




Who's Measuring What? A Metrics Show and Tell with Allison Brotman

 SNAPSHOT
SPEAKERS Allison Brotman, nCino, Hillary Boucher (TheCR)
COMPETENCIES Metrics and Measurement
MATURITY PHASES CMM1, CMM2, CMM3, CMM4

HIGHLIGHTS

1. **Interested in learning what Allison considers the biggest factor behind their success?** Members were impressed with how well Allison was able to tie community to the business goals and this success factor is at the heart of it.
2. **Looking for a 3-bucket approach for distilling community trends and behaviors?** This simple approach helps Allison and her team to share the behaviors and trends that align to the community and to the business goals.
3. **Want to know which key metrics Allison uses to report to her executive team?** Allison shared three metrics that help tell her community story in numbers. Executives relate better to numbers.

OVERVIEW

- **Background.** Allison leads the Community and Content Team at nCino.
 - nCino is the world-wide leader in cloud banking. It's a technology product built by bankers for bankers.
 - They streamline all the customer and employee interactions at a bank on a single, cloud-based, Salesforce platform.
 - nCino is the #1 ranked commercial loan origination system. They've also received awards for best place to work (twice) and the API Award from Salesforce for top partner.

CASE STUDY – nCINO

- **nCino Community.** nCino recently made the transition to a Lightning community within Salesforce. They do not use Salesforce Marketing Cloud, but do use Pardot.
 - Members consist of bank employees of all roles, as well as nCino employees.
 - There are approximately 10,000 members.
 - Their system integration partners are companies like Accenture, PWC, Deloitte Digital, etc.
 - They are a customer success community, but also a hybrid in that they have their own centrally-located community for employees, along with partner enablement.
 - They use standard Salesforce permissions and profiles.
 - The community consists of 23 active groups.
 - They average 49,000 keyword searches every month. Approximately 90% of those searches are successful, i.e. they successfully deliver the content users look for in their search requests.
 - From the start it was very important for them to define their shared values and their community mission with customers and users. They worked with top users across four items: accessing technical content and support, facilitating self-service, establishing idea and best practice sharing and then providing insight into customer product expectations. These four items act as the community compass.
 - Internally, they worked with the leadership team to build the culture that supports the community mindset. As a team they focused on building relationships with their users. They have what they call “a daily investment,” which translates into monthly, quarterly and annual goals for every team member related to knowledge sharing and the community in general.
 - They also define what community isn’t in order to stay focused, particularly as a young start-up company.

- **Community team.** The team is lean and mean. There are 14 full-time employees.
 - Eight are technical writers who do not really work in the community. Their content is distributed through the knowledge base for the community.
 - The community is led by one manager and one administrator.
 - They have a very modest budget. Regardless of that, they have accomplished amazing goals.
 - They partner with their IT team internally to develop and provide the system administration for community. That said, once Salesforce is fully enabled, the IT load is light. For the most part, the team can handle what is needed from a development or administrative perspective.

CASE STUDY – nCINO, CONT.

- **The benefit of one platform.** Allison feels that this is the biggest factor behind their success from a reporting and metrics perspective. They have one platform for customer relationship management, one platform for implementation and professional services and one platform for customer success and support, whether that's case management or change orders.
 - Their product is built on Salesforce. As a result, they can utilize Salesforce Analytics. Their knowledge base, partners and community are all on Salesforce.
 - The executive team was adamant from the beginning that they utilize one platform. The saying within the company is: *"If it's not in Salesforce, it didn't happen."* As rigid as that sounds, it helped the team to learn how to report and connect data points and form relationships from data points that they might not have thought to do otherwise.
- **Good, better, best metrics approach.** They focus on community trends and behaviors and post them internally. They recognize the benefit of sharing the behaviors that align to community and business goals.
 - In the Better Column, they measure where users go on the first page of community, as well as the number of searches and the actual key word that they're searching for, what's successful, what's unsuccessful, which events members are registering for but not attending and/or registering and subsequently attending.
 - They measure the number of requests that come in for product demos, all within the community.
 - What is "best" and where Allison focuses her time for the executive team is where she can link community usage to business level outcomes. For example, feature adoption on their product, revenue generation, improved customer satisfaction and then reputation. They have seen people move from role-to-role at different financial institutions based on demonstrated leadership in the nCino community. At the member's individual financial institution, he/she is moving up the ladder within the financial services industry. Those are great success stories to share.
- **Metrics.** Allison discussed the specific metrics that they focus on, which are likely different than other companies.
 - **First response rate and case deflection.** These metrics are shared with the support team. This is all standard in Salesforce.
 - **Tracking of content campaigns.** This is a unique metric. Allison feels that it is a metric that others could take advantage of in their communities.

CASE STUDY – nCINO, CONT.

- They build and track several content types - blogs, relief notes, etc. They use Salesforces' Pardot campaign functionality. For example, they link to a content asset that either lives in the community or it lives in their knowledge base. They embed a video and track the views of those videos. They then close out that content piece with a call-to-action, such as asking members to complete a form, request a demo, etc. All of that is tracked through Pardot.
- **Content campaign tracking example.** Allison highlighted their April Spring Release Campaign.
 - They were able to show the leads that we generated by adopting the new features. Requesting a demo or registering for a webinar are considered direct lead generations from the community.
 - The top middle dashboard shows change orders that impact annual contract value. That starts when a user clicks on content, whether it was a blog, etc. Since everything is on one platform, they can track it. It shows an excellent pipeline of activity that starts in the community.
- **Groups.** There are 23 active groups.
 - The governance model consists of 2 volunteer group owners. In other words, they also have full-time jobs and this is up and above their normal duties. These could be internal or external volunteers. Some group owners are better than others. The goal is to encourage and empower group owners with the right tools and the right messaging, but in the end their success lies with them.
 - From a community team perspective, they provide each group with dashboards. They encourage these group owners to use the information however they see fit in order to increase their group engagement. For example, some group owners use these to welcome new group members by name, to honor the top 10 group members at the end of each month, give thanks to people who are giving best answers or attract other subject matter experts.
 - Group requests come to the community manager. He has a set of criteria that he can approve immediately. If the request is more complex, it is reviewed by a community steering committee. This committee is a cross-functional team with representation from product, operations, finance and marketing.
 - They tend to accept requests, but with stipulations. If the group is dormant for too long – more than 90 days – it will be archived. They provide the space, they help set it up and configure it and loan the group a moderator to set them on a path to success. They are strict on the dormancy rule.

CASE STUDY – nCINO, CONT.

- **Best answer concept.** Of the total questions per month, total best answers per month and then total answers per month, it's a standard Salesforce feature for a group owner or facilitator to be able to select the best answer. That's the most complete answer or the answer that provides the best answer from a business perspective. There is a slight variation and they are measured differently.
 - 60% of the answers come from customers. Customers answer each other's questions more than nCino employees. This has been an exceptional statistic to highlight because of the naysayers in the beginning who said that bankers would never be willing to share due to the conservative, competitive nature of the industry. In reality, they help each other in these groups.

- **Partner enablement.** Banks implement the nCino product and then configure it to meet their business processes and needs. Some of them hire a partner like Accenture, Deloitte or PWC to implement nCino or even to augment staff roles. Accordingly, there are partners in the community who support multiple nCino implementations. These partners use the nCino online university for certification.
 - Engagement is then measured and reported back to the relationship managers.
 - Each partner has a health score made up of community, project performance and customer satisfaction.

- **Reporting to the executive team.** Allison is in the fortunate position of being able to meet quarterly with her executive team. For the most part, she sets the agenda.
 - **Use numbers to tell your story.** nCino celebrated their 2 year anniversary in the beginning of 2018. In preparation for that, Allison and her team compiled data that enabled them to tell their story in numbers. It's exceptional data that she never would have been able to gather without the connection to the CRM, product usage data or contract/finance data that lives within Salesforce. It was an amazing way to show business outcomes.
 - **Engagement by asset band.** Allison learned how to configure this number to prove that it wasn't only the small banks that were using the community. Executives thought that only those banks without the sophistication to do this on their own would participate, not the enterprise banks or larger financial institutions. This metric debunked that assumption.
 - **Total engagement by account type.** This shows the actual number of customers vs. the actual system integration partners. It's all standard with Salesforce and a very powerful statistic for Allison's team.

CASE STUDY – nCINO, CONT.

- **Engagement by role.** Another common misconception was that the community would only be used by technical users, i.e. people in the nCino admin system for the bank. However, in reality, it only represents 200 people. By configuring an engagement by role stat, Allison is able to show that decision makers and executive sponsors are engaging end-users. This is how people at the banks up-sell. They are exposed to new features and use them to sell upgrades.
- **Business outcomes.** Allison shared some of their most pertinent business outcomes related to the community:
 - **Enrolment.** 74% of nCino’s total customers opt-in to the nCino community. It is not mandated and/or customers are not automatically enrolled. This is an amazing, winning stat considering that no one thought bankers would be willing to share in a community.
 - **Relationship between activity and contract value.** They aim to show the relationship between active community use and contract value. That’s the sweet spot for business; the annual contract value. Active is defined as logging into and engaging in the community within the last 120 days. What they found was that the clients who spent the most money were also the most active. According to their total ACV, 93% of them were active in community. That represented \$75 out of the \$80 million total ACV.
 - **Product.** They have been able to show that community users adopt more of their products than non-community users. There were even trends that showed that community users were more forgiving and more patient with new product lines or more immature product areas because of the community relationship. Furthermore, community users adopted more of the product than non-community users. To prove this they used a control group, i.e. customers who did not use community vs. users who did use the community. Salesforce provides all of this data.
 - **Total opportunities influenced by campaigns.** Salesforce provided a data point that wraps up all the yearly campaigns and what those campaigns totaled in business value. Again, having one platform is a huge advantage because all the data lives in Salesforce. As long as they can figure out how to poll the right fields and prepare the reports and have them validated by their data scientists, they can pull the data from Salesforce.

LESSONS LEARNED

- There is an absolute technical advantage to using only one platform. Allison is able to connect user behavior in the community to change orders that drive annual contract value. The executive team loves that data.
- Members are not required to fill-in their role when they join. However, nCino's relationship managers and/or engineers fill in those gaps, as well as contact information to ensure Salesforce data quality.
- In the first 6 months, engagement was only 6%. Then it grew to 60%. Employees were the first to answer questions in the community. Then for the one-year anniversary they rolled out a Community Champions program using their top contributors. This program was a definite trigger for increased engagement.
- Participants were impressed with how Allison was able to tie metrics to business outcomes. Executives now see community as part of the nCino competitive advantage.
- Looking forward, the focus will be on their ability to scale, translation capabilities and localized metrics. Everything that has been discussed in this call is an aggregate for the community in total. Next is the ability to separate it by geography. To help with this, Allison's team will grow by 3-4 people in 2019.
- Allison was asked if being a private, gated community has helped her hindered her success. Allison shared that they weighed the pros and cons and decided to remain a private community. They wanted members of the community to be nCino customers. Prospects are willing to sign legal documents just to be able to go in and view the community. nCino won't hand over direct log-in capabilities.
- Allison is very happy with Salesforce, but does believe that it is still in its infancy. For instance, the fact that their Lightning tool doesn't have Ideas or a blog is a big gap. Allison works with Salesforce and continually advocates for it to be part of their standard package.
- Allison was asked about the ease of creating reports in Salesforce. She stated that it does take some trial and error. It's necessary to understand the data points and where they are stored, as well as the whole data model before you can put it all together in a report. As a result, not all reports are created equally.
 - Allison's community administrator spends ¼ of her time on reporting. She validates that the current reports are pulling correctly, builds new reports based on Allison's requests and refreshes the data quarterly prior to Allison's meetings with the executive team.

ADDITIONAL INSIGHTS

- Participants were asked to share their favorite stats:
 - 10 most popular sites by site hits in the community.
 - Value-added activity and value-gained activity.
 - Highest viewed pages and content within an internal intranet.
 - Case deflection in a support community.
 - Year-over-year activity and answered questions in order to move towards case deflection, also in a support/partner community.
 - Response rate and resolution rate for a support community.
 - ROI and peer-to-peer engagement.
 - Activity levels and top content in an external-facing community.

RESOURCES

- As mentioned in the chat: <https://bit.ly/2K6HFQQ>