



Developing B2B Social Communities: Keys to Growth, Innovation and Customer Loyalty

 **SNAPSHOT**

SPEAKERS

J.J. Lovett & Sam Creek ([CA Technologies](#)) & Hillary Boucher, TheCR

COMPETENCIES

Strategy, Leadership

MATURITY PHASES

CMM1, CMM2, CMM3, CMM4

TOP THREE TAKEAWAYS

Each summer TheCR Network hosts a Summer Book Club. This year, the membership has had the good fortune to discuss a book authored by its own members – J.J. Lovett and Sam Creek of CA Technologies. The book is entitled: *“Developing B2B Social Communities: Keys to Growth, Innovation, and Customer Loyalty”*.

1. **LinkedIn and Twitter help drive viewership.** This has been the experience of one participant when she posts content teasers. J.J. stated that they also use syndication, although it is usually around their big ticket items. Members say that this provides value.
2. **Try a Spider Graph.** This is an effective way that J.J. and Sam have demonstrated the measurement of community and maturity. J.J. uses the different competencies from The Community Maturity Model to detail what each competency means in order to provide a more exact definition. Each competency is rated from 1-10 within the Spider Graph to show that this is what, for example, a rating of 4 means and the steps needed to move up to a 6 rating. The primary objective of these Spider Graphs is to start a conversation.
3. **Constant effort of engagement maintenance.** Developing social communities – whether they are B2B or B2C – requires the constant effort of engagement maintenance through executive support. One participant broke this down into 3 levels:
 - a. The first level is simply having the executive’s support.
 - b. The second level is executive encouragement where the executive allows all of his/her direct staff and vertical staff to engage in some way.
 - c. The third level is actual executive engagement on the platform.

OVERVIEW

1. **J.J.'s Background:** J.J. is the Director of Online Communities with CA Technologies.
 - a. J.J. has been involved with community management since 2005. He partnered with Sam along the way to transform the flailing regional user program. The goal was for increased and more widespread, effective communication with their customer base.
 - b. CA Technologies was formerly known as Computer Associates. It is a company that is familiar with the challenges associated with the brand name due to a small accounting scandal in 2002. It is also a company that has grown through not only organic development growth, but through many acquisitions. That has its inherent challenges associated with customers and former employees engaged in their communities.
2. **Sam's Background:** Sam is the Principal Business Analyst at CA Technologies.
 - a. Sam began his community career with internal communities in 2008 and came to CA from a start-up that worked with a community of developers.
 - b. When Sam joined CA, he noticed that there were not any external forums. However, there were many network tools for user groups. Sam worked with J.J. and the community team to pull all that together to create a program, gain funding and create a consolidated system that was hooked into the overall SSO and identity systems.
 - c. Tied to that, Sam has recently launched Jive, which was a move from their homegrown system.
3. **Developing B2B Communities:** Hillary asked J.J. and Sam why the book focused specifically on B2B communities:
 - a. There is a definite difference between the two types of communities. There is an internal stakeholder level of engagement that needs to occur to be successful at the B2B level. This is especially true in the software industry. At the enterprise level, the engagement and relationships are strong because, in many cases, they are signing contracts in the millions of dollars. The nature of that online engagement is different from a B2C environment.
 - b. Furthermore, there is a difference in the tone of conversation. B2B communities are more professional, which lends itself to a level of professional conduct (less abuse complaints relative to a B2C environment that can hide behind anonymity).

BEST PRACTICES

1. Always Work on Engagement Through Executive Support

Maintaining community engagement is a continuous challenge for all organizations. J.J. stated that he has seen the ebb and flow of that engagement change with executive support. Over the years, CA Technologies has sometimes had executive VP support, but due to various organizational changes and new executives coming in, that has morphed a little over time. However, they do have varying levels of support across the business units. Fortunately, they do have the support of many of their general managers across their six lines of business and then several other supporting organizations.

Initially, J.J. and Sam used to have to beg for the opportunity to have a 15 minute phone call with these GMs to let them know what was happening. However, now that they have completed the communication ramp up over the past two years and implemented Jive, everyone is now paying attention to the communities. Interestingly, this can be a double-edge sword. Since everyone is paying attention to the communities, without a full, top-down message from the C-level, it poses a challenge because the different GMs are trying to flex their muscles in different ways based on various requirements.

For example, if the GM needs to drive his/her line of business to increase growth or it affects his/her bonus or staffing numbers, all those challenges come to light. This results in everyone having their own opinion as to how to manage a community. They are at the point now where they are working to get back to that top-level consistent messaging.

2. Use Syndication Methods to Increase Viewership

One participant shared that in her experience, LinkedIn and Twitter help drive viewership when she posts content teasers. Viewers may not be members, but they view the content. J.J. stated that they also do some syndication.

3. Learn How to Measure Community and Maturity

Hillary asked J.J. and Sam to speak to the measurement of community and maturity, particularly the Spider Graph (which has since been adopted by TheCR):

BEST PRACTICES, CONT.

- a. J.J. stated that as they were revamping the program after one of the leadership changes to answer the inevitable “value of community” question, they came up with a way to answer this visually. J.J. is a fan of TheCR’s Maturity Model. It has an effective breakdown of the different areas needed for measurement.

Another favorite is Nancy White’s Spidergram visual. Nancy uses a visual representation to determine how to present a holistic picture of the top-level overall community and how that relates to individual communities within the space. J.J. believes that it is a great graphical image that helps highlight the areas on which the community should focus.

- b. J.J. stated that they use the different competencies from the Community Maturity Model to detail what these competencies mean to them in order to arrive at a more exact definition. As the layers are peeled back, it helps to highlight the different areas that need work.

J.J. uses one-page definitions of each of the competencies and rates them from one to ten within the Spider Graph to show that this is what, for example, a rating of four means and the steps that are needed to move up to a rating of six. The primary objective is to use these Spider Graphs as conversation starters.

- c. Sam added that it also helps them to compare apples to apples. A smaller community with strong leadership and culture, but small numbers and not very much content, might actually be a healthier community than a large community with the volume, but no strategy or an appropriate engagement level from community management.

LESSONS LEARNED

- In addition to executive support, J.J. believes that persistence is another key ingredient for growing a community. He recommends the book: *“Endurance: Shackleton’s Greatest Voyage.”* This is the story of Ernest Shackleton and his expedition to the South Pole and how the team managed to bond and navigate several challenges as they went through a multi-month journey to return to civilization.
- Participants discussed the pros and cons of open and closed communities:
 - Sam shared that they have a B2B community that is a completely open community for the most part. The reason for that is that there is a lot of technical information provided in that community. If it was behind lock and key, it would not provide the traffic from Google and other search engines. After a couple of surveys they discovered that 9 out of 10 of their customers would search Google first. Therefore, they flipped it around and changed the transmission of knowledge out. When a question is answered on the forum, it ends up with quite a life outside of the community.
 - This can be good and bad. The good thing is that it improves self-service immensely. The negative part that Sam and J.J. have been dealing with is the concern for competitive loss. In the end, Sam believes that transparency and openness is a better way to build trust than protecting these things through a customer-only situation.
 - Another participant shared that he sees the need for a balance due to the competitive concern. His last community was completely open. They had to keep it open because their products drove a lot of traffic through Google searches and engagement. Therefore, it necessitated that they defaulted to the open platform as a result. It did build a much more robust scenario. In his new community, he plans to start off with a private section and then move to the competitive discussion because he agrees that searchability is a must.

A tech person will search Google to find out how to fix something and if that does not take the person to the community or list of potential solves, then he/she will call in to the support center. That will lead to the need for case deflection, etc. One participant suggested trying a private pilot project as a way to test the waters.

LESSONS LEARNED, CONT.

- J.J. was asked to discuss the cultural adoption of communities for engagement at both the executive level and the rank and file level
 - First off, J.J. reiterated that one of the ongoing challenges is executive engagement, buy-in and support. Given their brand history, staff are very guarded and closed. It has been a significant challenge helping them to understand that being open, honest and transparent, adding a human factor and authenticity in the communication with customers vs. a strictly a crafted message is actually beneficial.
 - One participant asked if they use internal guidance and training. This is something that has been effective for this participant, particularly in the areas of cultural tone and legalities. J.J. replied that he hosts multiple sessions a day with different teams. One of most difficult challenges is engaging the entire organization because of the need to craft the content to the specific areas. They have to use the "What's In It for Me" principle, which adds to the complication of tailoring the training to each area.
 - Relationship building is a big part of this equation. Accordingly, they do not even look at membership as a metric anymore, except when they look at participation ratios. J.J. would rather have a small community that creates a ton of content than a community of 2000 people with no activity. That can be a difficult concept for the executive to understand. This was one of the reasons that J.J. and Sam wrote this book.
- One participant asked if they are using the community for call deflection or support ticket deflection and whether or not that helps with the ROI demonstration. Sam replied that for each group that they get involved with as an internal stakeholder, they typically want to use one type of measurement as their goal. For support they use Q&A.
 - J.J. and Sam are trying to be as straightforward and simple as possible. They stepped back to leverage the out-of-the-box system for questions vs. answers and created a rate of answering, i.e. the ratio between the numbers of questions that came in during one month compared to the number that were answered, which is tracked over time. Different groups have different goals.
 - One member replied that what she likes about this is that the specific groups set their own terms of success and the community management team does not shoulder the responsibility of success.

ROUNDTABLE SUMMARY

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ADDITIONAL INSIGHTS

Hillary asked participants to share their current challenge.

Participants offered the following:

- Reporting.
- Registration and participation rates.
- Creating a community from scratch, finding the appropriate software to help it all run smoothly and tying it all together with exact metrics worthy of reporting.
- Getting and retaining executive sponsorship and internal buy-in and engagement.
- Moving from an external community manager to an internal community of practice manager. The first order of business in this move is a content audit, which is a huge challenge for this participant.