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# (Roundtable) Selecting Platforms: Comparisons, Requirements and Evaluation

**SPEAKERS**
Charlie Cohen (Dataiku), Tammy Eck (NISC), Julie Hamel (Dataiku), and Rachel Happe & Kelly Schott (TheCR)

**COMPETENCIES**
Tools

**MATURITY PHASES**
CMM1, CMM2, CMM3

## HIGHLIGHTS

1. **Interested in the best practices associated with vendor platform selection?** Read on for two first-hand member experiences and an overview of TheCR's Community Technology Framework.
2. **Want to know Rachel's recommended best practices for vendor selection?** Ten recommendations were offered.
3. **Looking to learn from other member's experiences?** Six highly valuable lessons learned were shared.

## OVERVIEW

➢ **Background.** Kelly asked 2 members with previous experience in platform selection to start off the discussion:
   • One participant has a brand new initiative to launch communities. They have the forum today, but there is no real ownership or strategy. This participant's group was brought in to make it happen. They just completed their vendor platform evaluation and are heading into implementation migration.
   • From the same company, this participant helped a little bit with the evaluation process and helped launch their community efforts through various initiatives that they are getting off the ground this fall.

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**BEST PRACTICES**

# (Roundtable) Selecting Platforms: Comparisons, Requirements and Evaluation

➢ **Consider game plan #1.** One participant shared her step-by-step game plan:

- *Develop your strategy.* As described by one participant with experience in this area, her advice is to develop your strategy even before the research or platform evaluation. The strategy will help you to have a clear understanding of your goals and objectives. This would include a high-level roadmap, required resources and a budget. This way you will know where you are going and the available resources to support you.
- *Do your research.* The next step is research. Look at different communities within your space and outside of your space to see what it is that you like/don't like and which platforms are used in the spaces that you do like. This will help you to shortlist the number of platforms to review by focusing on the successful elements that will guide you towards the best fit for your needs.
    - o Internally, interview the different stakeholders to understand the internal needs and subsequent gaps. Take those into consideration, as well. This way the focus isn't in a vacuum; the needs of the rest of the organization are considered. This will also help you to get internal stakeholder buy-in.
        - ▪ This is a critical step. It is invaluable to get input on the community vision from others within the organization. This step is ongoing to help you get as clear a picture as possible for what community means to the company and how others can get involved.
- *Interview vendors.* This participant narrowed it down to 3 different community platform vendors. Consider not just the technology, but the provisions offered by the product, as well. Rachel added that this is a huge trigger for having conversations about the community, getting people on the same page and getting them to listen. If you don't think about that opportunity while you're doing this, it becomes a missed opportunity. This focus makes people articulate what they think in a way that doesn't otherwise present itself. It's ancillary to the process, but incredibly critical.
    - o Refine your selection until you decide on one vendor.

➢ **Consider game plan #2.** Another participant described the game plan for her company:
- *Involve internal stakeholders.* This participant reiterated the importance of this step. They involved many people in the process from day one to ensure that everyone in the company was on the same page and had complete awareness of the game plan.

**BEST PRACTICES, CONT.**

## (Roundtable) Selecting Platforms: Comparisons, Requirements and Evaluation

- *Research.* This participant then did research into the various vendors. They narrowed it down to 3.
- *Create a task force.* Once the vendor selection was reduced to 3 vendors, this participant's organization created a task force to identify all of the key elements that they needed from the vendors. They used ideas from TheCR in terms of analyzing needs and giving each a score. They created a smart sheet to do that so everyone on the team could see it together. They tracked all of this, used sandboxes to test the product, etc. It was clear from the beginning which vendor suited their needs the best, but getting everyone on the same page was a long process because everyone had their own agendas.
    - o Ultimately, they were able to make recommendations to the task force and take it to management for final approval. At this point, they are very close to signing the final paperwork and starting the migration process.

- ➢ [1]**Consider TheCR's Community Technology Framework.** Rachel led this part of the discussion as a preface to the upcoming Solution Showcase Conference. It's a very hot topic in the membership. Rachel wanted to members to think about how to ask vendors the right questions.

    - *Technology needs to be integrated into the overall management piece.* Rachel's background is product management and technology. For a long time within TheCR, they shied away from talking about the technology because they were focused on the management piece. At the end of the day, however, it's the technology that helps you to manage and lead in new ways. More importantly, it's a big part of a community manager's day, i.e. figuring out how to use the technology to get what you want done. So, TheCR realized that technology needed to be integrated into the management piece a little more because it is a natural integration point.
    - *User experience.* Many community managers would come at this problem from the user experience, i.e. whether or not the features and functionalities would work for users. That is not unimportant, but the underlying aspects of that are what actually allow it to happen and be optimized.



TheCR's Community Technology Framework

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[1] Slide 2 taken from Rachel Happe's presentation to TheCR on September 13/19 entitled: *"Selecting Platforms: Comparisons, Requirements and Evaluation".*

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# Comparisons, Requirements and Evaluation

**If you are not looking at this transaction and management layer and the administrative layer underneath it, you are sub-optimizing the user experience. All the features sit on top and if the other pieces aren't working, the user experience is not optimized.**

- o Rachel stated that she is actually working on a second version of this framework and would like to collaborate with members for where to categorize certain points. In the first version, not everyone agreed with TheCR's categories or what mattered the most. The next version will attempt to address the second and third layer.
- *Engagement layer.* This is the layer that enables engagement behaviors. So, how to help people share, connect, ask, explore and the technologies and functionalities under those elements.
- *Management layer.* How to manage content and configurations for integration.
- *Member management layer.* How to welcome and on-board new members. How to understand the member's behavior in order to personalize the experience and get the right information and people in front of them. Ask whether or not it includes links to CRM or its own CRM system so that you can really understand who your members are and whether or not it is integrated with directories for advanced profiles. Also look at billing if ecommerce is integrated in the community.
- *Event management layer.* This is everything that allows you to host programs in your community. Rachel believes that there is much innovation that can happen in this area because right now it's more or less seen as meeting management. There are a lot of events performed in community that could be put into a template, but aren't. They are all manual today.
- *Bottom layer: analytics, reporting.* These are critical. If you can't see at scale the behaviors that you're enabling on the frontend, you're never going to be able to optimize them. The difficulty in getting that data out of the system depends a great deal on whether you can generate value in your community and whether you can optimize your community team.
- *Platform architecture.* This is very hidden. A lot of people don't even think about it. This includes the permissioning and whether it is flexible or rigid. It's security, extensibility and the ease with which it can integrate other technologies within your community. It also includes ecosystem governance, i.e. provisioning of groups and sub-communities, how they are managed and controlled, how they link to each other, etc. It is very difficult to audit if you have hundreds of communities.
- *Scalability.* This looks at the platform and its ability to provision, i.e. video.

# Comparisons, Requirements and Evaluation

## BEST PRACTICES, CONT.

- ***Native integrations.*** The extent to which the technology is consolidated and indexed. This examines how easily the content can be accessed in the platform, as well as how easily the content can be integrated with other content.
- ***Vendor factors.*** This looks at the pricing model. If you don't understand that, your finance team will have many questions that you can't answer. Unfortunately, it is very difficult to do an apples-to-apples comparison of vendors. Get your finance team involved at this stage.
- ***Services and support.*** Is this a technology that will leave you on your own after the sale or are resources available afterwards? Are management, technical and strategic resources available?
- ***Customer community.*** Does the vendor work in the way that they are suggesting you work? If they don't, they don't understand community at the level that they need to understand it.
- ***Thought leadership.*** What is the vision of the vendor? Does the vendor even have a vision for the future? That truly matters because if they don't have a strong strategy for the future, it's hard for you to understand if you will align with them.
- ***Viability.*** There is always a lot of innovation in the community space. That means that there is a risk that the vendor will not be around in a couple of years. Is that something that you can accept? Knowing that answer is crucial. That is a constraint that will potentially eliminate a huge segment of vendors from your selection process.
  - There is no right or wrong answer for any of these points. It's what fits your environment, understanding how your stakeholders feel about some of these points and using that to help guide you in your vendor selection.

➢ **Adopt Rachel's list of best practices.**
  - ***Strategy first.*** Strategy needs to come before technology. If you put strategy first, it will prioritize what matters the most to your organization. It will highlight the behaviors that you most care about. Right now in the vendor space, it necessitates compromise. If you don't know what your priorities are, you won't know what will pose an obstacle down the road.
  - ***Focus on key behaviors.*** This enables you to create use cases to give to vendors to say: "Show me how this would happen in your platform." Then you can compare apples-to-apples so that you know which vendor will resonate with your needs.

## BEST PRACTICES, CONT.

- • ***Measurement before UI/UX.*** Rachel believes that if you can't see what matters strategically, you can't optimize it. If the vendor can't show you how to do that, you'll be flying blind. This will completely complicate the process and call for manual hacks or surveys to measure what you are really trying to get out of the system.
  - o If that measurement isn't easy, it will require many resources and much time. If you have an API that dumps lots of data onto you, you'll need an analyst on the other side or services from the vendor to help you understand the data. That is an added cost.
- • ***Operational and strategic data are needed as well as tactical data.*** What does the vendor do to help you identify this and then easily report it? Push the vendor on this because you need to be able to prove the value of your platform. The better you can do this, the better your resources and funding. This will lead to a more engaged community, meaning the more value you generate overall. Think about measurement first – always. Have a measurable strategy.
- • ***Platform architecture.*** This can be a sore spot if you don't understand how it will impact the user experience.
- • ***Sub-communities.*** How are they connected, provisioned and displayed? If there is an ecosystem with thousands of communities that aren't connected or tagged or organized in some way, it's just a lot of spaghetti on the wall. Furthermore, without a process, communities will start up that overlap other communities. This is an area of weakness for most platform providers today.
- • ***Content integration and indexing.*** This truly drives value. If people can't find all the content in one consolidated space and if it's not integrated and linked in the UX, you will have content holes. That's one of the things that Rachel doesn't like about TheCR's platform. The library is difficult to use and the search doesn't index and rationalize.
- • ***UX and frontend issues are the last piece.*** The reason Rachel puts this last is that the frontend is the easiest to fix. If there is something wrong in the fronted, you can develop a new frontend widget or app as long as the data and architecture are correct. But you can't fix the platform architecture even if you have the right UX. It is very difficult to fix after the fact. If it isn't easy to use, it may as well not even exist. Using testing is very helpful in this regard.
- • ***Configuration and flexibility matter.*** Personalization, especially to sub-spaces, matters. If you don't have that flexibility, it is difficult to have any type of complexity in your space.
- • ***Graphics, avatars and faces make a community personal.*** Without activity and faces and the graphics to make you feel welcome, you will be less likely to feel an affinity to the space.

Evaluation

# LESSONS LEARNED

> **Reflect on these lessons learned.** Experienced participants in this area shared their lessons learned.
> - Look for familiar features that you are comfortable with.
> - Broaden your awareness of other available functionalities offered by the new platform.
> - Ensure full management buy in. One participant said that they thought they had this, but in the end they didn't. There was a break in this communication and it set them back a few months. Make sure that the chain of communication goes all the way to the top.

- It's very easy to focus on the technology and its offered functionalities and features. One participant did put this first, but she stressed that that is only part of the process. It's difficult to compare vendors if you're just looking at the functionalities. A lot of the vendors do the same things. That's why the vendor vision of their product and their ability to support your success is important. What is the vendor roadmap for after the sale? Ask about this so that you don't end up with just a platform vendor, but a partner who can evolve and grow with you.
- Over communicate and make sure that people have access to the information about what you are doing. This is a general organizational truth no matter what you are doing. You might be surprised at how much people want to be a part of the process and are willing to share.
- Be as transparent as possible. If you have the opportunity, centralize your knowledge on a working document or a project management tool of some kind. You can expose that to other people, which not only buys goodwill, but helps people feel like they have a vested interest.
- A task force is very helpful. They can help you in the final selection process. Show the task force a demo of the product from your narrowed vendor list. Talk about the needs of the organization and talk about how each vendor can meet those needs. For one participant, the task force was instrumental in helping to make the final vendor decision.
  - This task force consisted of the security team, support managers and a few external customers. Include representation from all groups who use the community on a regular basis.
  - Keep your finance department and legal department in the loop with decisions made every step of the way. This way there won't be any surprises, delays or pushback when it's time to take action.
  - Rachel added that keeping all these people included in the process will slow you down on the frontend, but it will speed you up on the backend.

# (Roundtable) Selecting Platforms: Comparisons, Requirements and Evaluation

## LESSONS LEARNED, CONT.

➢ Rachel plans to post the framework in the community for feedback. If people are interested, she will compile a working group to iterate on it with her. Rachel is anxious to get this out in the world because she feels strongly that vendors haven't really come to the plate. Technology used to be leading customers. Now, however, technology seems to increasingly be a constraint that holds companies back on their strategic vision. Technology should be an enabler. In many cases, the community programs are ahead of the vendors. Rachel strongly feels that we need to take an advocacy approach and ask the vendors for what the field needs in aggregate in order to develop technology that meets the needs of communities. Event management is a prime example. Automation of this would be highly valuable.

➢ In the evaluation process, give the vendor your wish list. That is the best way to evaluate a platform because it focuses on your needs vs. the vendor's product features.

➢ In TheCR Network, there are cohort platforms that can help members continue the vendor selection discussions with other members.

➢ There are also CR tools. One is a platform comparison tool and a platform requirements library. Don't start with the requirements library. Start with your strategy and use the library more for context and research. The platform comparison tool is very helpful. For example, if content is important to your community, weight it higher in the comparative factor and see which vendor rates highest.

➢ For the Community Solution Showcase, TheCR is printing out a scorecard where attendees will be asked to rate each of the vendor platforms according to 7 points. This will help TheCR to gauge perception of the different platforms. TheCR will then produce a CSS snapshot after the event. Rachel wants to also gauge if this is an area that is in demand, whether further research is needed and whether TheCR should invest in this area.

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## ADDITIONAL INSIGHTS

➢ **Most participants on this call have been through a vendor platform selection process. In fact, many are actually in the middle of that process currently.**

## RESOURCES

- **As mentioned in the discussion: TheCR's Ultimate Community Platform Evaluation Toolkit: https://network.communityroundtable.com/viewdocument/thecrs-ultimate-community-platform?CommunityKey=dfc8b3de-b5a2-426e-af5e-dfe2eb1465e1&tab=librarydocuments**

- **As mentioned in the discussion: The Community Platform Requirements Library: https://network.communityroundtable.com/viewdocument/the-community-platform-requirements?CommunityKey=dfc8b3de-b5a2-426e-af5e-dfe2eb1465e1&tab=librarydocuments**