucher (TheCR)</p>
<p>COMPETENCIES Community Management</p>
<p>MATURITY PHASES CMM1, CMM2, CMM3, CMM4</p>

BEST PRACTICES

Lisa gave an overview of her top ten fundamentals:

- 1. Shared Purpose:** As human beings, we are social creatures. This has been a fact since the dawn of time and is not something that will change. People congregate around common interests. A community with a shared purpose is intentionally a great community because it is built on a social exchange around a common purpose that unites its members.
 - It is easy for the business to make the error of defining the community's objective solely by what it can expect to gain, i.e. the value and business benefit of the community vs. what the business can bring to the community. This is why a shared purpose is so important. It flips the question to the member perspective, i.e. why the member should participate in the community and what he/she will receive as a result.
 - The benefit should be a mutual, shared benefit. The shared purpose should review how all the pieces work together to create a clear definition of the community's intention and objective. It is much more complex than simply defining the purpose of the community from a business perspective. The business benefit is the broader purpose.
 - For Lisa, a shared purpose is absolutely essential. It is the one piece that is core to everything else. It is, unfortunately, the one piece that is often overlooked.
- 2. Measurement:** Community managers all know that measurement is essential to ascertain whether or not campaigns, programs or the community itself have met their objectives. It is not surprising – given the difficulty of implementing an appropriate measurement strategy – that it is still a struggle for many of those working in community management.
 - Lisa explained that there can be challenges with just accessing the right data. For example, if you are trying to measure up-sell from the community, that kind of data insight typically requires integration in order to track who in the community are customers and what impact that may or may not have on their spending behavior vs. a typical non-community user. In this instance it is clear exactly what is to be measured, but for a variety of reasons it is difficult to access the required data.

BEST PRACTICES, CONT.

- Data access is not the only challenge. Sometimes the issue is not having a clear objective for the community. Without a clear objective, success cannot be measured. This is where shared purpose again has value. Measurement is important, but a strategy that is clearly aligned to the community objective(s) is essential. This way, that story can be relayed back to the business so that the business leaders understand the message you are trying to convey with data that makes sense to them and aligns with what the business is trying to achieve, as well.
- Lisa stated that it is important to keep in mind that “not everything that can be counted counts and not everything that counts can be counted.” There needs to be a qualitative story to complement the numbers. If looking solely at the numbers, it is very easy to imagine a story or create one that may or not be accurate. Frankly, it is probably rarely accurate if you are not looking at qualitative reporting.
- You need to understand what is going on not just from a numbers point of view, but also from a qualitative point of view. This can be achieved with surveys, moderation insights, reporting, etc. Lisa added that it is not uncommon in her line of work to encounter businesses that have not put any real time and effort into their qualitative reporting. They do not understand the story that goes with their metrics and report inaccurate data to their organizations as a result.

3. Roles and Responsibilities: Lisa commented that her business brings her in contact with many community launches. Given this experience, she has noticed time and time again that when there is the launch of a community, there will be a solid framework of roles and responsibilities dedicated to that launch. Once the community launches, that dedication to the roles and responsibilities dies off. When that happens resources are stretched thin, often leaving one person who ends up wearing many hats.

- A common conception with roles and responsibilities is that their definitions can smother creativity because the sheer exercise of defining is restrictive. Lisa would argue the contrary. This argument can be backed by research conducted by the Harvard Business Review in 2012. What was discovered in this research was that it was more important to plan the approach vs. defining the roles. Collaboration improved when the roles of the individual team members were clearly defined and understood.
- The example given was a team of doctors and nurses working in an emergency room. The team never knew what kind of medical case the next ambulance would deliver. While the team waited, no one negotiated their roles; the roles were already defined. As a result when the patient arrived, the team would spring into action doing what needed to be done. In small communities this becomes even more important because you are reaching out to other departments in the business. These departments need to understand what their roles and responsibilities are to you, as well as the other way around.

BEST PRACTICES, CONT.

4. Planning: When thinking about the goals and objectives of community, the destination is known. What is often forgotten is the plan to get to that destination; the route of that journey. The planning part seems obvious, but as community managers and business owners, the community plan is not always defined. This again comes back to a shared purpose which, unfortunately, often leads to a gap. Lisa personally thinks that the reason for this gap is actually the time and commitment that is needed to create it when there are so many other competing priorities. Lisa helps people with planning every day, yet she admits that she has a difficult time doing it personally. Lack of planning is not unusual for most people.

5. Policy, Process and Procedure: Lisa showed a slide with what she felt to be an apropos quote: “To be prepared is half the victory.” No matter who Lisa speaks to within community management, the single biggest pain point is finding the time to do all the things that are needed.

- Guidelines are essential for a couple of reasons, as are the policy, process and procedure. They are needed for protection, but they also offer support by freeing up time to do other tasks that matter. If everyone understands the expectations of them when they are in the community, it is easier to swiftly address issues as they arise, especially in a crisis situation.
- Lisa gave an example of a company in the UK that had the unfortunate instance of having their systems down for three straight days. The company approached this crisis with black humor and a clear crisis plan. When these systems came back up, the company actually had a higher “positive sense” than before the crisis. That did not just happen by accident. The team knew what to do when the crisis hit. There were clear processes and policies for how the crisis was handled behind the scenes. The team did not waste time going back and forth checking on what could or could not be said or done. Lack of process is what often forces people into a panic because they end up questioning everything. Nothing effective happens when people are stressed and panicked. However, when there are clear processes and policies in place and everyone knows what their role is and what to do, they have the freedom to deal with the crisis head-on.

BEST PRACTICES, CONT.

6. Moderation: Lisa commented that the role of moderation and the lines around it are quite blurred. The core essence of this particular fundamental for Lisa relates to anyone who has the role of responding to members within the community.

- Slide 15 in Lisa's presentation has a video that is well worth watching. It is a video from the show "Candid Camera" back in the 1960's. The video pokes fun at the research of social psychologist Solomon Asch and his work in social conformity. The video portrays what happens when a group of people are placed in a controlled environment where certain people plan to behave in a particular way. This planned behavior ends up influencing those who are not aware of this plan to follow the lead of the group and conform to the behavior, no matter how much it defies their sense of logic. From a community management point of view, this research is important.
- Lisa recommends that those in community management read up on this research because it will give excellent insight into the psychology that affects the behavior of those people within the community, the behavior of the team and the way they interact with each other.
- The key message is that people behave in a particular way in a group. They follow what everyone else is doing and they will mirror the behavior that they see from others in the community. From a social psychology point of view, group conformity has quite a powerful impact on community. People's social behavior is determined by the accepted set of norms. People have an inherent need to fit into the environment and be accepted by their peers, so they conform to the norm. It affects how they behave because they want to be a part of that group.
- In a healthy community environment, those healthy sets of norms should be dictated by the community and the moderation team. They should absolutely be mirrored by your most active members and that will influence the rest of the audience in a community. What this means is that having a clear process around moderation, a clear process around tone of voice and the way you engage and build that relationship with the community is essential. Furthermore, it is also very important that the processes remain focused on maintaining a positive atmosphere in order to steer member behavior vs. quickly dispensing discipline.
- Your team knows and enforces the community guidelines and moderates to those guidelines. They should always act in a friendly, professional, fair way and it must be consistent. Members in the community need to feel that you treat them the same as you would anyone else in the community.

7. Content Strategy: Many businesses think that the most important part of the community is its people. In actuality, the most important part of the community is the content. The content is what brings those people to the community; it is why they are there.

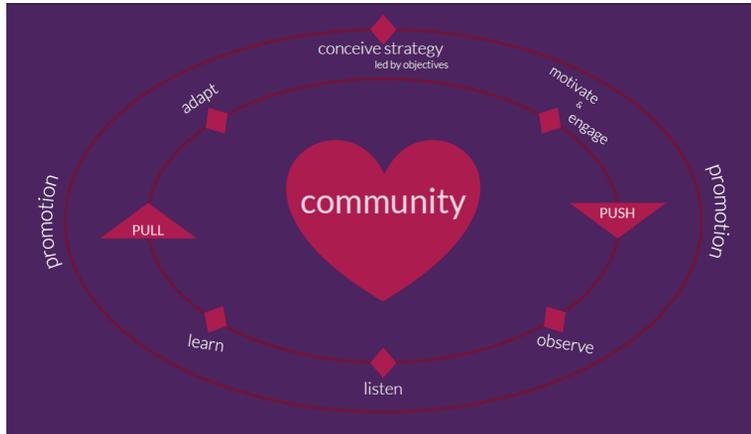


Figure 1 - Content Strategy - Slide 18

- Lisa thinks of content as an individual fundamental vs. lumping it under planning because although it does fall within a content plan, the content strategy itself is such a vital part of what happens in a community. Unfortunately, it is often overlooked. In Lisa's work, she sees that there is a clear gap in this area that is repeated time and time again.
- When speaking about content, anything that serves the need of the consumer and simulates engagement within your community environment is part of the content strategy. It could be blog content or it could be the opportunity for expert Q&A. Some people might even suggest that it includes contests within the community. It really depends on your audience and what they are looking to gain from and/or bring to the community. Accordingly, the definition of content could change quite significantly.
- Lisa believes that the main reason a content strategy is needed is to ensure that the content produced works hard for the community. It should bring the right audience into the community and it should engage them in topics and content of interest for them. With the right content in place promoted to the right audience, the right people will be drawn to the community. Those people will create content and that content will, in turn, drive engagement, which will then drive content creation. While that community is creating content, you are able to observe, listen and learn from the community and adapt not just as a business, but also within the way that you engage community members and the content that is created for them. A content strategy is cyclical, which allows the community to give its members something that they need while also learning from them and taking that back into the business.

BEST PRACTICES, CONT.

8. Promotion: Public and private communities always make the promotion conversation interesting. Often when people talk about promotion, they talk about when the community meets a point of critical mass, i.e. the positive impact of SEO is experienced because Google now does some of the promotion work. In an internal community that benefit is not enjoyed.

In an open, public community there is an SEO impact that is effective, as long as the people managing those communities do not sit back on their laurels and stop promoting the community as much as they could or should. Promotic

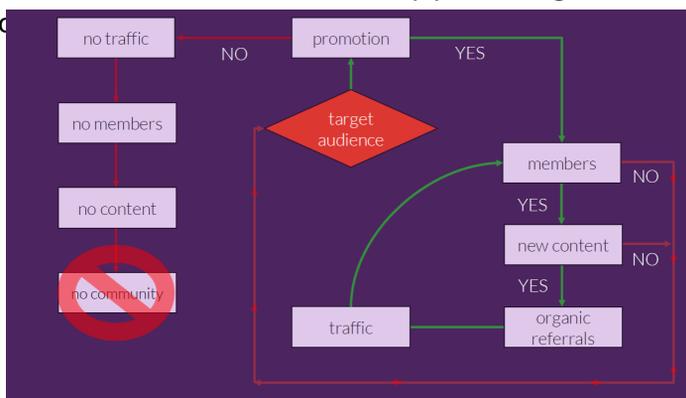


Figure 2 - Promotion - Slide 20

- Communities need a promotion plan that makes sure that the community is visible and targets the right audience. Effective promotion will bring in new members and those members will create new content that will drive more people to the community (the content cycle mentioned above). If members are not creating content, it begs the question of whether or not the right audience is being targeted and whether or not the promotion is effective.
- This comes back to the earlier measurement fundamental. On one hand is community promotion and on the other hand is whether or not that promotion is effective and if not, why it is not effective. This sits heavily with the measurement strategy. If they are not working, the plan needs to be adjusted.
- The community plan should not be rigid and non-changing. A promotion plan should be aligned with measurements so that it is something that is actively monitored on a regular basis to see how it impacts the community and whether or not new members are joining. If new content is not being created, assess if there is a failure to convert people into members. If so, it may call for a re-visitation of the content strategy.

BEST PRACTICES, CONT.

9. Recognize and Reward: Lisa stated that as humans, we all share a need to feel appreciated and valued. Over time, continued failure to be noticed, acknowledged and appreciated will undermine motivation and that will, in turn, impact contribution to the community. Therefore, recognizing and rewarding those who participate is absolutely essential.

- Mature communities have a clear recognition program, but Lisa does not feel that a formalized program is needed. A common mistake made by communities is to try and fit the mold. It is almost a success measure. A program that recognizes the community's most active members means that the community has achieved success. In reality, managing that type of program can be very draining on resources and time. Sometimes holding off on doing such a program is a better way to go, but only if there is a clear strategy for recognizing and rewarding members regardless of whether there is a program or not.
- It could be as simple as deciding to actively and publically thank and acknowledge people who create useable content. This is absolutely essential to ensure that members continue to engage and contribute content in the future.

10. Remember Why You are Here: Again, competing priorities have a tendency to erode this very basic fundamental. When the day-to-day tasks begin to pile up, it is easy to lose sight of the community objectives and whether or not they are being achieved. Therefore, periodically re-visit this question by asking: "Why are we here and what is it that we are trying to achieve?"

LESSONS LEARNED

The following is a summary of lessons learned as shared by participants within the discussion:

- Hillary asked participants to share if they have gone through the exercise of defining a shared purpose for their community with the rest of their organization. Lisa added that if participants have not yet done this, it is worth investing the time. In her work with clients, this is the one exercise that she stresses should be undertaken with organizations large and small.
- Whenever stakeholders come together and work through this exercise and define the shared purpose, they end up with a better understanding of why this matters to them and the benefits to their departments. Once that is defined, those stakeholders are much more giving of their time and resources when needed.
- One participant stated that she went through this exercise with a pilot program before they went public. They asked for shared value by asking what the value would be to their customers or potential members. She cautioned that what people say is the most valuable thing to them or why they would go to a community and contribute time and effort is not something that they may actually follow through with when the time comes to participate. Therefore, she stressed that Lisa's earlier point for the need to follow-up and ensure that the shared value truly exists as the community grows is very important. People will say that they will contribute, but with competing priorities it can very quickly become less important to them without that shared value. Make sure that there is a reason for people to come to the community. Re-calibrating is equally important. Lisa agreed.
- Lisa was asked if she sees a difference between internal and external communities and their ability to achieve results. Lisa replied that it depends on what it is that you are trying to measure. There are typical levers in an open, public community.
- For example, SEO impact on a community that has been in existence for more than six months should see an SEO impact that drives at least 60% of all traffic into the community. In even more mature communities, those numbers can rise depending on the industry. It is not unusual in a community of mobile products to see that number as high as 90%. In an internal community, you will not see that kind of behavior.

LESSONS LEARNED, CONT.

- Lisa further explained that the question here is not necessarily the answer you would expect to see from measuring, but the fact that you need to be measuring in the first place. Furthermore, you need to understand what the data is telling you. For instance, if you are running a particular strategy or initiative and you are trying to drive a very particular behavior, the measurement should reveal whether or not there is an actual change in that behavior for that initiative. Also, ensure that you are comparing data year-to-year. As well, look for seasonal impact.
- Very often people get excited with their measurements only to realize that they did not take into account normal seasonal patterns. An accounting community would typically expect to see activity increase just prior to tax deadlines. The rest of the year would be much quieter. Therefore, an increase in activity prior to a tax deadline is not necessarily a result of the community, but rather an historic, proven seasonal pattern. Understand those seasonal spikes within the data and take action as a result.

ADDITIONAL INSIGHTS

Hillary asked participants to share their top take-away from the call:

- The influence of group conformity.
- The importance of shared purpose, which one participant felt was worth defining within her company.
- The "not everything that counts can be counted" philosophy.
- Lastly, it resonated with one participant that it is very easy to get caught up in the day-to-day activities of running a community. It is, therefore, important to remind others of the shared value of defining why the community is in place and using that as an opportunity to remind one another of the business purpose behind this way of working.