THECR NETWORK

# (Roundtable) Who's Pitching What? Community Training with Executives Roundtable Call

SNAPSHOT

**SPEAKERS**
Peter Broadley (CSA Group) and Binta Dixon (TheCR)

**COMPETENCIES**
Strategy

**MATURITY PHASES**
CMM2, CMM3

## HIGHLIGHTS

1. **Interested in learning how to train executives in community?** Peter revealed his 3 key steps.
2. **Curious about how to deliver this training?** The meat of this training is in the delivery. Peter shared his 4 part delivery system.
3. **Want to know the secret behind Peter's success?** Peter believes that this last step is the big take away that will get executives involved.

## OVERVIEW

- **Background Canadian Standards Association (CSA) Group.** For 100 years, CSA has helped to deliver confidence and peace of mind to manufacturers, retailers and consumers globally. They started off designing standards for railway bridges and eventually evolved to include today's latest sustainability technologies. They continuously develop innovative standards and testing programs for the most advanced emerging technologies.
  - CSA is a standards development organization accredited in Canada and the US. They are represented internationally at ISO and EEC.
  - CSA publishes over 3000 standards and codes and related products in over 50 areas of technology. There are a wide range of industries that they serve, including electrical and gas, healthcare, construction, the environment, power generation and delivery to name a few.
  - With such a wide group of stakeholders, ensuring that standards work for people and business requires a community.

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## OVERVIEW, CONT.

- **Background CSA communities.** Since 2013, CSA communities have grown to nearly 100,000 users, including 9500 community members. The community connects members, stakeholders and all users of standards around the world in an open environment.
  - CSA continues to invest in community to help retain, grow and diversify its membership, as well as improve and simplify the standards development experience for everyone.
  - When speaking to executives, Peter ensures that he talks about the community's shared purpose, volunteer members and staff who work together to continually improve the member experience. The value in return is strengthened communication, increased efficiency and improved transparency to the standards development process through collaboration.

- **Goal.** To create a hub for standards development where CSA can connect, engage and collaborate with its members. Again, this is a point that Peter hits home when speaking to stakeholders about community.

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## BEST PRACTICES

- **Learn how to train executives on community.** Peter shared his key steps:
  - ***Identify and schedule time.*** Peter makes sure that as least some of the following are completed:
    - **Identify the most receptive individuals first.** This would include the people you feel would be enthusiastic about learning the benefits of the community, who will get onboard and who will actually participate.
      - Existing relationships are a good start.
      - New hires are good, as well, because they don't have any expectations from the community and you can start fresh with them.
      - Peter would like to integrate this into an onboarding process, but he still needs to have further conversations with HR to make that a reality.
    - **Check their community activity.** Look at the individual's profile to see how complete it is, whether or not they have a picture and whether or not they have completed any of the additional fields. As context for the presentation, the CSA community uses Jive.
      - **Community profile.** Check out their recent activity to see if they have posted any content or interacted with others.
      - **View recent activity.** Check to see if they follow others and/or have a lot of followers.
      - **Check the leader boards.** If gamification is enabled, you can check the point totals to see if they appear on the leader board. In the CSA community, they have onboarding missions to help them get up to speed with the community.
    - **Use a message template and send an email to the chosen member.** The template outlines the following in the message:
      - That the session will be no more than 30 minutes. People are more apt to agree to a session with a set time limit. A maximum of 30 minutes allows for a casual conversation and won't overload the member with too much information. *See link to template in the Resources Section.*
      - The point of the email is to remind them what the session is and to make it easy for them to keep tabs on the community, reply and provide updates.
      - It also outlines how the session will help them to configure their account properly and point out key places and groups.

- A mobile app is a must-have for this group. The template points out that the session will help them get set-up for mobile.

# (Roundtable) Who's Pitching What? Community Training with

## BEST PRACTICES, CONT.

- **Beware of the key master.** The key master is what Peter calls the executive or admin assistant. So, depending on what level you are trying to reach, make sure that that person understands the purpose of the session. If you are arranging the session directly with the executive, that's even better. However, since that's not always possible, make sure that his/her assistant passes along the true purpose of the session lest there be confusion and/or disappointment when you arrive.

- ***Deliver the session.***
  - **Outline the training session for executives.** Each of these steps is approximately 10 minutes. Some sessions will go over the 30 minutes if they have a lot of questions, but the idea is to respect their time. If they choose to go over the allotted time, that's their choice.
  - **Level set with an intro slide deck.** These are the slides that Peter used in the beginning of this presentation, i.e. outline shared values, benefits, etc. to help them understand what the community is all about and some basic statistics.
    - Help them to understand the business drivers. Specific to CSA, the reason they started the community was because they had low member growth, they wanted to engage members, improve the member experience, increase awareness of standards and improve time-on-delivery for developing standards.
    - Highlight the benefits of participating in the community, such as staying informed, it's an easy way to recognize members for contributions, it gives visibility to other parts of the organization, it reduces travel costs, it deflects costs from the sales queue, it increases brand awareness, etc. Help them to understand why they and/or their staff should participate and "what's in it for them."
  - **Profile configuration.**
    - Make sure their profile is complete. Help them to at least have an avatar or profile picture. Help them to fill out the fields that will help them to network in the community and/or help them to be searchable in the community, i.e. the bio fields and expertise fields.
    - Help them to follow the appropriate groups and/or people.

- Peter ensures that their email updates are turned on so that they can follow the necessary people and places.
- Help them to install the mobile app, if applicable, and show them how to use it on their phone.

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## BEST PRACTICES, CONT.

- **Show them how easy it is to participate.** The idea is to show them how to fit community into their busy schedule. By doing easy things and making it mobile friendly, it makes it more palatable to get involved. Peter also uses status update templates and blog post updates to make participation as easy as possible for them. Templates are incredibly helpful.
  - Community is a way to recognize others.
  - Community is a way to help celebrate the launch of new events. In CSA, it would be a new standard. People can post a status update, tag people, etc.
  - Community is a way to provide updates. This is a little more advanced. It could be done in a status update. If they are really eager and have a lot to share, it can be done in a blog post. Depending on the knowledge and comfort level of the executive that you are coaching, a blog post may be appropriate. However, understand that it will probably have PR's eyes on it. If the executive doesn't write the whole blog, a good part will be written for them. You might have to be the middle man.
  - Community is a way to ask for feedback or start a discussion.

- ***Follow up.*** This is the big take away and will help you to get the executive more involved in the long run.
  - Keep an eye on their community activity either by following them or creating a custom activity stream.
  - Peter tries to follow up after 2 weeks. One week is not enough time. Look at their activity before and after the session to see if there has been any improvement in participation. If so, the session did have an impact and they understood what you showed them.
    - Ensure that you encourage them by liking the posts or comments that they make.
    - Be sure to back channel this, as well. If an executive posts something, Peter or some of his part-time team members will share links of the post to others to help increase engagement.

- It's all about making the executive look good. If you make an executive look good in the community, they will be happy and be more inclined to continue to participate and that's a huge win.
  - If they haven't been active, reach out and ask if they have any questions or need any further assistance. If needed, you can offer a follow up session.

## LESSONS LEARNED

- Peter has been following this program for about 2 years now. It is very rewarding, but you have to stick with it. It might be difficult to get on someone's calendar at first, but as long as they understand what the session is about and what they can get out of it, it will be much easier to get them on board.

- Peter recommends archiving all the welcome emails to keep tabs on the new hires. Then he can approach the new hire and give him/her his community elevator speech. The new hire has a lot to deal with in the beginning, but Peter finds that it is still best to talk to them early on in their tenure.

- If you are not sure how to approach someone, try to find someone else that you know who has an in with the executive. For example, another executive that you know who can introduce you.

- Always present in terms of benefits and how community can help the executive to solve a problem.

- If an executive exhibits an unwanted behavior, it is a fine line to try and correct. You don't want to discourage him/her. Fortunately, Peter hasn't had to deal with this situation. However, at a Town Hall Meeting, one of his executives said something to the effect of "I always try to do things that help me get out of my comfort zone." Peter used that as an opportunity to present community as a way to get out of his comfort zone. It's been 3 years and he still hasn't had that meeting.
  - Peter said that he sometimes has to be careful with the sales and marketing team who may get a little pushy in their sales message, which requires a conversation. He works to help them still get their message across, but not in a way that may turn off members. That's really the only problem that Peter has experienced in terms of unwanted behavior, i.e. the fine line between information and commercial messaging.

- When it comes to re-training executives down the road, Peter doesn't see the purpose changing. The layout and look and feel of the community might change. If that were to happen, Peter would ensure that executives were given the right tools – and hand-holding – to adapt. Peter is working on that right now with the new Jive upgrade. Everyone will have to be retrained.

- Peter was asked for his definition of 'executive training' as it doesn't appear to be all C-suite. Peter replied that he starts at the director level and then goes as far as he can upwards to the CEO. He hasn't been able to get to the CEO, but he has done a level below the CEO, i.e. vice president or executive vice president roles. To clarify, as well, it is the same session for everyone that he trains.

## LESSONS LEARNED, CONT.

- Any and all metrics for the community are set division-wide. So, the metrics for community would go to the division of standards, which is Peter's C-suite representative. Beyond this position, the corporate side doesn't have any community metrics attached to performance.

- Binta agrees that 'gate keepers' can be a barrier to reaching the executive. She asked Peter for his advice. Peter said to be patient and try to make it as simple as possible for them to understand.

- Peter explained that the impetus for starting this training came about when he was invited into meetings to explain the benefits of community. People didn't feel comfortable talking about community and/or didn't think people would listen to them. Once word started getting around, Peter was then invited to more and more meetings. He started creating programs like a monthly column for new members and created more training materials. But it was a work in progress that Peter learned as he went along. Their audience needs someone in person to show them how community worked for it to click. Giving them a one-page hand-out on the benefits didn't work for them and/or they didn't care. But once they saw it and they saw how easy it was, it clicked.

## RESOURCES

- As mentioned in the discussion: https://bit.ly/30ESqQ6
- Executive Engagement and Communication Resource Bundle: https://network.communityroundtable.com/browse/resource-bundles/executives
- Social Executive Toolkit: https://network.communityroundtable.com/viewdocument/the-social-executive-toolkit