ROUNDTABLE REPORT

# Digging Deep Into Data

## HIGHLIGHTS

- **Interested in being able to tell a story with your data?** This was a goal cited by many on the call. It was also identified as an issue in Rachel's recent metrics' poll. Rachel offered 3 steps to help participants tell a story with their data.
- **Wondering which burning question must be answered before you can slice and dice data?** Ensure that the answer to this one question is crystal clear before trying to interpret data. The answer will help you maintain focus by discounting 95% or more of the data.
- **Looking for a way to cut down on trivial data requests?** This one step will not only help you to prioritize data requests, it will help you to cut down on frivolous requests.

### SPEAKERS

Rachel Happe and Kelly Schott (TheCR)

### COMPETENCIES

Metrics & Measurement, Strategy

### MATURITY PHASES

CMM1, CMM2

# OVERVIEW

- **Biggest metric issues.** Rachel conducted a metrics' poll on Twitter and Facebook. The biggest metric issues from this poll were a) identifying key metrics, b) getting access to the right data and c) telling a story. The participants on this call expressed similar issues with a slant towards learning how to tell a story with metrics.
    - There is so much data available. The temptation for community managers is to dive into the numbers head first. However, that's a mistake because the volume of data prevents them from being able to figure anything out. Every type of data can be captured online. The issue is being able to figure out what matters. The data isn't going to magically pop off the screen.
    - The other challenge Rachel sees is that people become confused and frustrated by the fact that research is a continuous loop. Rachel publishes the huge State of Community Management Report (SOCM) each year and the feedback she gets is how to slice and dice the findings even further. She has to be able to cut it off somewhere or it would never be finished. Even with all of Rachel's experience conducting research, finalizing the Report is still her least favorite task. There is always more data that she could reveal.
        - If community managers don't realize that they're in that continuous loop, that kind of feedback creates anxiety. Understand that additional data is part of the process; you can't do it all. There is an ROI to the ROI.
        - Therefore, it's important to start out knowing your priorities. This way if someone asks you for additional data, you can say: "We didn't look at that because the questions we tried to answer were A, B and C." Then you can say that if it is a priority, you can incorporate it into the next iteration and/or you can request additional funding if it is a burning question that needs to be answered.

# BEST PRACTICES

- **Be open to feedback on your research.** As explained above, research is a loop. Be open to the feedback knowing that it's going to come regardless of the high quality of your research.

- **Understand flow control state.** For people who aren't data analyst experts, this volume of data can create high levels of anxiety. Once they begin to understand the research process and what can or can't be done, the data they have or don't have, and/or the investment required to do the work, the faster they can move towards the flow control state. By control, Rachel means that the data itself can't be controlled as data collection is never complete. However, as a community manager you are in control of the *process* of collecting and reporting the data. Rachel's goal is to help participants understand how to frame the process, which is the most important aspect of the research, especially for storytelling. Without the framework, it's very difficult to have control over the metrics reporting.

# BEST PRACTICES

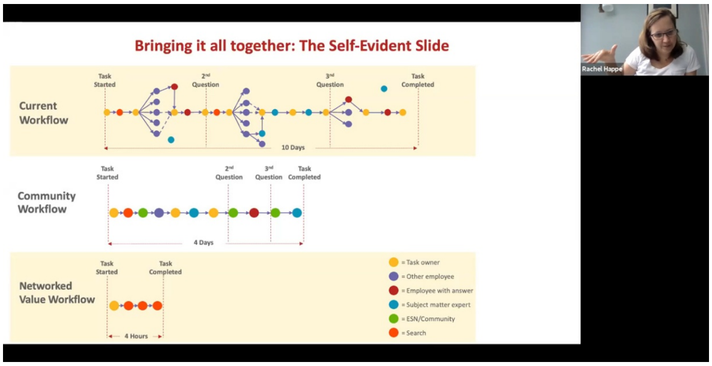
- **Understand the level of data needed.** This is critical because it will determine the level of extraction that is produced. The only people who need tactical data are community managers. It will tell them if a program worked or if welcome emails are working, etc. It tells them if something they have done had an impact. Never give tactical data to a program manager or executive. It will cause more questions that could create havoc. They will think they understand something that they truly don't understand. For example, questioning log-ins week-over-week or month-over month.
    - If a business unit wants to understand the value of a metric for a specific business process, you need to understand the whole workflow and where the community sits and is used within that workflow. Put the data aside and interview the people involved to understand how they use the system, the workflow, etc. However, at a strategic level it will still be very abstract. Find a pattern that you can extract all the way up to the ROI or its impact on strategic goals. Often, certain data requests at the operational level require an integration of systems. For example, if the CRM and community data are not integrated, you won't be able to calculate the lifetime value of a customer. It will definitely require help at the strategic level. It means working with other people. You won't always be able to provide the data on your own.

# BEST PRACTICES

- **Look for the data combinations that tell a story.** Rachel very quickly went through the process she uses with the SOCM. When Rachel looks through the SOCM, she looks for averages compared to other segments. She always looks for the biggest differentials. She literally takes a notebook and jots down all the metrics where the data is off. She examines the words of the metrics, not even the data at that point. She asks herself: “What do all of these things have to do with each other?” and “If half of them are up and half of them are down, does it make sense?” and “In what way would that make sense?” and “What is going on to make this happen?” This helps her to pick out contextually and/or logically what she knows intuitively and from experience that fits or could fit the pattern. This helps her to compose a hypothesis. She can now take that and go back to the data. If this is going on, what would that look like? It creates a cycle of what goes together or looks like it goes together or is correlating together. The bigger the correlation, the more likely there is a causation or connection.
    - Rachel warned that correlation is not causation, so don’t confuse the two. However, if there is a big correlation – particularly between 3-5 metrics – you can fairly accurately say that something is driving that correlation.
    - Rachel gave an example to put this in context. In the SOCM, they reported on “average” vs. “advanced” community segments as it relates to having a measurable strategy. The advanced segment correlated with 10-20 different metrics that were better than the average segment. This meant that having a measurable strategy correlates with better performance. It doesn’t say that it correlates exactly with ROI, but there is a correlation.

# BEST PRACTICES

- **Examine the "self-evident" slide below.** Rachel stated that if community managers can diagram how a workflow takes place for a business unit, they can try and answer certain questions. For instance, if a business manager wants to decrease the amount of time it takes to respond to an RFP, ask what that process looks like today. You will never get an exact diagram, but try for generalities that people will agree are believable processes.
  - What would this process look like with a functional community as part of the workflow? Usually there is marginal value, meaning that there is some value to doing it. For instance, you could get the answer you need with an email. The huge value of a community comes from capturing this so that the third person or more who comes in with the same question can get the answer without ever needing to ask the question. That value increases exponentially by the number of people who find their answer without needing to ask the question.
  - Your goal is to take the process and shrink it. Ask if it has value. Then, if it can be shrunk even more and have value, that's when you start discussing the community management costs. You are changing a behavior to get people to do things differently than they're doing it today. That costs money and community management time. Show the value of using community as part of the process. Most executives will see the light. Now if there are sharing of questions and answers in this workflow, you will know what to measure in the system, i.e. questions, answers, views, etc.




This slide was used in Rachel Happe's presentation to TheCR on June 24, 2020 entitled *"Digging Deep into Data."*

# BEST PRACTICES

- **Learn how to tell a story with data.** Many people use raw data or counts over measures of time. That won't help. You need to normalize and compare the data. That means month-over-month in order to see a trend that tells a natural story. You need percentages that help to normalize the data. Always divide the number of a certain behavior by the total number of members in the community because the membership in the community fluctuates. If you just show the actual count, that is not meaningful if the number on the bottom shifts.
    - Comparison by segment. If you can compare an activity by 2 different business units, you will see which community is performing better. Ask the segment that is doing better for their best practices. Compare that to the segment that is not doing as well to help that segment improve. It's actionable data. Understand that if you are producing data that doesn't give an obvious decision, it's just noise.
    - Community managers are the experts in community. Don't give people data without an interpretation of it. Preface it with: "This is what I think is going on and this is what I recommend we do as a result." If you don't include that, you are leaving yourself exposed to someone not understanding and coming up with his/her own erroneous interpretation and what should be done.

- **Always err on the side of simplification.** Don't overcomplicate your data. It takes up a lot of your time and no one will look at it.

# LESSONS LEARNED

- There are many ways to slice and dice the data. What needs to be crystal clear is: "What am I trying to do?" Rachel would urge participants, whether they are thinking strategically or tactically, to step back and ask themselves this question. Get that straight before even looking at the data. Then you can understand whether the data fits or not because 95% or more of the data will not fit. This way you remain focused. You know what you're looking for and its influencers. That's the beginning of your story. The story is the hypothesis or question.
  - For example, if your business line executive asks you: "How many people are logging on?" ask why he/she wants to know that answer. If they answer that they want to know how many people are using the system, that isn't the right question and it won't give them the right answer. It just gives the answer how many people have logged on once. That's it. Be inquisitive when you respond. Research what it is that they are trying to know. It will also help you understand the story and the strategic plan. Sometimes the metric has been translated without giving the data for which the executive is trying to know. Ask back: "Why are you asking that?" or "Help me to understand how you're going to use the data." This will also tell you how much time to invest in gathering that data. If it's for something specific or for benchmarking, great. If it's something that needs to be reported month-over-month, you can put the processes in place upfront. If they are just curious, don't waste too much time on it.

# LESSONS LEARNED

- The other issue that's important is who is asking for the data. Is it your direct supervisor? Executive? A community member? What's their priority in the organization? Understand what they are doing, what they are planning to use the data for, why are they asking, etc. All of those questions will help you figure out how to respond. An added benefit is that this will make you look more competent.
- You will always be asked for data errands. Rachel coached that it's important to think about how to prioritize those data requests. Recognize that there will be times you have to say no. Create a policy for requests, i.e. a policy for what you need as part of that request in order to prioritize and satisfy. If you have not defined a policy for fulfilling these requests (just bullet points), you won't know when or how it's appropriate to push back. There needs to be some pre-determined language to take it out of their individual agency so that you have what you need before you process the requests.
    - This will slow down the process. If it's just a casual request, people will likely drop it if they have to do some upfront work. That will tell you how serious they about the data request.

# LESSONS LEARNED

- If you don't have the data you want, the hypothesis becomes how to get the data or a reasonable assumption about the answer you care about. It could be a survey, interviews, etc. Investigate other techniques to better understand the question and its answer.
    - Community platforms today don't lack data. They lack logic. They don't help community managers to understand why it matters, why they should be looking at it, how it fits with anything else, how it correlates to anything else, etc. It's just an abundance of data without meaning.
    - Rachel has been beating this drum with the vendors for more than a decade. The vendors are experts in the technology, not experts in business processes. However, that is the crux of the issue. They understand databases and how to generate the data points, but they don't understand what matters from a business perspective.

- Rachel said that, oftentimes, data is used as a weapon. However, data should be used as a learning tool. Try to orient the conversation around what was learned vs. why the data is good or bad as a way to gain buy-in. Metrics and data have been used as weapons for so long that many people will automatically get defensive. Their first thought will be concern for how the data will be used against them. Shift the conversation to a learning mode.

# RESOURCES

- Kelly asked participants to share an overview of where they are in their metrics journey:
  - One participant would like to learn how to weave storytelling into the metrics and to find meaningful metrics.
  - Another participant shared that they have a lot of data, but they don't know if it's the right data. Furthermore, just because they have it, they don't necessarily know what it's measuring.
  - For another member who is in the middle of a migration and the addition of resources due to a new president who understands community, they are looking to better align the community with the company's business goals. In order to do that, they need to be able to measure what they are doing. Right now, they don't have meaningful metrics. So, this member would like to look at the data in relation to strategy so they ensure it aligns with corporate goals.
    - This member's colleague is known as the metrics guru. However, she has struggled with tying metrics back to the business goals. She would also like to learn more about how to tell a story with the data that will resonate with executives.
  - Lastly, one member wants to be able to pull out the meaning of the data in terms of the questions that the data can answer and tie it to the corporate strategy.

# RESOURCES

- Rachel's slide deck can be accessed at: https://www.dropbox.com/sh/03lue6yxowqf68s/AABj-yUCF7Wn70af9J7a5GyOa?dl=0&preview=GMT20200624-170728_-Roundtabl_gallery_1760x900.mp4
- Metrics & Measurement Resource Bundle - https://network.communityroundtable.com/browse/resource-bundles/metrics
- Proving Community Value Resource Bundle - https://network.communityroundtable.com/browse/resource-bundles/value
- State of Community Management 2020 Report - https://network.communityroundtable.com/viewdocument/the-state-of-community-management-2-2?CommunityKey=7340d4a5-8d4c-4a6e-b1dd-3bfb07f292c3