THECR NETWORK

(Roundtable) Managing a Migration: The YMCA Story

📷 SNAPSHOT

SPEAKERS
Lisa Tallman & Emily Hatteburg (YMCA of the USA) and Kelly Schott (TheCR)

COMPETENCIES
Leadership

MATURITY PHASES
CMM2, CMM3, CMM4

HIGHLIGHTS

1. **Interested in a tried and tested change model?** Lisa shared the YMCA's 7 step model, the model used in their migration process.
2. **Looking for a step-by-step process for choosing a platform vendor?** Lisa outlined the 6 steps they used to land on MangoApps.
3. **Want to gain insight from Lisa and Emily's lessons learned?** Benefit from 6 hard won lessons learned.

OVERVIEW

➢ **Background YMCA.** There are 2600 locations/branches across the US, 20 million members, many volunteers, and many part-time staff. The national office has 300 staff.

- Lisa Tallman is the Senior Director of Knowledge Management of the YMCA USA. Lisa's team primarily serves the approximately 20,000 full-time staff and 250,000 part-time staff. Though the platform is open to all volunteers and all part-time staff, individual YMCA's control access to the platform. They are a federated organization, meaning that each individual YMCA is its own non-profit.
- They are a national resource office. Each YMCA branch has to meet certain standards, but after that they have autonomy within their own communities. This makes for a complex organization.
- Emily Hatteburg is the Editorial Manager of the YMCA USA, a member of Lisa's team. Before the migration, Emily was focused on editorial and design support at the national office. She put together tools and resources for the staff and volunteers. Now Emily's work is whatever is needed on the platform.
- There are about 60,000 people active on the platform today, some more active than others.
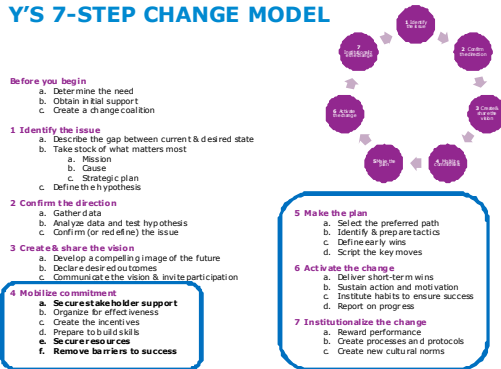
CASE STUDY – THE YMCA

➢ **Team structure.** As mentioned, Lisa is the Director of the team. Lisa reports to the Senior Vice President of Talent and Knowledge Management, who reports to the COO.
   - Lisa has 3 community strategists on the team. They are responsible for engagement within the platform. They work with the approximately 300 volunteer moderators of the communities.

➢ **The vision and its evolution.** Lisa joined the YMCA in 2011 to launch a platform. The position was vacant for 3 years prior to her joining. SharePoint 2010 was pre-chosen, as well as a vendor to help with the implementation. Lisa was hired to make it all happen within 9 months.
   - *Vision 2013.* When they launched in February 2012 with the initial platform, Lisa quipped that they went from being 10 years behind from a technology perspective to 5 years behind.
     - Initially, it was very much a push platform for guides, manuals, templates, resources, etc. There were very few communities. It was more of a knowledge repository.
     - The vision was for more robust online communities, social collaboration and networking. There were many requests for project sites as they work with many planning committees, task forces and local YMCAs.
     - Personalization of the platform was a goal. iGoogle was what existed in 2013 to help members curate their own personal experience at the time.
     - The platform was not optimized for mobile. Another goal was to move from being available on the desktop and laptop and email to digital, phone and tablet.
     - The platform didn't look like SharePoint because they customized it to make it more user-friendly. Since they are a federated organization (they are not employees), they needed to motivate people to come to the platforms. Creating a user experience that fit and was appealing was very important. A lot of time was spent on this step making the platform engaging, as well as making it easy for people to find their desired content.
   - *What they launched with.* In 2013, Lisa started promoting this vision and orchestrated a great deal of education around this vision. Their senior leadership was still very much technology focused. They didn't understand what was needed to build a community, curate content, etc.
   - *The vision didn't change, but how Lisa presented the vision did change.* In 2016/2017 era, the change in language shifted to how they could be a more powerful movement. Lisa coined a saying: *"What would the power of the Y be if we all knew what we all know?"* In other words, how could all the expertise and experience that existed in the YMCAs come together to create a more powerful movement?

CASE STUDY - THE YMCA, CONT.

- o It evolved into what they talk about today, which is a culture of knowledge sharing that contributes to that powerful movement. So, leveraging skills, expertise and experiences so that people don't reinvent the wheel. Instead, they can be more effective and efficient in their jobs within their own communities.
- o It took time to craft this message, but Lisa's advice is to continue to send that message to the executive and to your users. That's the only way to gain funding. That diligence eventually paid off.
- *Knowledge sharing vision.* What they talk about today, particularly in the last few months, is that staff are able to share useful knowledge, they have a safe space to build meaningful connections with each other and to learn from each other in ways that make them all smarter.

➢ **Managing change.** Lisa's mantra is: *"We are not involved in a technology project. This is a change management initiative."* Culturally and historically, the senior leaders of the organization were focused on the tech. They saw this as a website. Lisa made it very clear that this was about cultural change. If they wanted to build a culture of knowledge sharing, then this was not about the technology.

YMCA's 7-Step Change Model[1]. Fortunately, the YMCA does a lot of leadership development, so they already had a change model. It begins with identifying the issues, confirming the direction through data, defining a vision from that and mobilizing commitment from people, making a plan, activating the change and, finally, executing the plan.

In 2017, Lisa embarked on moving from their current platform to where they are today using this model. In the early stages of execution they used steps 1-3. They identified stakeholders and hypothesized about what was needed, they validated the hypothesis in person and through virtual focus groups. Lisa traveled from the east to west coast visiting all the YMCAs, talking to users from part time staff all the way up to CEOs about their needs and wish lists.

CASE STUDY - THE YMCA, CONT.

- They did a card sorting activity in these focus groups to help create their information architecture. They worked hard to get people involved and create buy-in through contests, such as a platform naming contest.
- They also hired a consultant. Lisa had to convince the executives that this would be beneficial, and it was very helpful. They did a 6-8 week engagement with 7Summit, who helped with internal and external research, insight collection, strategizing and the development of a roadmap. The roadmap was presented to the senior leadership team and assisted with additional buy in. It is content that is still used today.
- They had 4 internal working groups. In hindsight, Lisa would have added a few local YMCA groups (these were internal YMCA USA only groups for the most part). If they had more time and bandwidth, they would try to get more local users involved, but they did work well with their local Y USA staff.
  - The four groups were 1) a vendor evaluation group, 2) a group for change (called Change Agents), 3) a group for site design and information architecture and 4) a group for user-generated content.
  - The change agent group's purpose was to help them define the vision, the change tactics and the communication strategies.
  - The site design group created the design of the site.
  - The information architecture group looked at how to structure the site, the navigation and templates, the layouts and the design.
  - The user-generated content group's purpose was to move away from a push model. The success of the model would come from encouraging the YMCAs to share their own content with others. This group was dedicated to strategizing ways to not only motivate the sharing of that user-generated content, but also the governance of this content.
  - These 4 committees worked on various projects throughout this journey, including working with the consultant.
  - The work with the consultant started in February of 2019 and finished in April 2019.

➢ **Choosing a platform.** This process was new to Lisa. The Real Story Group is a vendor-agnostic organization that helps with vendor selection. This group offered a roadmap for companies in this space, i.e. web content management, online community management, etc.

CASE STUDY - THE YMCA, CONT.

- **Platform research.** Lisa used The Real Story Group's vendor mapping process. They crossed off the vendors that they knew were not on their radar. For example, they are a Microsoft organization and had no plans to switch to IBM, making it easy to cross off all the vendors that supported IBM. They researched the vendors that were left by calling them, conducting further web research, phone calls for testimonials, etc. This helped them to further whittle down the list.
- **RFI/RFP process.** They did an RFI process, followed by an RFP process to continue to shave down the list. Building these 2 steps consists of a lot of time and effort. This prompted Lisa to put together a document defining the real goals and objectives, as well as the biggest pain points, i.e. the things that must be solved. For example, they wanted to get out of the business of coding and building pages and HTML. That was a pain point. If it wasn't super user-friendly and if people couldn't basically publish the content themselves, they weren't interested in that platform.
  - o The Search engine was important. They wanted a better search engine than what was available in SharePoint in 2010.
  - o They knew what the most important requirements were and that helped to further narrow down the selection.
- **Virtual demos.** Lisa's team and the IT team conducted a number of virtual 1-2 hour demos with the vendors who were left. This allowed the IT team to ask technical questions to the vendors, which again further narrowed down the list.
- **In-person deep dives.** Once the vendors were narrowed down to 4, these vendors were subjected to in-person deep dives. The vendor came to the office and spent half a day with them. Lisa provided them with a comprehensive document outlining what should be covered in their meeting. Lisa also provided them with an outline of tips for good demos, i.e. don't talk about the awards won or clients served, just the pros and cons of the platform. Purposefully adding that structure to the meeting helped streamline it so that they could make sure that they were getting exactly what they needed from the vendor.
- **Vendor evaluation workgroup debrief.** The evaluation team had a scorecard for different rating categories. The workgroups had a strong range of tactical experience. This helped to offer a number of different perspectives around the evaluation.
- **Deep dive into cost.** This step is vitally important.
  - o After an evaluation of these 4 vendors, Lisa decided that she didn't like any of them. She wasn't willing to settle.

CASE STUDY - THE YMCA, CONT.

- o They went back to the drawing board and as luck would have it, a Google Alert came across that caught Lisa's eye. This led her to an article that highlighted MangoApps, which became their product of choice. MangoApps does a good job of meeting the social aspects of communities, as well as the knowledge repository aspect that they need with less lift from Lisa's team on the technical side.

- ➤ *Launch plan.* They did pilots in Q4 of 2018 and then staggered their migration in Waves, topical area by topical area. They developed criteria for which content would move and when. The goal was to launch by September of 2019. That didn't quite happen. They had an organizational shift in the middle of everything. In June of 2019, the CEO restructured the organization and it moved to a shift away from Y-USA as the center of expertise to leveraging expertise throughout the Y network. They would still provide some direct services to the Ys, but YMCA services and innovation would be more spread to the local Ys. This meant a dramatic shift for Lisa's team because they lost a number of SMEs. They lost approximately 30% of their workforce, which included a number of people that they were counting on in their model.
    - o The model evolved to include Y-USA staff, but also local Y staff and volunteers. In some cases, their topical areas only have local Y staff. They no longer had anyone at Y-USA.
    - o This meant that they had to re-think their model and how it would affect content migration and how they would moderate communities, training, etc.
    - o Right now, the model is about 1/3 Y-USA and 2/3 from local YMCAs.
    - o Parts of their services are delivered by staff from local Ys.
        - ▪ They are trying to move everything online to their platform, which is called "Link".
    - o The process includes change management, developing processes, training and governance. They had to do all of this work in a compressed time frame because they were given a new launch date. Instead of a staggered date where they would have launched Wave-by-Wave through September of 2019, the launch date was changed to February 1st 2020. This means that they now have to launch everything at once. However, they still did some pilots.
    - o They launched with 2 groups that had their own fall conferences (they wanted to be in front of people). These were the IT and Data Conference and the Global Camp Conference. They launched in person at those conferences.

CASE STUDY - THE YMCA, CONT.

- o They discussed doing away with pilots because of the pressure of the new deadline, but they decided against it because of the valuable information pilots provide. It was the right decision. Bottom line, do a pilot.

- ➢ **Tier process.** Emily discussed the tier process.
  - Due to the organizational shifts Lisa mentioned and the accelerated launch date, the process evolved to include mechanisms that would allow them to meet those dates, the biggest of these being the prioritization of content into tiers. This allowed everyone involved in the content migration work to focus on those items that were of most value to the Ys to ensure they were available at launch. In addition to the tiers, the team internally assigned the approximately 70 topic areas, which allowed them to focus on a manageable number of topic areas at a time.
    - o Tier 1 content was content that absolutely had to be available February 1ˢᵗ. Tier 2 and 3 content was content that could come online throughout 2019. They are still in the process of migrating those last pieces of content through to the end of 2019.
    - o Breaking up the content topics into chunks was incredibly helpful because they didn't feel overwhelmed by the process.
  - Staff training was paramount because they chose to use the new platform as their working space as they prepared content. So, they had a private space set aside where content experts could have access to all the tools that they needed and work on the content to prepare it for the new spaces.

- ➢ *4-step content migration process.* The prioritization work was the first task in the 4-step content process. The first step was called "Clean-Up." In addition to prioritization, in the Clean-Up step content experts prepared files for launch. In the second step, Prep for Platform, they shifted their focus to the creation of an environment that would help them to organize the files on "Link", the name of the new platform. Step 3 (migration) was the actual move of finalized content from their working space to the communities that would be available to the Ys at launch. The final step was the quality control phase.
  - Staff training ran through the entire process, which was needed because they used a private space on Link to do their behind-the-scenes content work. This meant that their Y-USA staff were trained in tandem on system functionality and growing their level of comfort with the platform.

LESSONS LEARNED

➢ It is very important to remember to celebrate. It was a very grueling time leading up to the launch date, especially with the new accelerated date. It was, therefore, so important to the team to take a minute, breathe, and celebrate their accomplishments.

➢ Communication is vital in any migration process. They worked closely with the marketing/communication team to develop a strategic communication plan. They continue to work with them to ensure that they have a coherent strategy for communication with users. Part of that is having some language about how they communicate what their platform is and the benefits they expect it to bring to the users. This language is used in all orientations, training, etc.

➢ It's important to have a platform that is aligned with your culture, as well as training that is aligned with your culture.

➢ Building relationships is a priority for Lisa and is advice that she still gives today. That is the best way to affect change and learn from others.

➢ Admittedly, Lisa is probably a little more technical than most in her field. She did a computer science minor. She has worked for tech companies and a technical support department. This has helped her to know how to ask the right questions and put the pieces together and to be respected in the conversations with IT and the business side. It's not essential to be this tech savvy, but it has certainly been helpful.

➢ Kelly asked Lisa and Emily for the advice they would give to somebody planning a migration.
  • Emily said that she learned that it was vital to work closely with the content experts, especially because of their accelerated timeline. Remember to leverage those people who have the knowledge to share to make sure that the platform delivers on what they need.
  • Lisa said that they did a "Lessons Learned" session with their IT team after the migration. The positives were that they outlined a very clear vision. Even when their organization was in chaos, they had a North Star to help guide them.
    ▪ Communication is vital.
    ▪ Acknowledge that people will have breakdowns during this process and that's ok.
    ▪ Lean on your super users to help migrate the content.
    ▪ When something isn't working, be open to changing your path.