



From Preparation to Promotion: A Career Progression Case Study

 **SNAPSHOT**

SPEAKERS

Marjorie Anderson (PMI) & Kelly Schott (TheCR)

COMPETENCIES

Leadership

MATURITY PHASES

CMM1, CMM2

HIGHLIGHTS

1. **Ever wonder what skills are best suited for community management?** Marjorie shared what she believes is the most valuable skill set for community management.
2. **Looking for key lessons learned in Marjorie’s career progression?** Marjorie offered 2 of her personal most valuable lessons learned.
3. **Want advice for moving up with community?** Marjorie suggested 5 tips for helping to make a strong case for community.

OVERVIEW

➤ **Background Marjorie Anderson.** Marjorie is the Manager of Digital Communities at Project Management Institute. The organization is moving towards a more product-centric mindset, so she is technically a Product Manager for Community, but still a Community Manager.

- The community was founded by Marjorie’s former boss, who spent many years building it up to a point where people now understand the value and importance of community. As a result, they do have specific goals for community.
- Since they are trying to become a flatter organization, the product specialist role is what community engagement specialists are at PMI.
- Marjorie leads the team that manages online community. She works to ensure that they are doing proper community programming, engaging the community, working with other parts of the organization to help them meet their goals, and with



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CASE STUDY

- **Leading up to the community role.** Marjorie got her career start in retail and then shifted to call center work. When she came to PMI in 2007, she started in customer care and then moved to back office operations to process memberships. She wanted to stretch herself and applied for a number of different positions before she was successful in a community of practice program in 2013. During that time, the company was going through a change. They were going from 36 individual communities of practice that were member-only to an integrated online community that currently exists today. This was a result of their acquisition of projectmanagement.com
 - Not only did Marjorie enter a profession that was completely foreign to her, she was also moving into a role that would change within a year. That's how Marjorie came into the role of community and she hasn't looked back.
 - As a result, many of the questions she asks about communities comes from her time in call centers. For instance, she'll ask "If I had to make this better, how could I improve?" "How could I be more strategic about managing the community?" It isn't necessarily her goal, but a curiosity.
- **Community's place in the organization.** Marjorie's team sits in an area of the organization called "Global Solutions." They are grouped with membership. They have a portfolio leader who manages the strategy for membership and community.
 - Reporting to Marjorie are 2 engagement specialists who are responsible for ensuring programming and engagement.
 - There is a full time moderator.
 - There is a full time data steward (analyst). He fulfills and interprets data requests and makes recommendations for metrics, etc.
 - There is a content editor and a media associate responsible for video content quality.
- **Skill set.** Marjorie believes that business acumen is one of the most valuable skill sets that a community manager can acquire. Being able to understand the business has so many benefits. Marjorie actually took a certification course at PMI in project management to help understand what PMI does. Kelly liked this as it cements the concept that you need to know the business to know where you fit into the business.
 - Soft skills – such as people skills – are also very important. Fortunately, Marjorie's time in the customer care field served her well to learn these skills.
 - Networking is also an invaluable skill.



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LESSONS LEARNED

- Kelly asked if there was a role or skill in Marjorie's past that helped her to be successful in community management, even though she didn't realize it at the time. Marjorie hands-down believes that it was her call center work because that role taught her how to talk to people, how to engage with them and how to understand their needs in order to help them. She carries that with her now into every interaction she has with people in her community now. Call center work also helped her to learn a little bit about all parts of the business. From that perspective, when you manage an online community, you understand the needs of other parts of the organization and its goals.
- When Marjorie started in the role, her first step was to try and understand the function of community in the overall success of the organization. She was curious to know this because she recognized that they couldn't grow without knowing where the organization was going. Furthermore, she needed to understand member needs. She started to ask a lot of questions and do what she calls "road shows." She would go to the team leads or managers of other departments to ask them what their challenges were and how community could help. That's what helped her to figure out where the bonds were and what the work truly meant. It wasn't just about making sure that customers and members were happy. There is a bigger story that community can tell and connect into in order to serve members better. The idea is to create a virtuous cycle of engagement that will help to create value for members and customers. So, understanding that was Marjorie's priority in order to do the job correctly. It took a good year and a half to be able to truly understand that concept.
- A huge lesson learned for Marjorie was learning how to write a strategic plan. Her former boss used to make her write the strategic plan for the community. Her first pass at it was a total fail - in her words - but it was the best lesson. This exercise taught her how to wrap her brain around what her team's role was and what it was meant to do for the community.
- The next big lesson was managing the budget. Marjorie's former boss also made this a job task, even though Marjorie didn't have any prior experience in this field, either. Marjorie was very fortunate to be thrown into tasks that helped her to stretch her knowledge and skills, even if she didn't think she was ready. Budgeting was exactly that scenario. However, it was another incredible lesson learned.



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LESSONS LEARNED, CONT.

- Marjorie has been fortunate to have 2 exceptional mentors. One is her former manager, which has been shown above. She helped to coach her through her career progression, beginning with management. She gave Marjorie autonomy to make decisions and to connect with helpful people.
 - Her other mentor was a director in the chapter development department. She has been an integral piece in helping Marjorie to see the bigger picture and to understand her strengths.
 - There have been others, as well, who are not necessarily part of leadership, but who have interesting perspectives. She makes a point of keeping these people in her network because their insights are invaluable.
 - Outside of that, Marjorie tries to network with people who are inside the association industry to give her a broader perspective of areas that she should be thinking about when building community.
 - Marjorie believes that it is important to surround yourself with people who are smarter than you. Those people can come from anywhere, inside or outside of the organization and inside or outside of your industry.
- Marjorie was asked if she sought out mentors or if she fell into them. Marjorie replied that it was a little of both. Her former manager urged her to find another mentor in addition to herself because she felt that Marjorie needed a mentor other than who she reported to directly. As for those mentors outside of the organization, they came from her ability to share on LinkedIn, her ability to create her own blog and/or her ability to engage with people. This helped her to partner with others.
 - Marjorie suggests that if you have people in your life who guide you, those are your mentors whether you've consciously sought them out or not. If you are doing the same for others, you are also a mentor. It happens more organically than people think, but because it doesn't always reflect a formal mentorship program, people don't always think of it that way.
- Marjorie explained that she gained confidence in herself when she realized that people began to value her opinion. That said, it's important to realize that no matter how experienced you are – or anyone else for that matter – you won't always have things figured out. It's all part of your journey.



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LESSONS LEARNED - CONT.

- Another member added that it's very empowering to know that when it comes to community, you are the "expert." There may be others in the room who have more experience and more knowledge than you in other areas, but when it comes to community you've been given a seat at the table because you have the knowledge and expertise.
 - Marjorie added that her turning point was when she sat down with a VP to explain her vision of what a community is and what it isn't, what it can be used for and what it shouldn't be used for and it changed that VP's mind. He was going to move community to the content area. Marjorie helped him to see that that wouldn't be a positive move for her team and he listened.
- PMI is exceptional at helping people to learn and grow. However, if this practice isn't a luxury in your organization, Marjorie recommends that you make the case for any training that you want by showing the value of what that new skill will add to the organization. The benefit should come before the "ask" when seeking training support.
- There is a balance between being proactive and reactive when it comes to advancing your career/position. Marjorie suggests assessing the gaps that exist so that you can be proactive in filling them vs. reactive. Don't let things sneak up. If you know you have gaps, address those gaps. However, there are some areas where you will have blind spots. Fortunately, Marjorie's former boss was incredibly helpful in pointing out those areas for her to investigate, areas that she might not have otherwise explored.
- The flip side to this is to be open to feedback. That is incredibly important to your development. Be self-aware and be humble enough to ask what it is you need to work on and be willing to listen with an open mind. Don't be afraid of constructive criticism; embrace it.
- When Marjorie's former boss was promoted to an interim director's role, it created an opportunity for Marjorie to step up to a leadership role, as well. She recognized that there was a gap and that it needed to be filled, so she took it upon herself to do whatever needed to be done to support her team until such time as her boss' position was filled. It helps to take the initiative and it proves your ability to lead.



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LESSONS LEARNED – CONT.

- Kelly asked for Marjorie’s advice on how to move up in community if you’re not really sure if the career path exists in the organization or what that career path might be. Marjorie suggests that the number one step is to make a strong case for your community, whether this is in your current role or whether you are planning to move outside of your organization. If you are making a strong case, the fallout of that is that you will learn what support looks like, what the business model looks like, what the budget looks like, etc. It naturally shows what roles you need to fulfill.
 - When you are thinking about your career path and the strategy needed to get there, think and talk and write in business terms that people will understand.
 - The more that you are helping to execute strategy for the organization or your community program, the easier it is for others to see how you might be promoted or how you might need additional help.
 - It’s definitely more than creating a good strategy around your online community. It’s also about making sure that you’re inserting yourself in such a way as to make yourself indispensable.
 - Be sure that people understand what it is that you do. Be dedicated to putting in the effort. Don’t assume people know what community is and what it does. There are still many, many people who don’t understand what it is that you do and why communities exist.
 - There is no way around it. You will have to put in the work needed to help people see the value of community. It’s hard work and it’s frustrating work, but necessary.
- When it came to learning business skills, Marjorie would take a course and then ask to be put in business meetings and/or to be put on projects afterwards. Insert yourself where you can.
- Once you have a strategy completed and written, share it. Then let them know what the required budget would be to support it and how it will help the organization. Socialize the strategy. Once you’ve acquired the knowledge, applying it isn’t the biggest hurdle. Making sure that you are in the right places in order to apply it is what is most important.
- One of the things that Marjorie would love to do in the future is provide additional support to other community managers, more than she does now. That could be by creating a certification to validate all of the required community manager skills or to create an association for community managers, etc.