



# Letting Go of the Reins: Best Practices for Onboarding a New Community Manager

 **SNAPSHOT**

**SPEAKERS**  
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**COMPETENCIES**  
Community Management

**MATURITY PHASES**  
CMM2, CMM3

## SUMMARY

Participants discussed best practices for onboarding a new community manager. The highlights of the discussion are noted below:

A prominent best practice that was echoed by all was to help the new hire to feel empowered early on in his/her tenure. This helped the new hire to quickly gain confidence and be ready to take on even more in the community management role. Use the following strategies to help this to happen:

- a. Create a training document that includes tasks to familiar the new hire with the community. Brenda, Hillary and Georgina used this as a way to create a playbook.
- b. Allow the new hire to voice his/her opinions and ideas.
- c. Create a culture that fosters camaraderie, collaboration and the ability to bounce ideas off of each other without getting hung up on the organizational chart.
- d. Set up the new hire with the proper guidelines and guardrails so that they can learn, thrive and bring forth new ideas with a safety net. The safeguards will allow for empowerment and to build trust.
- e. Let the new hire know that it is acceptable to make mistakes.
- f. Keep the lines of communication open.
- g. Alert the community to the fact that there has been a transition of duties.

1. Allowing the new community manager to feel like he/she can contribute means stepping back and getting out of the way. That is an incredibly challenging – but necessary part – of letting go. Understand that there is always more than one way to do the same job; it does not make one way right or better, just different.
2. When hiring a community manager, look to the communication skills and other inherent skills. Those skills are not easily taught while other community skills are more teachable.

### Best Practices

The following is a summary of best practices as shared by participants within the discussion:

- Create a Training Document that Includes Tasks to Familiarize the New Hire with the Community: Jeff, Phoebe and Hillary were able to share how they passed the reins to Brenda, Claudio and Georgina respectively:
  - Jeff Ross – Humana: Jeff shared that he and Brenda spent a lot of time together when Brenda first came on board at Humana. He did have a document that outlined the daily, weekly and monthly tasks, but focused a lot of time on side-by-sides to show her how he dealt with issues on a daily basis, especially those items that he did not yet document. This worked well for Brenda, who turned her notes into a playbook.
    - Jeff also helped Brenda set big-picture goals for the next six months to help her prioritize what needed to be accomplished.
    - Fortunately, Jeff was in contact with Brenda prior to her joining Humana, so he was able to share different resources with her even before she officially joined.
      - Brenda added that the documentation that Jeff provided included several pages of daily and weekly tasks and procedures. She felt that this was an early key to success as the document contained all the basics for running Humana’s Buzz Community. The additional benefit was the emotional and mental lift she received when she mastered it. Instead of becoming overwhelmed – which is common in a new job – the documentation helped her to quickly wrap her mind around her new role’s expectations. This freed her up to be able to ask more questions about the community’s culture and the moderating procedures. The documentation made it so much easier to master the basic tasks so that she could feel successful and, in turn, focus on the issues that mattered.
  - Phoebe Venkat – Salesforce: It was Phoebe’s goal to make sure that Claudio felt comfortable with the Salesforce culture and to understand their customer’s needs. As well, she made an effort to learn how

Claudio wanted to interact with the community. Phoebe does not believe that simply throwing a list of “to do’s” at the new hire is necessarily a good idea. It involves a system and a little bit of ad hoc training.

- Claudio echoed Brenda’s comments. Similarly, Phoebe created a document for him with lots of tasks. Going through that list and learning how to do the tasks was very empowering, which left him wanting to learn more.
- Hillary Boucher – TheCR: Hillary also realized the benefits of documentation and created a team resource board through Trello, a web-based project management application. Hillary also created a playbook on Trello using the Community Maturity Model. Hillary started with the processes that she planned to hand over to Georgina. She chose discreet tasks that would help Georgina become acclimated with the tools and the system. For instance, updating the member directory and updating TheCR’s CRM membership so that Georgina could learn about the community and its members while also completing much needed tasks.
  - Community management is all about juggling. Therefore, Hillary started Georgina with one project and when she was able to manage that, she would add another and another. As Georgina became better and better at juggling these tasks, she could add more tasks.
  - Hillary also shared that there is a need to stay connected throughout the day and the week during the training process. This is especially true at TheCR as they are a virtual workforce.
    - Georgina added that she specifically recalls updating the member directory. She found that to be an incredibly helpful exercise because while it was not only work that needed to be done, it offered a great training experience. It required her to not only learn how that one particular resource was handled, but it also required her to access the Network, member profile pages, the CRM and other various administration tools. It also helped her to learn about the members because she had to access their member profile pages in order to document information.
- Help the New Hire to Feel Empowered: Building on the above best practice, participants shared further strategies for helping the new hire to feel empowered:
  - Claudio stated that from his first day on the job, he felt at home. Everyone treated him like family, especially through the interview process with Phoebe. They immediately connected on both a professional and personal level and became friends.
    - Claudio liked that he was specifically asked to challenge the norm by using his background in social. This is Claudio’s first experience in the B2B community space. As such, he took best practices from his professional background, especially his experience with social. Phoebe

emphasized that they wanted Claudio to bring his voice to the table. As a new hire, this felt very empowering.

- Jeff feels that it is very important to create a culture that fosters camaraderie, collaboration and the ability to bounce ideas off of each other without getting hung up on the organizational chart. That allowed Brenda to share her ideas right away, which was beneficial because she was able to look at the community with a fresh pair of eyes. This requires a leadership style that will work to get the right people in place let them loose. Of course, this means setting them up with the proper guidelines and guardrails so that they can learn, thrive and bring forth new ideas with a safety net. This is a fantastic way to bring forth new ideas that might not otherwise come forth, especially as a lone wolf. A lone wolf becomes so encumbered with running the community alone that he/she can have blinders on and be somewhat predictable. That is not a negative statement, just a fact.
- Hillary added that, as difficult as it was to hand over ownership, it definitely helped to create a culture of competency for Georgina to be able to step up and have input across the board. As soon as you can give someone ownership and freedom with a task, that action helps to build a relationship where both people are able to give each other great feedback and share new ideas. Georgina agreed. To be able to call a project – albeit low impact and low risk initially – your own right from the very beginning is incredibly empowering and a great learning experience.
- Step Back and Let the New Community Manager do the Job: Participants discussed this best practice as an incredibly challenging – but necessary part – of letting go of the reins:
  - Phoebe stated that allowing the new community manager to feel like he/she can contribute means getting out of the way. That is very difficult to do, especially as a lone wolf who has built the community. Phoebe shared that she has had to step back and re-train her way of thinking. Instead of just answering questions right away, she took the time to ask for Claudio’s opinion, especially since he was expected to be the new voice of the community.
  - Hillary agreed. She found the need to remind herself to step back if she was to allow Georgina to do what she was hired to do, meaning that she had to let go of how she thought it should look or where she would post it, etc. There is always more than one way to do the same job; it does not make one way right or better, just different.
    - Hillary found this step to be an incredible learning experience, i.e. to watch how someone else interacts with members. It is definitely a two-way learning experience.

- Create Safeguards in the Tasks that Allow for Empowerment and the Building of Trust: Georgina asked the group how they were able to build trust in their new working relationships so that they could have the confidence to unleash their new hires into the community:
  - Phoebe felt that it was about showing Claudio that there was no such thing as perfect; that it was acceptable to make mistakes. She showed him examples of things that she did well and things that she did not do as well. She felt this was better than a “do and don’t do” list, which is too constricting and makes people nervous. All in all, Phoebe feels that it is important to show your own vulnerability as a manager and a leader, as well as the appropriate behaviors.
    - Claudio agreed that that is how he was made to feel, i.e. that he did not have to be perfect. Secondly, he felt a sense of empathy because they both made mistakes. The main thing is to learn from the mistakes and Phoebe shared what she learned from those mistakes. Furthermore, Phoebe was very good at letting Claudio know that there is more than one way to do things and that it did not necessarily have to be the way that Phoebe did it. This was very, very helpful to Claudio.
  - Jeff explained that Brenda was very good about including him in what she was doing and asking his opinion. Sometimes he would change things and sometimes he did not. Even eight months later, Brenda still keeps the lines of communication open. This is very helpful in establishing trust.
    - Hillary added that this is very important – open communication and collaboration, especially since TheCR is a distributed team. Therefore, Hillary suggests it as a best practice to share early and often; never get out of the habit of asking for feedback. Georgina agreed. Although it can be a very daunting culture to enter, it is a good training ground because everyone on the team sees your work – much the same as posting in the community.
- Alert the Community to the Fact that there has been a Transition of Duties: It is very important that the community is aware of the transition of duties. Georgina asked participants to share how they worked through this transition:
  - Along with the initial announcement that Phoebe made to the community both internally and externally, Claudio worked to build engagement with the community. It is a slow process in a community of two million, but it is important to have those one-on-one conversations to help members to know your name. Claudio recommends jumping into conversations where appropriate and be an active member with authentic engagement. Showing authentic engagement will help the user experience to be more memorable.

- Jeff shared that he made sure that all the VPs and directors were aware of the transition, as well, so that they could take advantage of the really involved leaders from different areas of the organization to spread the word.
- Maintain Some Projects within the Community to Remain Connected: Hillary shared a best practice that she has learned is to keep some of the specific projects that keep you engaged in the community in order to stay connected to members. It is very easy to hand over the community and get buried in a strategic focus to the point that that connection with members is lost. Therefore, as an example, Hillary kept the “Working Out Loud” thread within TheCR in order to keep engaged and continuing to post in the Network. Hillary would recommend this as a best practice for anyone who wants to stay connected to the community.

## Lessons Learned

The following is a summary of lessons learned as shared by participants within the discussion:

- Brenda shared that one of the challenges of coming into a community manager role when your predecessor has been the face of the community – someone who is very strongly identified with the community because he/she built it from the ground up – is to overcome feelings of inadequacy. Brenda felt panicked wondering how she could possibly improve upon what Jeff had accomplished. However, Jeff was – and still is – very generous with his support of ideas and truly encourages Brenda to pursue her ideas, which gives her the confidence to continue to build the community by adding her vision to help it move forward.
- On the opposite side of the above, Jeff, Phoebe and Hillary expressed their slight snippets of anxiety when their new community managers were able to do so well. Jeff shared that he quickly learned that there are some things that Brenda can do better and it was in everyone’s best interest to accept that and let it go. It simply means that the community is in good hands, freeing you up to pursue other strategic initiatives.
  - Phoebe added that letting go of the reins was the most difficult part for her. As mentioned, she had to re-train her thoughts. In order to help her with this, she continually reminded herself that the community deserved a fresh voice to infuse new enthusiasm and new ideas to help improve, grow and strengthen it. If you keep the needs of the community in mind, that will help you to let go.
- Georgina asked participants to share their experiences with new hires that are not only new to the community role, but also new to the community management discipline in general:
  - Phoebe shared that Claudio had an extensive background in creating campaigns and running social media properties for different B2C customers, but did not have experience running a B2B community. Phoebe did not have skills as a community manager in her career, either. Therefore, the type of experience was less important than the communication skills. Phoebe was looking for someone who

could rally people vs. creating silos. Communication skills were something that Phoebe was able to assess by following Claudio on Twitter.

- Jeff agreed. He did not have any community management experience when Humana launched Buzz. He was, however, in the right place at the right time on the team that launched it and had an interest in learning. So, he was given an opportunity. Brenda had also expressed an interest in the social media team a couple of years ago. So, they connected online. Brenda had a strong background working for a non-profit organization in a communication role doing their web and social. Jeff knew the general area was a strong suit for her, even though she did not have the exact kind of experience. Again, Jeff was also looking for strong communication skills. Jeff also saw how Brenda handled herself on the various social channels, namely Facebook. This showed him how Brenda was able to communicate and tell stories, all with a sense of humor. These were the inherent skills he was looking for; the other community skills could be taught.
- Hillary added that in her role at TheCR, she works with many community managers and most of them do not have an extensive background in community. There is a group of people who have been doing this for a while, but most people have fallen into it. Hillary believes it is more about a matching personality. There are very successful community managers who have a background in support. Likewise, a project manager with strong communication skills can also be successful. There are reports in the Network that talk about how to navigate an interview to figure out if someone would make a good community manager.

### Additional Insights

Georgina asked participants to share the current size of their community team and whether or not they have had the experience of bringing on a new hire. Participants replied with the following:

- Sizes of the communities ranged from two to seven people.
- Jeff, Phoebe and Hillary have been lone wolves for their community and have also helped hire new community managers to assist them in their roles and/or help them to focus their own efforts more strategically.

### Resources

- As mentioned in the discussion: <https://trello.com/>