Get Inside Your Boss' Mind With Metrics

HIGHLIGHTS

- **Looking to make your reports and chosen metrics more impactful for senior leaders?** One participant shared his key best practice.

- **Interested in the questions for Kelly's virtual exercise?** Four questions were asked to help understand metric overlaps and point to trends.

- **Wondering about how to prioritize the metrics that you share or should share?** Three key discussion points were highlighted in response to this question.

SPEAKERS

Kelly Schott (TheCR)

COMPETENCIES

Metrics & Measurement, Strategy

MATURITY PHASES

CMM1, CMM2, CMM3, CMM4

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OVERVIEW

- This was a call that asked participants to look at metrics through the eyes of their boss. In order to do that, Kelly used a virtual exercise to help improve participant's abilities to better present these metrics and, in return, ensure that they metrics are better received.

BEST PRACTICES

- **Ingrain it in the organization's culture to mark answers in the community as answered.** This can help with reporting, analytics and ROI.

- **Define and communicate "active participation."** Kelly asked how participants would help their reporting efforts to be more impactful for senior leaders. One participant said that he is often questioned about active users. He shows this, but also shows active participation. Then, of those active participants, which of those participants create content. Showing the participation separate from the activity is a true measure of what's really going on in the community. People can log-in and do nothing, but still be considered an active user. However, if they are actually engaged by liking, commenting, sharing and creating, that's the true measure. This is what this member tries to put forward in the reports, even if it's not being asked for by senior leaders. This participant added that it's also important to distinguish between active participants and contributors or creators. This point is noted in his reports because someone always asks about the difference. Kelly reiterated that it's very important to define active users.

LESSONS LEARNED

- Through a virtual exercise, participants shared their responses to the following questions. Some metrics may overlap. This exercise can help identify trends:

Question	Response #1	Response #2	Response #3	Response #4
Which metric(s) does your boss respond to/react to:	Average reply rate (the number of discussion topics that have been posted vs. how many replies that it receives)	Total user count or percentage of active members.	Total members, single-user topics	Consumption of content (views, clicks, repeat clicks), and engagement with that content (likes, comments, ratings)
Which metrics are you always providing/always answering questions about?	The most viewed topics in a discussion forum as it relates to that which is most important to the organization. For this participant, it's their safety technical talk because it is directly tied to the value proposition of community. This is where members get the answers to their safety questions.	COVID-19 related data. Any standards that are related to the pandemic are posted for free viewing in the community. This participant reports on the views weekly.	Total members, unique visitors, new topics, retention, % questions answered, single-user topics	Views, downloads (brand portal), desktop vs. mobile access, day and time most employees visit the digital workplace, # of sessions, average session duration, page views

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LESSONS LEARNED

Question	Response #1	Response #2	Response #3	Response #4
Which metrics does your boss want to explore further?	Average reply rate, discussion topics.	ROI related metrics. This participant has used this a couple of times in various presentations. People are constantly asking questions and trying to punch holes in the data. This participant used TheCR's cheat sheet and was able to defend all his numbers.	Retention (still not sure how to measure)	International vs. USA employee engagement with content
Which metrics doesn't your boss respond to, but you think it's important?	What is the value of an answer? This participant has a fairly new community and they are still proving the value of community in general. She has to work hard to make sure that the metrics that she feels are important get funneled up the chain. Not all posts warrant a reply. They may just be informational posts.	Unique visitors, most viewed topics, active members, qualitative data		Behavior analytics

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LESSONS LEARNED

- One member would like to segment his community's activity by their 3 audiences – staff, association members and general users. Currently, this participant can't segment activity by the type of user. He doesn't know if questions are being answered by staff or association members. Furthermore, they can report on answered questions, but because they have a multi-use case hybrid community, there are unanswered questions that sit in private member spaces. Usually they are managed by the project managers, but the project managers don't mark the questions as answered. However, they all are lumped together in the reporting, which doesn't provide a true picture.

- One participant has used an ROI calculator in the past, but warns that it should be used with caution. It was controversial because the results were a little too stellar. You have to be prepared to defend this figure.

LESSONS LEARNED

- Another member offered that he has a quarterly community scorecard in PowerPoint. The first couple of pages never change – the shared purpose, value and goal of the community. This sets the stage for everyone regarding the value of community. This participant reports to the VP of membership. As this VP was used to working with this participant as the director of members, he is comfortable presenting to senior executives using this participant's slides. All the follow up questions are answered by this participant.

- Kelly asked participants how they prioritize the metrics they share. She also asked if there were some metrics that would be prioritized for their personal use vs. what their bosses are looking for and how they balance what is reported.
  - One participant reports metrics in a large-scale PowerPoint that includes the average reply rate, discussion topics and other vanity metrics such as likes and log-ins. For the board year-in-review meeting she presents page views.

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LESSONS LEARNED

- It comes down to the organization's commitment to community because that helps inform the metrics that are most important to track. For instance, organizational change and shifting and competing priorities. This participant wants to gain an understanding of where to concentrate her efforts, since she doesn't have a cross-functional team and lacks centralization. It would also be beneficial to know, from an organizational context, the metrics that are important to other leaders in the organization. This participant tracks this and when these conversations occur, she ties it to the organizational priority at the time. However, these priorities may shift on a dime, especially in today's uncertain environment.

- Keeping the above in mind, Kelly asked this same participant what she thinks would make her reporting more impactful to her boss. Her reply was to contextualize the reporting within the organization's priorities. So, taking the value of a community, how it can be mobilized to inform new product development, what the members are talking about, etc. This participant does track and share these metrics with her boss on a monthly basis, but she's not sure if her boss then shares that at the director's table or with the CEO. Kelly has heard this – the lack of knowing what happens to the reports afterwards – quite often from other members, as well.

- This participant also works with a technology vendor consultant who gives her quarterly metrics tied to how well her community stands up against similar communities in areas like value proposition.

LESSONS LEARNED

- For those participants who aren't in a position to really answer these questions (they have very new communities), Kelly asked for their metric's wish list:

    - Overall ROI, but not just on questions. Additionally, the ROI of innovation discussions. For instance, one of the use cases for this participant's external community is to work with early beta testing. It would be useful to capture the value of that activity because that very much contributes to new product development and which features make it into the new product.

    - The value of a community member vs. the value of a customer who is not a community member. Salesforce has done a good job with this metric. This would be useful for sales people to encourage their customers to become community members because customers who are community members spend more and have greater adoption rates.

        - One participant, in reply to the above, said that he is looking into revamping the structure of his community. They would like a research and innovation space as there is opportunity there to show the ROI. They have been posting research papers on the community for the last couple of years. People will download them, but there are no questions asked afterwards. They would like to be able to tie innovation into ROI and value. Right now the ROI is just community in general. It's not broken out by community or area. This is something that this participant would like to do eventually.

        - Another participant is launching 3 strategic initiatives. She is also trying to think about how community can support those initiatives programmatically, as well as how to report on those initiatives. The above participant suggested that it's important to keep the reporting at a high-level, one page at the most. What's the value, how's it doing? Is it better than last month? Last quarter? Keep it simple and make it look professional so that it will be shared and, hopefully, make its way to the CEO.

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RESOURCES

- Kelly asked members to share who they report their metrics to and how frequently:
  - One participant does monthly tracking for the director of membership. That is reported out to their senior board of directors.
  - Another participant runs reports for himself weekly, monthly, quarterly and annually. He shares the monthly reports with his community governance team, which is made up of the membership team, strategic initiative managers and marketing. The various communities are also compared against each other to see how they stack up against one another and what can be done to improve engagement.
  - Yet another participant collects metrics on a monthly basis and reports any interesting changes in the metrics and/or trends on a monthly basis to her manager. There are 3 metrics that are shared with her department vice president on a monthly basis. That is reported by her manager. She is not sure if any of these metrics make it to the executive level.
  - Lastly, another member reports metrics every 6 months to the director of communications and then their cabinet and core leadership team. The core leadership team is made up of key roles across all departments and divisions.