THECR NETWORK

Getting the New Member Experience Right: Lessons from Autodesk

SNAPSHOT

SPEAKERS
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COMPETENCIES
Community Management,
Content & Programs

MATURITY PHASES
CMM2

TOP THREE TAKEAWAYS

In the 2015 SOCM, one of the key recommendations was to focus on building a welcome process. As such, Camilo Lemos was asked to share his lessons learned on this key task at Autodesk.

1. **Camilo summarized his talk by stating that simple is better.** Aim for email content that looks nice, but is also rich in information. Use visuals only where they will have a meaningful impact, not just for the sake of using them.

2. **Involve the appropriate teams upfront.** By having the appropriate teams involved upfront in the planning process it helps to avoid surprises just before launch or worse, just after launch.

3. **Do your homework.** Investigate several email programs and test the platform extensively in multiple systems before making a decision.

4.

OVERVIEW

1. **The Importance of Welcome Programs:** Welcome programs correlate with stronger engagement. All in all, this is a quick win for community managers to boost engagement.

2. **Background:** Camilo is a CR member and a Community Manager for Autodesk. He is based in Switzerland.
   a. Autodesk is a software and technology company.
   b. The Autodesk community was established in 1986. It was originally hosted by CompuServ and is currently hosted with the Lithium platform.
   c. The Autodesk community has 2.8 million registered users with 2.5 thousand new registrations every day and approximately 25,000 daily board views.
   d. The community's welcome email system was put in place in 2015 and is part of a bigger first-time user project consisting of different phases. Phase I is the welcome emails.

3. **Identifying Information and Structural Gaps:** In December of 2013, Autodesk decided to redesign the whole community. It was a very busy time and everyone was very preoccupied with different parts of the community restructuring project. As a result, they did not examine how the new members performed compared to the senior members. They did this later in the redesign, but Camilo wished that they had done it earlier. The basic question they asked themselves was: "How proficient were new members compared to senior members?" This looked at the following:
   a. *Information Gaps*
      i. Did their posts contain all the necessary information?
      ii. Were members describing their issue well?
      iii. Were they formulating their questions well?
      iv. Were they using all the tools available to them in the community?
      v. Were they posting on the correct boards? At Autodesk there are about 150 products. That means several categories and within those categories, many different boards. Consequently, it is not always easy to find the appropriate board for posting. Senior members do a better job vs. new members.
      vi. Did members abide by the community's ground rules of being courteous and helpful?
         A. New members were not able to write a good post on the correct board with the correct tone because the newer members were not as proficient at using the community as the senior members.

OVERVIEW, CONT.

b. *Structural Gaps*
    i. This prompted further investigation into the following:
        A. The redesign focused on improving the structure by placing all the information in one nice and tidy place that they termed the "Community FAQ Board". This consisted of a list of topics. Replies were not permitted to ensure that the board did not get messy. Instead, Kudos were enabled. This helped them to see which articles were being read and which articles were more relevant.
c. *Was the Problem Solved?* Camilo's test question is: "Is it a problem solved?" In many cases, the problem was not solved because the answer was not "incredibly easy to find". That is why Camilo mentioned earlier that he wished this step had occurred earlier.
d. *Welcome Email Guidelines:* Camilo shared Autodesk's welcome email guidelines:
    i. **Guide users directly to each specific topic.** Sending users to the board and expecting read through a list of topics shortly after registering is not a realistic expectation.
    ii. **Keep the content informative, but light.** Step away from the marketing side. Help the user to be more productive by helping him/her to find an answer quickly. Make the email topics concise. Explain to the users what they will find if they click on the link.
    iii. **Make the emails visual where needed.** This way, if the users did not click on the link, they were at least left with an impressionable image, such as being directed to the search field or showing them what buttons they needed to click to go to a specific board or how to use the tools in the accepted solutions
    v. **Start with basic topics.** Progress to advanced topics in the three emails.
        A. The first email starts off with introductions, the ground rules of the community, how to search and how to post. The second email highlights the Kudos and accepted solutions, exploring the ranking system and the various ranks. The third email talks about Autodesk's IdeaStation and how to interact with the employees, etc.
    vi. **KISS – Keep it Simple Stupid.** This last guideline is Camilo's favorite. This guideline is used to direct many of their efforts. For instance, they do not make their emails flashy or too busy with information.

OVERVIEW, CONT.

e. *Project Workflow:* The work flow for the redesign process includes the following:
   i. **SMaC:** SMaC is an acronym for Social Media and Community. SMaC creates the content. Camilo stressed that the community creates the content and they are very protective of this function. They will listen to suggestions but, ultimately, Camilo's team owns the community.
   ii. **The Content Team Reviews the Content:** The content team was very adamant about how the emails were written and how they came across to the new users.
   iii. **UX Designs the Emails:** The UX design team was the team that created the content for the five basic guidelines listed above. This team pulled all that content, put it together and designed the welcome email.
   iv. **SMaC Reviews and Approves:** The content team had a few review sessions with the UX design team to review progress and give feedback until the design was approved and the welcome email was designed.
   v. **UX and SMaC Test Platforms:** This step was the most time consuming part of the whole process. The UX design team and SMaC tested platforms, i.e. email marketing systems. Some of them provided some of the features that were needed and were very good with metrics. Others did not, but were better with automation. In the end, they chose Campaign Monitor. This met a majority of their needs, but they did need to build the automation part of it.
   vi. **UX Tests Emails:** It was critical that the three emails were tested on all the different email providers, which is a very important step as it ensures that not only will the email be sent properly, but that the users are able to receive it no matter which email provider is used. This is especially important if the email contains imagery and videos.
   vii. **Legal and Marketing Approval:** Camilo cautioned that this is an important, but sometimes overlooked step. He did not anticipate that legal would have to sign off on the welcome emails, but they did.

OVERVIEW, CONT.

    f. ***Results and Metrics:*** Camilo shared the results of the project to date, which is approximately five months old:

        i. **Results and Metrics – Community:** Camilo prepared these figures by comparing the previous four months before implementation of the project to the four months post implementation of the welcome email. Three areas were measured: registered user sessions (an increase of 50%), Kudos (an 80% increase) and accepted solutions (an increase of 13%).

        ii. **Results and Metrics – Emails:** The figures below were sourced by MailChimp. Camilo stated that it was not easy to find a way to benchmark against the industry, but MailChimp worked.

            A. 850K emails were sent.

            B. There was a 29% open rate vs. the industry benchmark of 22%.[1] There was a 6.3% Click-through rate vs. the industry benchmark of 3.7%.[2]

            C. Only 0.5% of users chose to unsubscribe.

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[1] As provided by MailChimp.
[2] As provided by MailChimp

BEST PRACTICES

1. **Consider a Three-Part Welcome Email Series:** Camilo gave an overview of this series:
   a. *Why a Series of Emails?* Camilo stated that the list of topics that they wanted to cover in the welcome email was quite long. There were a few interesting things that they wanted their users to be familiar with in the community, such as how to post, how to search and understanding the various areas within the community,
   b. *Goals:* Camilo highlighted the goals of the welcome email series program:
      i. To increase the number of board views by registered users (i.e. to ensure that users come back to the community).
      ii. To increase the number of Kudos. This goal and accepted solutions are the two most essential tools in the community.
      iii. To increase the number of accepted solutions. An important rule was to ensure that the solution provided helped the user solve his/her problem completely. The email welcome series helped Autodesk to achieve this goal in terms of community, stats and metrics.
      iv. To have open and click-through rates that were above the industry standard. This goal encompassed the two main metrics for the welcome email to ensure that a solid series of emails were built and that they worked. As for the industry standard, they measured against the software technology industry. They also measured against the online community (the spot from which emails were sent).

LESSONS LEARNED

- Camilo was asked if he has dedicated UX resources or if it was more of an on-demand request from another group. Camilo replied that it is separate, but the UX team is available to them. They work closely with this team on a majority of their community projects.

- Camilo shared his lessons learned in this project:
    - Write the business requirements upfront and get buy-in from all the other teams. For Camilo, this involved the legal and marketing departments.
    - Decide on the type of content that will be included in the welcome emails, i.e. images, text, video, etc. Camilo stated that they did try video, but it was very challenging, especially when it came to user email compatibility. He does not recommend video.
    - Find a marketing email platform ASAP. This should really be the first step as it will determine if the current system can fulfill all the required needs of the welcome email project. If not, begin looking early as this can be an incredibly time-consuming step.
    - Make sure you can track the main metrics. Some email platforms do not even allow for the tracking of email metrics, let alone open and click-through rates.
    - Make sure you can easily edit the emails. Camilo shared that this was another function that the platform did not have available. In some cases, it required going through a painful email process to make a simple edit.
    - Camilo cautioned that if an email is edited ensure that it does not create a second version of the email as that will skew the metrics. If email A is sent and later edited ensure that it continues as email A, not email A.1 with metrics starting all over again.
    - Test emails on all the major email providers, as explained above.
    - Stay away from !!! and ALL CAPS as these nuances are picked up by SPAM filters. Make sure that it is also firewall-friendly because imagery can prevent the email from making it past the firewall or antivirus system set up by a company.

- Camilo was asked to name the top three contenders in his email marketing platform research. As mentioned, he chose Campaign Monitor. However, he could not even create a top three list because most were unremarkable. That said, MailChimp was definitely the second choice.

LESSONS LEARNED, CONT.

- One participant was curious to know if the increase in Kudos and accepted solutions could be linked to the email welcome implementation or if it was incidental to people contributing more because the emails were sent out. Camilo replied that the metric is a result of the email marketing platform being able to know which specific link was clicked, not only a general click-through rate. Accordingly, they noticed a good percentage of the clicks were on Kudos and accepted solutions. There is no direct way to measure this because people may click those and read the material, but not use the tool. As well, some users who did not read the material could still use the tool.

- Rachel asked about the follow-up process, if any, and how involved the community manager becomes after the emails are sent. Camilo explained that the first welcome email invites the new members to introduce themselves. There are about 7 to 10 members a day who introduce themselves. The community management team, the rest of the employees and members of the advocacy program use that opportunity to get involved in welcoming them.
    - In terms of following up to see if they have updated their profile, that is not something that they have the capacity to do at the moment due to the sheer volume of people who register. About 30% of people open their welcome email out of the 2.5 thousand who register. That equates to more than 800 people who open their email and come into the community. At this point, they can only see if an email was read or not read.

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- Hillary asked why the number three was chosen for the number of emails. Camilo stated that there was far too much content for one email and three felt like a good number because it was not over the top. They found a sweet spot for the amount of content to be used in each email – not too little and not overwhelming.

LESSONS LEARNED, CONT.

- Camilo was asked whether or not he has considered using pop-up welcome tutorials for new members and if so, how they would connect with the cadence of the emails. Camilo replied that that is planned for the second phase of their community experience project. They have planned call-outs or pop-ups, but not necessarily tutorials. They plan to use them to fill in the gaps for those people who do not open the welcome emails or click on the links.

- One participant was curious as to whether or not the welcome messages were tailored to different groups of people, i.e. segmented. Camilo explained that in the next phase they plan to translate into different languages or – at the very least – provide international users with a way to view the content in a different language. Other than that, they cannot segment because to do so in their industry would be a huge undertaking.

ADDITIONAL INSIGHTS

1. Hillary asked participants to share the structure of their welcome process:
   a. One participant sends out a basic welcome message to new members weekly while another member uses a short welcome video that explains the purpose of their community.
   b. Rachel added that TheCR's research confirms the importance of welcome processes.

2. Hillary also asked members to share their biggest take-aways from the call:
   a. Three participants found the series of emails intriguing.
   b. Rachel was quite impressed with how "high gloss" Autodesk's welcome process is and how it makes people proud to be associated with the community.
   c. Another participant shared that her take away was to actually pay attention to the metrics. Sometimes they get so focused on drafting the content of welcome emails that they forget to examine the metrics of who actually opens the emails and clicks on the links.