THECR
NETWORK

Diary of Launching a Community Platform: The Call

SNAPSHOT

SPEAKERS
Kelly Schott (TheCR)

COMPETENCIES
Strategy, Tools

MATURITY PHASES
CMM1, CMM2, CMM3, CMM4

HIGHLIGHTS

1. **Want to benchmark your community launch against others in TheCR Network?** Three participants shared the journey of their launches from the beginning of 2019 to year end.
2. **Interested in learning the surprise challenges of various community launches?** Four revelations were exposed.
3. **Feel that you could benefit from community launch take aways?** Six big take aways were shared.

OVERVIEW

➢ **Background.** Kelly asked participants to share the journey of their launches in terms of how they started 2019 and how the year will finish:

- One participant explained that they started on the Socialcast platform. They had about 40,000 people on the platform, which was 90+% of their associates, plus a few thousand contractors. They didn't yet have access to their Yammer test environment, no documentation training created or people identified internally who would need to be involved with the process. Their deadline was the expiration of the Socialcast platform itself. They beat it by 4 days. At the end of the year, they now have 71,000 people on the Yammer platform, which launched July 15 because they added another 20,000 contractors to it that didn't have access to it before. The remainder of their associates have shown lots of activity in the last couple of months. They have actually been ahead in terms of volume of activity year-over-year, which was an improvement from after the migration due to the pain of change. Now they have partnered with a metrics firm with some valuable outcomes. They are in a good place and using it as a model for the other Office 365 rollouts.

OVERVIEW, CONT.

- o The migration went well because they had involvement from many people throughout the company at any point of need. After the migration, they rounded up a list of everyone who had touched the migration process in any way, which was 90 in total. They had some fantastic project managers on the IT side, as well as others who involved each other in positive ways. They had good leadership support, which made a huge difference.
  - o The biggest challenge was finding someone who could actually migrate data from the old platform to the new one because neither Microsoft nor the previous vendor knew of anyone who had migrated from Socialcast to Microsoft. Ultimately, Microsoft stepped up and did a phenomenal job as part of their enterprise contract.
  - o They had a great training partner with IT learning services to develop resources and live events. It involves ongoing education, but getting all the right people at the table and agreeing to a hard deadline was critical to getting it all done.
- Another participant explained that half the year has been with one company and the other half with another company. In this person's experience, in her last company there was a huge emphasis on the technology piece of building, which is important, but it's not the whole story. IT's not the most important part of the story when building a brand new community. Therefore, with her new company she has been focusing more on building the community offline and then bringing that dynamic to a digital experience. There are things that they've done with their customer advisory board and events team, etc. to start fueling the fire to get a group of advocates together before inviting them to the digital platform. People understand it and it's easier to talk about community from offline to online and building the relationship and the human experience. Then it's much easier to gradually introduce the platform and some use cases.
  - o This is all very new to this organization. There are people who came from other companies with thriving customer communities, which offered valuable insights and support. All in all, getting people together and starting the conversations is the first step. When the timing is right, then they can be invited into the community beta testing processing.
  - o Customers have been very receptive to the idea of community, as well. Being able to talk to them directly for feedback has been helpful in the development of use cases.

OVERVIEW, CONT.

- For another participant, she explained that in the beginning, the department was called "Knowledge Management" and was run by 2 librarians who were focused on information services. This year has been about awareness in a broader scope in terms of what knowledge management really is, as well as the fact that a field called "community management" even exists. At the beginning of the year, most people didn't know what an online community was and didn't know that community management was even a profession.
    - They had Microsoft Office 365, but no one had even clicked on MS Teams. There was very little social collaboration within the company, only isolated pockets. This year has involved leading the company through an awareness campaign. It's been a huge gift because people have been listening. This participant has been able to explain that she wants to build a Center of Competency and what that means for the organization. They wanted to bring in the people – i.e. the community managers – before the technology and that did happen. It's been a year of building the people before choosing any technology. This has involved a needs analysis exercise on many different projects. There are 4-6 online communities that they are in the process of launching. Since they are a small organization, they've been able to fairly quickly reach a tipping point with MS Teams as a result.
    - Another factor that has helped with the receptiveness within the company is that many of the staff are learning professionals. They may not understand the technology, but they understand the importance of knowledge sharing.

LESSONS LEARNED

➢ **Kelly asked participants to share the surprise challenges that they encountered along the way:**

- One participant shared that her biggest struggle was the addition of GDPR – General Data Privacy Regulations. They thought they had a good grip on how they were going to handle requests and manage notifications, but they didn't realize how big of an impact it would have on their internal employees. They had to disable email notifications and in Jive, those were automatically enabled and then turned off. Having it in the opposite setting, they had to then encourage and train their employees – especially new employees – to enable their notifications and set where to receive notifications. That was a big hurdle to overcome.

- Another participant shared that they kept finding out new connections and integrations that they weren't necessarily thinking of at first. Their platform was always standalone. It didn't impact other systems. Now with Office 365, it uses SharePoint behind the scenes with links to their SharePoint site. That was a problem if people tried to get to it, but it wasn't yet enabled by the enterprise. Furthermore, when groups are created, it impacts other groups. Groups did not show up in the address book for Outlook because it's a group and that's what happens with groups in Office 365. Sometimes these discoveries would initiate a red flag and force a decision and action in another product sooner than anticipated. So, finding out all those connections was a challenge that needed to be quickly addressed.

- As explained by another member, she finds this to be an interesting reflection for the industry. In the past, she has either been a lone wolf or a team of 2 that was not embedded in IT. Personally, one of her learnings has been that it is clearly an IT VP. In the past, she has run and launched these community platforms and been the community manager. It's been interesting to figure out how to work with a larger group of people with actual described job descriptions. It has been a difficult transition. There are pros and cons to being a lone wolf. So, as the profession matures and IT becomes more involved, you have to let some things go. This participant admitted that she has had to get better at project management, even though it's not in her nature. She's just a doer and when you have to work with others, it's a different mindset.

- Another member agreed. She has finally been able to hire a community associate. She spent 6 months training this person, which took away from her own day-to-day job. This person moved to a different department after a short time. So, not only did she invest all this time only have this person move, it cast a light on the department in terms of why the person left so quickly. She had to answer so many questions about her goals and the roadmap. There are pros and cons to being a lone wolf vs. having the help.

LESSONS LEARNED, CONT.

➢ **Skill sets that became evident in these processes were:**
- **Somebody needs to be a calming and assuring voice throughout the process. A recognizable face with a guiding hand.**
- **One participant has realized that most community managers do product management work, but they don't realize that developing use cases and interviewing members, etc., is very much aligned with product management. This participant has product management experience now and knows the lingo a little bit better.**
- **Skills are needed for vendor selection/tool selection because, according to this participant, it's going to be a constant churn of new tools. From a community manager standpoint point, it's necessary to be able to understand what the tools do at an abstract level. There is a difference between education and training. You are trained on a tool and educated on what these platforms do. This way, when the next platform comes along, the transition and decision-making will be easier.**

➢ **Participants were asked for their one big take away:**
- **Instrumentation is reporting. Make all the right investments from day one to surface the key metrics that you need to measure the health of your community. Work hard with your operations teams and platform vendor to ensure that on the day you launch, you can measure what matters. For example, this participant had to pull data from Salesforce, Google, Adobe and ADEO, which was time consuming and error prone. Building the reporting chain upfront was key.**
- **Understand the pain points of the people you are trying to serve so that when you do launch, you address those pain points upfront in order to increase adoption.**
- **Don't be tied to a tool or a mental model around how a tool works and, therefore, that's how to run a community. This participant has launched 3 Jive communities. It has been an interesting process to move away from being a Jive customer. They are going to have 5 different platforms running at the same time, so it's important to view online communities as one tool of knowledge sharing. It's not the tool that's important. Most people know that intellectually, but it's hard to let go of how to run a community based on the platform. It's liberating now for this participant – and it's good for community management careers – to be able to go into an organization and try to be agnostic and match the use case to what the organization needs.**

LESSONS LEARNED, CONT.

- We still have a long way to go to measure the business value of communities. That has been the most challenging part of the evaluation process for this participant and digging into reporting and analytics with the tools. The vendors don't get it. This participant has her list of metrics that matter and what she is going after. In theory she knows how to get those, but she has yet to see the end-to-end illustration of business value that she's going after, as well as relaying that to the vendors who build these platforms.
- Embrace the opportunity to involve others in the project. This was something new for this participant, since he often acted as a lone ranger for so long. When an IT program manager for Office 365 assigned someone to be the Yammer migration project manager, it took this participant aback. It's wonderful, but he was used to doing it all. The upside was that these new people assigned to the project often had budget dollars that came with them. Learn to relinquish control and understand that that will be difficult. In the end a better product will result.
- The migration can be a great way to market the community beyond just the support teams. This participant has been able to hone her marketing skills through this migration. Since she had to do so much evaluation with community, she was able to leverage that experience to put together use cases for other people and go to them to showcase new products. So, look at the migration as an opportunity to position your community to others in the organization.

➢ Participants offered their helpful resources through their migration process:
- A sandbox environment is invaluable when evaluating vendors. This participant had 3 sandbox environments and compared the vendor platforms side-by-side to work through community scenarios when making a decision on the tool itself.
- Other community managers and TheCR Network are great resources.

➢ Early adopters are an asset for jumpstarting engagement and adoption. Identify people in the beginning, address their concerns, and show them how the community will solve their problem. Invite them into the community early – perhaps with a soft launch prior to the hard launch – and then get some of their feedback. Implement some of those changes before going live. That group of early adopters using the tool successfully will become walking advertisements for you.
- Another participant agreed wholeheartedly with this statement. Allow anyone who wants to be in the pilot to participate. The more people who can be positive advocates, the better.
- Customer advisory boards are great, but they won't necessarily be your power users.

ADDITIONAL INSIGHTS

- ➢ **Kelly asked people to describe their community launch process:**
  - • **Process for migrating has been "lift and shift" for this participant. This year the focus is mobile app and personalization.**
  - • **Another participant has focused on platform migration. They migrated to Yammer as part of a larger adoption for Office 365.**
  - • **This participant was hired to build a brand new customer community. She is in an evaluation process, demos and playing in the sandbox with a couple of different vendors.**
  - • **Yet another participant is working on an external site. This participant has evaluated Telligent and MangoApps.**
  - • **Lastly, one participant's process required a lot of internal user training to help them understand how to use the features. Everybody is fully on board. New reporting was rolled out in the spring, which really helped the forum managers. As for the process, they made sure that plenty of training was offered in the form of discussions, videos, etc. When the rubber hit the road, it became about hosting employee webinars. Acquisition is ongoing, so onboarding is a constant.**