THECR NETWORK

How to Prove Value and Measure Growth and Engagement for Your Community

SNAPSHOT

SPEAKERS
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COMPETENCIES
Metrics & Measurement

MATURITY PHASES
CMM1, CMM2, CMM3, CMM4

TOP FOUR TAKEAWAYS

As Jillian often collaborates with members one-on-one on this topic, Hillary thought it would be a worthwhile endeavor to discuss as a community. The highlights of the discussion are noted below:
Jillian summarized her presentation with the following:

- Simplify every metric question you are asked by breaking it down into easy to digest word problems.
- You can prove value by figuring out why your community exists. Then focus on the who, how and what its existence serves. This will make it easier to solve.
- To prove your community is growing and engaging, take a huge step back and look around. What is important to your community? What would perfection look like?
- When it is time to share your results, always aim for short, concise and non-user friendly wording. It is advisable to always include graphics.

OVERVIEW

Jillian's Background: Jillian is TheCR's Community Strategist. She has an engineering degree and a passion for numbers. She thoroughly enjoys working with math problems, which is the basis for metrics. Therefore, she is often called upon to tackle some of the specific metric questions within the membership.

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BEST PRACTICES

1. **To Determine the Appropriate Metric, Ask Yourself These Questions:** Jillian stated that when a member is asked to provide any type of metric for their community, the first step is to equate the request to a word problem. That involves stepping back and figuring out what is being asked by finding the who, when, how and what of the question. Some examples of appropriate questions to ask are the following:
    a. Who is the result for? Who is the question about?
    b. Is there a specific date range that needs to be reported?
    c. How will you get the data you need and how will you share this information?
    d. What is the goal and what outcome is ideal?

2. **Learn How to Prove Value:** To perform this task, Jillian again offered a variety of questions:
    a. Why does the community exist?
        i. Many communities are established without a specific business purpose in mind initially, but end up inheriting or developing a purpose over time.
    b. Who does your community serve?
        i. Are your members customers? Leads? Employees? Field technicians?
    c. Which business groups benefit from your community's existence?
        i. Whose job is made easier by the community?
            A. The answers to the above questions will set you on the path to proving the value of your community.

3. **Discover How to Demonstrate Growth and Engagement:** This is another situation where you have to step back and determine what is happening within your community. Therefore, ask these questions:
    a. What is important to this community?
        i. To ensure that customer's questions are answered quickly.
        ii. It could be growing the resource collection or knowledge base of the company.
    b. From a high-level perspective, what is the perfect vision of success?
        i. Examples of a perfect vision of success are to have one million registered members or to have at least 1 of those members active and contributing. Or it could be the community's ability to deflect, for instance, 20% of the company's support department volume saving the company X number of dollars per year. Looking at these metrics as a whole helps point to success because it answers the question of what it is that you are trying to achieve.

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LESSONS LEARNED

- One participant asked if it was possible that a community served two purposes. This participant's community provides content for their customer base to help with governance risk and compliance, but they also have a very active discussion forum that shares ideas and help each other with problems. Jillian replied that it is totally possible to have two purposes. The community that she is working with at the moment was founded to serve one purpose, but that purpose did not work out. Over the past year, it has evolved into a technical support community. In addition to that, they are launching an internal community on the same domain.

- Jillian asked participants to share the types of benefits that their communities provide:
    a. One participant stated that he has a security community. The leadership of that community keeps a watchful eye on emerging security threats.
        i. This participant is trying to prove the value of this community. Jillian stated that when proving value, it is important to determine what the community does and the cost that is currently associated with that service/benefit. In this case, what would it cost to provide an early awareness system? The answer will help put a dollar value on the benefit to prove its value to the company.

- One participant shared a resource that she has been using to help determine the value of her community. It also shares a list of questions to ask about the community. The book is called: *"Cultivating Communities of Practice"* by Etienne Wenger. He has divided the questions into focus, community, and domain, which helps the community manager to define what is important to the community before trying to track metrics.

- One participant asked about how to capture difficult metrics, such as connections made and/or actions that are catalyzed by the community, but occur outside of the community. It comes down to assigning value to what it is that the community offers. It definitely involves a great deal of research, but if you can come up with a number for even just one of those instances, it is a starting point.

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LESSONS LEARNED, CONT.

- This same participant asked if Jillian has ever established a baseline and then circled back to assess what has happened as a way to show the value of the community over time. Jillian replied that there is an immediate value and a long-term value. It depends on the community. In the community that she is working with now, they do not circle back. However, that would be a good idea. Many times measuring the value for communities is qualitative. For instance, assessing the overall emotion of the community. If people are happy and satisfied, they will be retained. That adds value to the organization.

- One participant asked how to consolidate the feedback for communities to executives so that they will read it. Another participant stated that it is essential to find out what is important to the executive. Once that is determined, show how the community can help them with those goals, i.e. show how it will make them successful. For this participant, the community started out as a collaboration venue. However, that is not something that executives want to get behind and continue to fund. So, they began showing how the community deflected support call volume. That led to an increase in support technicians for the community. A reduction in call volume equals money saved, which looks good on the executive.

- One participant shared that his challenge is "big, messy data". He has a mature community that has gathered incredible amounts of information – historical as well as current. There are also many different sources to capture this information. However, in presenting this data he has two challenges. First of all, it is messy. There are strings of data and tags that need to go through an analytics cleansing process. There is also superfluous information that is not needed. Secondly, he cannot please everyone. Some executives say that the report is too general, too high level and simplified. Others say that it is too detailed. This participant was looking for a way to focus on the data and deliver the insights that meet not only his team's needs, but the needs of those who pay the bills. Jillian replied that it is perfectly acceptable to have different dashboard levels. Her advice, especially for large, mature communities with a lot of data, is to find out exactly what each reporting level needs and create different levels of reporting. You never will satisfy everyone, but start by identifying the purpose of the community. Answer that question for each level when building the reports.

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LESSONS LEARNED, CONT.

   a. One participant suggested creating scorecards for specific initiatives to show before and after information.
   b. Jillian added that in the community she is working with, they have a large port and dashboard that they share with the rest of the community team. The front page just has charts. If someone wants to send that to someone who is a non-user, it is easy to understand. All the other parts of the report have a specific numerical data that outlines what was completed each month.
   c. Another participant shared that his dashboard is very high level. It lists four elements regarding community events – the reach, net satisfaction, net effectiveness and a net promoter score (which is the likelihood to recommend). That is updated continually and automatically. Annually, they do a set of reports that go into much more detail. That report is not shared with the GM, but is of interest to the leadership teams for each of the communities.

7. One member asked if everyone could share their top three or four metrics:
   a. New registrations in the community
   b. Growth - registrants, unique visitors
   c. Reach (attendance at events), net satisfaction, net effectiveness, net promoter (likelihood to recommend).
   d. New users, returning vs. new visits, total visits, unique visits, bounce rate
   e. Engagement - content creation, missions completed
   f. Task accomplishment
   g. Measuring watch time for videos is a key indicator of success for one participant as videos are a key part of his organization's content strategy
   h. Daily vs. weekly vs. monthly unique users

8. One participant shared that they have communities at various stages of maturity, making it difficult to report on community-to-community statistics. Jillian's advice was to go with what is predictable and state where the community is going in a modest way.

9. This same participant asked if Jillian is doing anything to tie readership to daily, weekly or monthly numbers. Jillian stated that they do report on the number of members who are active each month. She does try to tie it to the newsletters, but the number for the newsletter is so different from the active community members. Jillian does plan to research this further and will report back to members.

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CASE STUDIES – PROVING VALUE

Case Study #1 – Customer Support Software Community	Case Study #2 – Large Financial Company
• It is a mature community with millions of registered members. Many are active, but many have not been active for over 10 years. • Questions are answered by customer support, other customers, resellers and super members.	• It is a very new community. It was initially established to allow for customer collaboration. They wanted to have customers come in and share how they handle their finances, their budgeting advice, etc.
• Questions would have been posed to customer support via phone or email. The questions are how-to related questions, best practices, future development suggestions, potential viruses, etc.	• The community very quickly turned into customers posting questions about the product, how-to related questions, support from peers during difficult situations and complaints. This forced the community to have dedicated client support, community managers and field associates.

<u>**Proving Value for the Above Case Studies**</u>
Both communities provide an alternative one-to-many support channel. As a result, they deflect a portion of the normal support volume.

1. **What Benefits Does this Provide for the Company?**
   a. Answers are accessible to more than one customer. Therefore, multiple customers are served.
   b. The answers on the community forum are valuable and offer a growing resource for the company that can be found on the company domain, search engines or social sharing.
   c. The community is open 24/7/365, which is far less expensive that maintaining support staff.
   d. Customers are able to find answers and multiple workarounds quicker than the SLA (service level agreement) provided by support, which improves customer satisfaction and retention.

2. **What is the Value?**
   a. To answer this, take a step back and ascertain how much it would cost for a one-on-one support ticket for these types of support questions. Compare that to the cost to run and support the community by the number of resolved questions.
   b. Also take a look at how many questions are answered by non-employees.

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CASE STUDY – GROWTH AND ENGAGEMENT

Jillian was asked to provide a monthly report showing the progress of a community – but it could be no more than a paragraph with a chart because it would be included in a larger social and communications report. To do this, Jillian asked herself the following questions:

1. **What is important to this community?**
   a. Growing membership, growing knowledge resources, proving that answers are abundant and proving that the community is a well-visited resource during product launch and other busy seasons.
2. **What would "perfect" look like?**
   a. Every question is answered (Jillian's ultimate goal), every member makes at least one post and every visitor is registered.

Growth and Engagement Formulas

3. In order to report on growth and engagement, they decided to come up with growth formulas and engagement formulas. They reported on only two elements so that when they handed the report to the executives, they would see only two numbers. However, each one of the formulas below reports on other metrics. The magic sauce that holds it all together is the fact that they weight certain metrics:
   a. ***Growth Formula:*** The metrics for this formula include total registered members (total and monthly), threads, visits and newly registered members. Special weight is given to overall users and threads.
      A. Jillian stated that the formula is a simple as members X the number + threads X the number + visits + overall members. This number is reported to the executives.
   b. ***Engagement Formula:*** Metrics include replies, threads, resolved threads and visits. Special weight is given to resolved questions and replies.
      A. Similar to the above formula with special weight on questions and replies.

Reporting

4. When reporting to an executive, the results need to be displayed in a concise, easy to understand manner. Use graphs and charts. Provide historical data for comparison purposes and strive to use terms in the chart and community that executives will understand.

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ADDITIONAL INSIGHTS

Hillary asked to share their biggest challenge on the topic of proving value or measuring growth and engagement in three words or less. Participants shared the following:

- Finding common needs
- Interpreting/sharing value to engineering teams
- One time posters
- Ineffective survey data
- Messy data and data volume
- Understanding that member numbers are not most important metric
- Effective metrics definition
- Conveying testimonials quantitatively
- Prioritizing resources
- What metrics mean across the organization
- Executives wanting numbers
- Meaningful measure of success
- Translating community into dollars

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