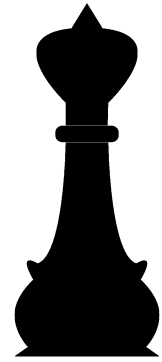


# Getting To Know ALL Of Your Members



## SPEAKERS

Allison Brotman (Ultimate Software) and Kelly Schott (TheCR)

## COMPETENCIES

Strategy, Culture

## MATURITY PHASES

CMM1, CMM2, CMM3, CMM4

## HIGHLIGHTS

- **Want a plan to get to know your members better?** Allison outlined a 6-step Community Transformation Project that yielded incredible insights from getting to know all members in her community.
- **Interested in some key lessons learned from Allison's Community Transformation Project?** Allison shared 4 key lessons learned, as well as the overall key takeaway that she felt was the most important of the 4 lessons learned.
- **Curious about which metrics can be used to define the success of such a transformation project?** Four key success metrics were shared by Allison and her team. The last metric was an add-on gained from listening to their stakeholders.



# OVERVIEW

- **Background Allison Brotman.** Allison has varied work experience ranging from non-profit associations to large global organizations and then to a start-up technology company and now Ultimate Software.
  - Allison was a member of the 2018 Data Community Management Working Group. She has won Best Community Dashboard for visually representing data as a way to tell their community story. She is also the TSIA 2018 Star Award winner for innovation and knowledge management.
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- **Background Ultimate Software.** Ultimate Software provides human capital management solutions to improve the employee experience by putting people first. The organization is always winning awards and being recognized. Excellence is clear throughout the organization, which is one of the reasons Allison chose to become a part of the organization. Ultimate wanted a Best in Class community program and set the bar high.



# OVERVIEW

- **Community Transformation Project.** Allison explained how they evaluated their audiences and got to know their members as part of the Community Transformation Project.
  - Allison joined the company at the end of November 2018. She hit the ground running with “The Listening Tour.” This included internal and external stakeholders.
  - Allison was impressed by the number and types of people who wanted to talk about community and what they had to say about the current community program. She spoke to C-Suite, frontline and customer-facing staff and all those in-between. Her team gathered feedback on the current state and analyzed the data. The bottom line from all the activities was that there was a lot going well. That didn’t mean that they couldn’t further improve and build upon these successes to become Best in Class.

# BEST PRACTICES

- **Consider these steps to get to know ALL your community members.** Allison shared the steps taken to develop their Community Transformation Project:
  - ***Define (Feb-Mar. 2019).*** They needed to define what it was that they wanted to do. As a first step, they benchmarked their current program against best practices from others in the industry. They obtained much of that information through TheCR and its State of Community Management Report or through peer relationships.
    - They used this as an opportunity to educate stakeholders and redefine what community could look like.
    - They mapped out what they wanted using a design-thinking approach called “LightStarters.” This helped them to collaboratively define the “what if” or “what could be” in the design process from a strategy and experience perspective.
    - In the end they were able to use those insights to create a prototype. This was very helpful in the strategizing process. The prototype helped all internal and external stakeholders visualize what the new community program and experience would look like. It was helpful to get the feedback as some of it was very constructive. They incorporated the feedback where possible.

# BEST PRACTICES

- ***Design (April – May 2019).*** Next they moved to the design stage. This is where they translated the strategy and experience to requirements. They leveraged the stakeholder requirements to prioritize the development work.
  - At Ultimate Software, they don't have the ability to physically update their platform. They rely on a technology partner to do that work for them. They needed to prioritize that work in their backlog. As soon as they started working with them with a minimally viable product from a development perspective, they conducted usability testing with a small sample of customers to refine the design.
- ***Develop (June-July 2019).*** At this point, the work shifted. They were no longer leading, but instead co-leading with their technical partners who started the development process. While the development team was consumed with the details of developing, it gave Allison and her team the opportunity to reflect.
  - They had been so focused on building relationships and the execution of the plan that they zoomed out for a different perspective. It's also an apt metaphor for strategic thinking. Some people are naturally inclined to see things up close and others have a viewpoint from afar. Both perspectives have value. To get a complete picture, both perspectives are needed.



# BEST PRACTICES

- Everything was going along well and on track, but Allison began to feel like she wasn't asking the right questions. She wondered if all the right people were participating in the community. She began analyzing the current membership data. The current users with access were, in large part, those customer contacts who submit cases and who are the primary contacts for contractual responsibility.
- What they learned was that there were 51 million people records in their Cloud from customer organizations both past and present. What was most important to these people was data and privacy security. There was very little value in bringing these people into the community, nor did they have much to offer the community.
- They had 9 million end users who were employees at their customer organizations. What was important to these individuals was their personal tax filing forms and making sure that they got them on time, that they were accurate, etc. Access and password assistance to Ultimate's UltiPro program was important to them. Allison learned that it wasn't standard and it varied by customer. Their customer's HR and Payroll departments would define this and provide assistance if any of the users had questions or feedback. So, again, there was no value to join Ultimate's community.
- Allison analyzed the data further and learned that they had 140,000 users who could administer or control certain modules, feature areas and processes within Ultimate's product for their customer organization. On average, there were 22 of these roles configured per customer organization. That was much different than the 4 who had access to Ultimate's community.

## BEST PRACTICES

- It made sense that they would value the community if they could have access to learning, to best practices, to product documentation, to release information and if they could connect with peers. They would bring value to the community via their product expertise and their industry expertise.
- They went to their stakeholders and showed them how the customers were using the product, as well as the gaps seen by Allison and her team. They also shared facts about who participated in other product and technology communities. They listened to their feedback and concerns, tracked the answers to their questions and then talked to customers who regularly participate in the community, as well as those who fell in the gap.



Functional roles that customers configure in UltiPro, log in daily, weekly, and do not have access to Community illustrates a 120k gap

Power / Admin Users	Sum of Unique Users
BI / Reporting	51,240
Onboarding	21,406
Talent	20,352
Payroll	8,110
Time and Labor	6,525
System Admin	5,712
Benefits	4,146
HR	1,869

Note: Based on usage data provided by Product on 6/6/19 and access data in Salesforce on 6/12/19.

### USAGE DATA + CUSTOMER INSIGHT ON ACCESS

Other functional roles that existing members feel would benefit from the value of Community primarily revolve around Payroll/HR alongside Reporting & System Management

	All
Payroll	<b>76%</b>
Reporting	<b>73%</b>
Human Resources	<b>70%</b>
System Management	<b>61%</b>
Time and Labor	<b>52%</b>
Benefits	<b>49%</b>
Talent	<b>49%</b>
Tax	<b>36%</b>
Other	<b>9%</b>

Note: Percentages in bold means there is a significant difference between the two groups  
 Base: 33 community participants (16 Old Community, 17 New Community; 21 Current Customers, 12 New Customers)  
 Source: 2019 Community Pilot Study



Figure 1 – Usage Data and Customer Insight Data – Slide 9

# BEST PRACTICES

- The left hand side shows the usage data and the sum of unique users. When they asked their customers who they thought would benefit from access to the community, it lined up to the same functional groups.
- As a result of this data, they got to know some of the customers who fell in the gap. They were able to truly understand who they were and what was important to them. They used that insight to create a campaign to build-out how they would expand access for this group and why it was important.
- Looking at this from an individual standpoint, they recognized that they really weren't setting these people up for success. They didn't have access to learning, to the community of peers, the knowledge base of articles or a peer exchange of report templates. It was a simple fix to be able to provide these people with access to these self-service resources.
- They were careful to carve out the assisted support channels, such as the 1-800 number, the chat and the case management areas because they knew from listening to their stakeholders that they did not want to see an increase in the support case load. That was a huge concern for them.





# BEST PRACTICES

- **Deploy pilot (Aug. – Sept. 2019).** With the success of this campaign and the buy-in, they added the expanding access component to their timeline. This involved a gap analysis, senior leadership approval and the beginning of socialization.
- **Deploy all (Oct. - Dec. 2019).** While they were discovering the identity of these users in Q4, they went live with their remaining customers. In the background, they were doing the right things to update their Salesforce contract during the renewal cycle to provide licenses for all these users. They also got to know all the gap users and listened to their feedback.
  - The community transformation rolled out to all customers, but Allison and her team still felt that their work was incomplete. They still have users who find value in community and who can bring value to community. They wanted to expand access to these users. They have a timeline in place for this and it is a work in progress.
- **Next stage – early access (2020).** After they did the discovery and defining during the design phase, the team created a cross-functional working group. Even through COVID, this group felt that their work was important – even more important than ever – and agreed to take on some of the extra work. This was an unexpected benefit that wouldn't have happened otherwise due to a lack of resources brought on by the onset of COVID.
  - They are in the middle now of early access. This group with early access is giving them plenty of feedback from an on-boarding experience perspective, as well as what they value about the community program. Prior to this, they were mostly invisible to the organization. The marketing team didn't know who they were and never had any interactions with them. Now they are part of their world, which has been a tremendously beneficial experience.



# LESSONS LEARNED

- Allison offered her lessons learned:
  - Ensure that you take the time to zoom in and out to get different perspectives of the process.
  - Be data-driven. There are emotions tied to doing things the way they have always been done. Even at the customer organization, there were strong feelings for control of information and who should have access. Keep the data in the forefront in these situations. This will help to guide you when things are uncertain.
  - Do more listening. Community experts often know the right approach or how others have tackled the same challenges, but what is very powerful is to ask good questions and let other team members across different business departments tell you what community can do for them. Listen for their pain points. Incorporate them into the plan that you're building. It will help them feel like it is their program and their community if it's built with their ideas and input.
  - Get comfortable with not having all the answers. Build it together.



# LESSONS LEARNED

- Kelly asked Allison to sum up how she would describe working cross-functionally and the importance of the relationships.
  - Make sure that you leave time for it. The way work gets done is through relationships and through trust, especially when it's new. Take the time to have one-on-ones with people that you don't know at all levels. It would not be as successful if this was a top-down or bottom-up approach. Success meant building this across all levels.
    - The middle level was resistant because it meant a lot of change. Allison and her team needed to understand where they were coming from in order to get their buy-in. It was the only way to move forward.
    - In this phase of gaining buy-in – especially from resistant groups – be comfortable losing a little bit of control. Let ideas be shaped by others. This can be challenging, especially if it is your idea or you are the one being held accountable for it. Look for ways to give a little in order to gain a lot. Change can't happen without cross-functional buy-in.
- There are a couple of ways to listen. First, Allison and her team used a Customer Advisory Board. They worked closely with Monica to build the program and they had some great ideas about things that they would like to see evolve.
  - They are lucky to be a part of a broader team. At Ultimate, the community team reports up through the learning organization and they have a learning user researcher. She recommended a couple of different things, like surveys to gather data in aggregate to understand themes and sentiment. She would organize usability testing or focus groups if they wanted to target the feedback.
  - When they were getting to know the gap members, they did one-on-one interviews with the same set of questions in order to have a level playing field when comparing notes. It was the best way to understand that population.

# LESSONS LEARNED

- The services organization of Ultimate had service-focused roles already defined. This was someone who could open and manage a case, somebody who could be a training-only user, etc. They had a handful of these defined “personas” and Allison and her team went with the flow of it. It wasn’t until they looked at the data that they started to ask for new personas.
- The success of this campaign has been measured by a few different metrics:
  - A certain percentage of their overall top community contributors would come from this population. They are not case-creators or power users or other admins.
  - They also want to see them move up in the engagement framework. So, they must log-in within a certain period of time to move from listening and lurking to collaborating and creating and sharing. That is measured.
  - On the account level or the organization level, they will look to see how it impacts the overall customer satisfaction and likelihood to renew.
    - Monica added that after interviews and listening to stakeholders, they had concerns about increasing the volume of support cases. Therefore, Allison and her team needed to add a measurement for what they call “unintended consequences.”



# LESSONS LEARNED

- Allison and her team worked closely with their customer success team. They kept them involved by feeding them regular updates and made sure that they knew what they were doing, where they were going as changes occurred, why and how they were changing. They let their researcher do the research because it yielded objective data. There wasn't any community bias. It was prudent to have that objective voice.
- Kelly asked the group: "What percentage of your members do you think you serve?"
  - One member felt that it was less than 5% of their total user base. This member is figuring out which questions to ask in order to put a plan in place to increase that number. She is working on building out a Product Advisory Group. She'll be asking for up to 10 volunteers from their community users.
  - Based on metrics, another participant has 86% of their employee population who use the site. But serve means something different. Certainly, a percentage of that population is not necessarily happy using it. They use it because there is nothing else to use. This requires user interviews to get at a more accurate answer. This participant also stated that the interviews would need to be objective. Kelly agreed.

# LESSONS LEARNED

- For Kelly, she went through an interesting thought process with this question. She thought about who is in her community and who might not be reached. It's a completely different way of looking at it.
- If Allison could narrow it down to one key takeaway, she would say that it is important to focus on the data. Look at it from a couple of different angles. Talk to people. Don't do an analysis in a silo. Share what you are seeing and ask for iterative feedback from those who you have built candid relationships with. It helps you to stay open to new interpretations so that by the time you share it with a broader group, it will bring you closer to your end goal.



# RESOURCES

- Allison's slide deck can be accessed at:  
[https://www.dropbox.com/sh/4fy57lw0xtyp5sb/AAAmx6SO5xhC3gdtbv5-tu5za/June2020\\_Roundtable\\_Members.pptx?dl=0](https://www.dropbox.com/sh/4fy57lw0xtyp5sb/AAAmx6SO5xhC3gdtbv5-tu5za/June2020_Roundtable_Members.pptx?dl=0)
- TheCR's Community Fundamentals Training -  
<https://thecracademy.talentlms.com/catalog/index>
- TheCR's Engagement Framework -  
<https://network.communityroundtable.com/viewdocument/the CRS-working-out-loud-framework?CommunityKey=ab3f7721-86f5-47fe-9391-12f4bff74d35&tab=librarydocuments>

