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Rigorously Making the Case to Continue Funding a Community Program

📷 SNAPSHOT

SPEAKERS
John Day & Laura Creighton (IEEE), Kelly Schott (TheCR)

COMPETENCIES
Strategy

MATURITY PHASES
CMM3, CMM4

TAKE AWAYS

1. **Do you need to put together a business case in the near future?** John and Laura shared 8 best practices.
2. **Interested in learning what John's AHA moments were in this journey?** John shared 2 important revelations.
3. **Curious about John and Laura's biggest lessons learned?** Four key lessons were shared.

OVERVIEW

➤ **Background IEEE.** IEEE is the world's largest technical professional society. They serve 4 generations over 150 countries. Half of their members are outside of the US. They serve an even broader community of non-members via 400 annual conferences and 1000 active standards that are used in industry.

➤ **Background John Day:** John is the Director of Member Products and Programs. He began his career with IEEE in the standards division heading up their online service. He joined membership about 15 years ago in a series of different stints, most notably launching an IEEE web portal, an Internet broadcasting service, overhauling membership marketing and supporting their membership development team with a new venture called IEEE Collabratec.

➤ **Background Laura Creighton.** Laura is the Director of Society Programs and Audience Engagement at IEEE. Laura began at IEEE by working on their periodicals and other products. She then became involved with engagement and

CASE STUDY – IEEE COLLABRATEC

➢ **Collabratec.** This is IEEE's community and collaboration platform. It was developed internally. Initially, they were heavily integrated with Google Groups. However, through some business decisions made by Google, they felt it that wasn't the best decision to depend on a third party provider.

- This is a pretty extensive investment for the organization. It is an open platform for all to use, but includes exclusive benefits, tools and perks for members only.
- It was conceived a little over 6 years ago as the genesis of a couple of major activities. In the membership division they wanted to add collaboration capability and a community to their personal IEEE portal. There was a big merger in the publishing industry and IEEE needed a collaboration solution for its publishing side. Rather than have 2 separate collaboration activities, they embarked upon a common community feature set that could be utilized by different businesses.
- In November 2017 the board requested a comprehensive business case to continue the program. They had to present this in June of 2018. Even after presenting, the board still wanted additional information prior to approving the budget. After a comprehensive assessment, they successfully defended a continuance of the program due to their business case.
  - o Bear in mind that while part of the team was pulling together the business case, they still had to keep all of their deliverables on schedule. The biggest deliverable was to ensure compliancy with the GDPR regulations as far as online privacy and integrating their IEEE member directory, implementing a collaborative filter and a recommendation engine.
  - o It was a frantic year to keep the momentum going all the while not knowing if they would be shut down. Fortunately, they all pulled together as a team and decided that their best shot at survival was to deliver on their commitments, most importantly GDPR compliance.

➢ **Audience.** Laura explained that they presented their business case to an audience of electrical engineers and software engineers who, by virtue of their professions, would look at any platform that they chose with the belief that they could do it better. It was an incredibly difficult audience to face.

- John added that one of the most difficult points to make was why they should even do this since it wasn't their core competency as an organization. However, as they proceeded to make the case, there were some huge security issues that occurred with one of the large social networks. This helped punctuate the message for privacy. The trend in the industry is that you can't own your future unless you own your engagement data. That became much clearer as they proceeded to make their case.

BEST PRACTICES

- ➢ **Pick the right team when planning your business case.** A conscious decision was made to choose a small team of 5 people. They were a cross-functional team across various departments who had both the business perspective, as well as the technical perspective to develop the business case. They also hired a consultant who was quite familiar with the space and had extensive personal experience.

- ➢ **Define the community's strategic contribution to the organization.** They asked themselves these questions: What is the function of this community? How does it support the organization's objective? What are the metrics that they should be holding people accountable to that align with the mission of the community platforms, but also contribute and align to the mission of the organization? Fortunately, the answers to these questions became clear after John and Laura attended TheCR's Workshop on ROI for Community.

- ➢ **Articulate the ROI model.** It is important to frame and articulate the ROI model. Recognize that similar to the representative communities, ROI has several KPIs. There isn't just one.
  - They learned early on through their own mistakes that metrics such as likes and shares and repeat visitors, etc. indicate velocity and motion, but motion isn't necessarily progress. Numbers are only numbers unless they can align with the goals of the organization.
  - They spent a great deal of time defining KPIs that would demonstrate the true essence of the program. This meant reach, the ability to outreach to audiences whenever they wanted to, engagement and still remain in compliance with GDPR.
  - They implemented a knowledge graph. Collabratec has a collaborative filtering index that takes all the pulses of engagement. They use that to prepare recommendations for what they can offer.

- ➢ **Understand shared value and shared purpose.** John highly recommends TheCR's ROI Workshop, which is how they adopted the concept of shared value and shared purpose. The challenge they face at IEEE is that that they serve many masters. The members are one facet, but they really are a confederation of many different organizations internally. They have 39 technical societies, 300 sections around the world and 3000 student branches. For shared purpose and shared value, it's not a typical B2C relationship. Therefore, they modified the concept to make it work for them. They applied the same methodology and recognized that their purpose was to promote collaboration across the organization.

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BEST PRACTICES, CONT.

- They not only wanted to break down the silos, but also wanted to promote a fluid exchange of perspectives around the world or among constituencies and then a common platform and support tool.
- Another rationale for why they opted to develop this internally was to remain in control of their destiny. They weren't dependent upon third party providers and they could customize the community experience to the business rules of the organization.
- The shared value was the ability to get to know people better. As an organization, IEEE is very mission-driven. The question was how to apply this community concept to advance that mission.
- There was no shortage of items that people wanted to put on these lists of shared value and shared purpose. The challenge was narrowing it down to a reasonable number. Stay focused.

➢ **Show the data as actionable.** For their business case, they had to make this a priority and mash up traditional software packages for data collection. They used Google Analytics with demographic information based on accounts. By the time they had their big meeting with the executives, they were only able to pull a week's worth of data. However, it was enough because it demonstrated that they could pull the data. Looking at the demographics of their users, they could pull breakouts by members or non-members, volunteers or staff and readouts on their usage.

- It is an arduous task to pull this data together, but once you have it, it's an asset that only your community can provide. John often points to this market and customer intelligence as a differentiator and a reason to go with their own platform vs. a third party provider.

➢ **Tie the data to your business objectives.** As an open platform, Collabratec is able to convert non-members into members. Therefore, they keep a close eye on the monthly trends. Don't wait until the week before you're asked to make your business case to pull together all your numbers.

➢ **Be creative and think of this as a journey map.** By the third year, they were able to show retention. They wanted to know what that percentage was and then compare it to all of their recruitment channels. Lo and behold, they had a very positive effect.

➢ **Define your success and then align your KPIs with your declaration.** John finally stopped falling victim to data requests and declared what he felt to be the business results and the platform features that helped him define those results. This was incredibly effective. Now John just goes straight to the bottom line, which is retention and recruitment and whether or not it is going up.

LESSONS LEARNED

- The data you have isn't necessarily the data that you need. It's an arduous process to get at the data. The first step is to go back to your KPIs.

- Establish the annual goals, align with those KPIs and then after the business case approval, report progress against those KPIs consistently and regularly. This way there is no confusion about where you want to go, what you are trying to do and how you're measuring your success. This is really important.
  - It's up to you to measure your success. If you don't define your success and KPIs, the rest of the organization will do that for you.

- Likes, impressions, shares who cares? Those are the vanity metrics that many use for engagement, but they are really superficial. The real trick is to figure out how to get at the true engagement data and extract that from your community. In the end, it will differentiate your program.

- John had 2 AHA moments when he was able to debunk common myths. There were cynics who thought that the only people who used the platform were staff. The data told them that the staff were the ones using it the least. Another AHA moment was that again the cynics were the ones who said that nothing was happening on the platform because people didn't see posts and discussions. This data helped show that there was a lot of activity taking place on the platform, but it just wasn't visible.

- Rachel wondered what John and Laura's biggest lessons learned were through this journey.
  - John's biggest take away is to take the time to invest in shared purpose and shared value.
  - For John, a couple of transformations occurred. One was recognizing that throughout the whole process, the acquisition of the engagement data really became crystallized at the end with the strategic output of this program. What they learned was that the outputs of the engagement were intrinsic strategic assets of the program. You start seeing the tools and engagement as a means to an end, not the end on to itself. That was another key take away.
  - The second transformation reiterates the best practice above, i.e. to define your success and say what you want to say. Stop being distracted by white noise metrics and numbers. Report on the metrics that matter, not the metrics that are readily available.
  - Laura needed to change her viewpoint on what ROI meant and how to think of it. It took more creativity than she thought it would. It's so much more than just dollars.

ADDITIONAL INSIGHTS

- ➢ **Kelly asked members if they had ever put together a business case:**
  - • **Six members have not yet had to put together a business case and were on the call to learn, 2 members were in the midst of putting together a business case and 3 members have actual experience in this process.**