Reporting Strategy: Sharing Metrics with Different Audiences

HIGHLIGHTS

- **Looking to advocate for value-based and/or behavior-based metrics?** Marjorie offered an excellent solution, backed by an example. Stephanie also shared a relatable example.
- **Thinking of updating your metrics to reflect your maturing community?** Marjorie and Stephanie shared their strategies, along with practical tips. Stephanie went a step further and showcased an amazing example of how she creates a narrative of the community. Her examples showcased the 'then and now' to visually display not only how the community has evolved, but also how her ability to showcase this evolvement has progressed.
- **Interested in defining an active user?** Marjorie and Stephanie shared their recommendations, while also giving feedback to a participant on her definition.

SPEAKERS

Marjorie Anderson (Project Management Institute), Stephanie Standring (ADP), & Kelly Schott (TheCR)

COMPETENCIES

Metrics & Measurement, Strategy

MATURITY PHASES

CMM2, CMM3, CMM4

OVERVIEW

- **Background Marjorie Anderson.** Marjorie is the Product Manager for Community at the Project Management Institute (PMI). PMI is a professional community that supports those in the project management profession and those who use project management skills to do their jobs.
    - Marjorie's department sits under Products, Events and Solutions. They have a general portfolio called: "Membership in Community."
    - Marjorie's team consists of herself and 3 engagement specialists. She also has a data analyst, as well as a content editor and someone responsible for video production and editing.

OVERVIEW

- **Background Stephanie Standring.** Stephanie is a Collaborations Program Manager for ADP. She has been with ADP for 15 years.
    - ADP is primarily known as a payroll company, but they also provide a breadth of various HR services.
    - Stephanie manages the operations of the Collaborations Program within ADP globally. She is part of a team of 3, her manager, herself and another programs manager who is responsible for administrative tasks.
    - They use a Hub and Spoke model. The program managers manage the platform and then community owners sit underneath. They are assisted by and collaborate with Stephanie and her team.
    - Stephanie's team reports to their leader's, but the community owners also report to their leadership, as well.
    - They have a few use cases within their Program. One is communications. There are the corporate BU, regional intranets, etc. They also have scaled support that uses a question and answer model. Knowledge management is also included in there, as well as communities of practice.
    - Another popular area is ideation. Those are also primarily on a BU level, as well.

LESSONS LEARNED

- In a Q&A format, Kelly asked Marjorie and Stephanie questions related to metrics and their respective audiences when it comes to sharing reports:
    - ***Q. Which reports do you work with currently in terms of metrics? In other words, which reports do you share, create, present, etc?***
        - Generally speaking, Marjorie reports on traffic and engagement, as well as content performance. They depend heavily on community content. It is used not only in the community, but across the organization for various products and experiences.
            - They report on product performance and the original membership transaction that took place as a result of an action taken within the online community.
            - They also report on Voice of the Customer (VoC) data. They are hooked into the VoC capability and reporting data.
            - They help with event reporting where there is the element of community present.

LESSONS LEARNED

- Stephanie reports to her leadership team on growth, i.e. whether or not they are consistently growing quarter-over-quarter.
  - Another big aspect of their reporting is for the company's Annual Report. For this Report they look at adoption, usage and value.
  - Stephanie also helps the site managers, which can involve different types of reporting. They typically look at the adoption and growth of their communities, as well as their survey results. They survey their users each year to obtain feedback. In the Annual Report, they share what their users are telling them about their community.

LESSONS LEARNED

- ***Q. Who do you share these reports with across the board?***
  - Stephanie explained that her management receives the quarterly reporting, which then goes to their management. It's a consolidated view with only a few data points because they do look at it as a dashboard for not just the community area, but also client services. In particular, they share the number of active users and how many views the sites receive. It gives them an idea of how many people are in the sites quarter-over-quarter.
    - The Annual Report goes to the entire company and includes site owners, end users, etc.

LESSONS LEARNED

- Marjorie's weekly reports go directly to their portfolio director so that she is aware of what's going on in the community and the outcomes achieved. On a weekly basis they talk about engagement, what has been accomplished from a programming perspective and challenges that they are encountering or may expect. Marjorie wants to ensure that the portfolio director is prepared for any questions she may receive from leadership.
  - Then there is a monthly report that provides higher level engagement information to their VP. It's numbers with a narrative. Leadership sees traffic, but then they also see another set of numbers that shows what's happening once people are in the community. It's used to speak to the bigger business goals.
  - They do an annual "Year in Review" within the first quarter of the year that goes to their director, VP and CEO.

LESSONS LEARNED

- ***Q. How do you determine what metrics make it into which reports?***
  - For Marjorie, since there are so many different audiences that receive different metrics, it comes down to who needs to know what. At a senior level, they will want to know how the different activities and metrics tie into the bigger business goals and the progress against those goals.
    - Taking that a step down to their portfolio leader, she is directly responsible for the overall program goals. Therefore, she needs to know how they are performing on a smaller scale, i.e. what performance looks like in terms of programming and are they moving the right pieces forward. She wants to be able to help Marjorie and her team if they get stuck.
    - The best advice Marjorie can give is to look at the need, why each audience needs certain pieces of information and then determine how to get it to them in a way that makes sense. It comes down to value and that can only be assessed by taking the time to ask what is needed.

LESSONS LEARNED

- Stephanie concurred. It very much depends on the audience. What are they looking for in these reports? Is it something that will tell them the value that the community is bringing to the organization? If so, how can you surface that type of information? Or do they just want to see that the community is growing and/or stable?
  - For Stephanie's leadership, they are looking for a little bit of both, i.e. is the community still providing value and, if so, how can they illustrate that through the dashboard? At the same time, can they also demonstrate that they are growing quarter-over-quarter? If not, you need to be able to explain why. For instance, at certain times of the year – such as July and August – usage decreases because many of their overseas clients go on vacation. So, there is an explainable, but drastic dip in community usage.
  - With regard to their Annual Report, since it is such a broad audience, their main focus is to get people to read the Report. She wants people to be aware of what's happening in their collaboration program, in the community, etc. How did the last year go? How do they compare to the industry? Stephanie has a unique way that she hooks the masses (vs. leadership) into reading the Report, which is shared below.

LESSONS LEARNED

- ***Q. How do you advocate for value-based and/or behavior-based metrics within your reporting, particularly the more complex metrics?***
  - Marjorie cautions that when people ask for specific information, she always asks in return “What is that going to tell you about the value of the community?” Sometimes it’s valid and other times it’s not. For example, about a year and a half ago the new user count in the community slowly started to decline. Marjorie always put a disclaimer on this number, especially in the summer time. However, this decline was occurring outside of the norm. They were seeing a slight dip in new users and her VP at the time wondered if this was concerning. Marjorie explained that she wasn’t concerned because the engagement numbers were increasing. Other data showed that an growing number of people were returning to the site and they were sharing content.

LESSONS LEARNED

- In summary, the new user metric doesn't tell you much about the health of the community, other than new people are joining. However, if you can tell a story about how this metric, coupled with other reporting pieces, creates trust among members who continue to return because of value received, that is much more important.
  - Respectfully challenge people's thinking and help them to see the bigger picture. If they still want to see/know the numbers, then, of course, provide them with the data.

LESSONS LEARNED

- Stephanie echoed Marjorie's comments and added another example. If you think about increasing community searches, that could mean 2 different things. It could mean that people are searching and finding what they need or it could mean the opposite. So, you have to be careful and truly understand whether it is a valuable metric because someone else might see it differently.
    - Stephanie also advocates for asking what the person sees as valuable. They get a lot of that information through their annual surveys. It helps them to be able to dive into the user behaviors, how frequently they are visiting the community, whether or not a search is helpful to them, etc. Also, as an organization, NPS (Net Promoter Score) is a sought after metric. Therefore, they tie NPS into many of their products. It is a metric they assess year-over-year. They ask: *"Would you recommend our community to a friend or colleague?"*

LESSONS LEARNED

- ***Q. How have you made the transition over the years from a newer community with metrics that reflect that newness to metrics that reflect a more mature community?***
  - For Marjorie, she knew it was time to transition when the numbers were no longer making sense. She recognized that they were evolving as a Program, but the metrics had not yet evolved with it. For instance, reporting on user registrations, number of connections, etc. Therefore, she created a report called: "The State of Community" and submitted it. It showed how far they've come, missing data that could tell them what's happening within the community and whether or not people are engaging. Once she communicated that across the organization, people started to get it. It helped her to uncover areas that could be used to tie their metrics to organizational goals. In other words, to tell the story of whether or not people are engaged in the community, but also whether or not it is providing value across the organization.

LESSONS LEARNED

- This allowed Marjorie to introduce engagement metrics. As they began to shift as an organization and as a Program, they were able to assess other areas in which they could provide value, as well as the places that needed change.
  - Therefore, Marjorie's recommendation is to pay attention to the evolution of your program. By doing so, you will begin to see where the metrics need to change. You can't report on the same metrics for the life of the community and expect to show a level of maturity and value that goes beyond your initial reporting. Take a step back and examine your community. See how things are moving outside of the day-to-day. That will help you to understand what metrics you need to shift. You can still report on the vanity metrics, but you also have to report on what's happening in your community and the value provided.
    - When Marjorie first did this, she showed all the touchpoints of the community across the organization in the past year and how they helped to move the needle. In other words, the initiatives in which they worked with the different lines of business to help shape the metrics.
    - Marjorie is at that same point now again in their maturity curve. Kelly added that this is a great reminder that metrics continually need to be revisited; measurement never stops and is never complete.

LESSONS LEARNED

- Stephanie added that as your community evolves, take a look at whether or not your reports are evolving along with it. Stephanie used to do monthly reporting for the entire community. She noticed that they weren't seeing shifts. After a while, people stopped viewing the reports because there wasn't anything extravagant happening. Therefore, they transitioned to annual reporting so that they could really highlight the big bang events.
    - Stephanie shared that they do showcase the vanity metrics, but also provide benchmark metrics to show how they compare to others in their industry. This gives people a sense of pride for their contributions because they are one of the top tier performing communities within their industry.
    - The feedback that Stephanie receives year-over-year with these Annual Reports also helps with metric evolvement. People ask for other pieces of information, which helps her to dive deeper into what people want from the Report. This can be tracked for the next report.

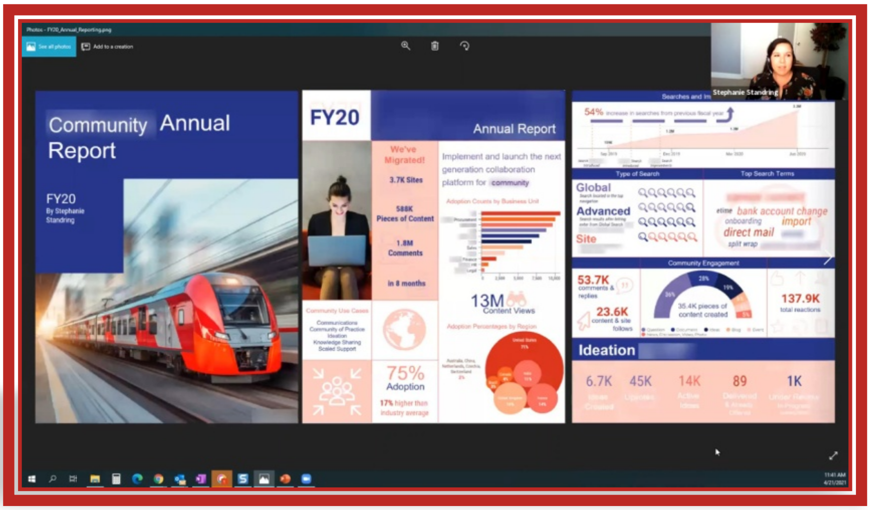
LESSONS LEARNED

- ***Q. How do you create a narrative around these reports to create a full picture?***
  - Stephanie said that this has been a journey. It's not something that happens over night. When she first started with the annual reporting in an infographic manner, the first attempt wasn't, admittedly, the best representation. However, with time and feedback, she has been able to make the Reports better each year.

LESSONS LEARNED

- Stephanie cautioned that it takes time and is a learned skill. She showed a screenshot of her first iterations vs. what they look like today:

FY17



FY20

LESSONS LEARNED

FY16

- Stephanie explained that when she looks back on her first iteration, she feels that it was very busy and didn't tell a story. However, as it has progressed each year, she has begun to formulate a story by adding different graphics that make it more appealing.
    - FY17 highlights a goal so that people know the objectives of the Program.
    - FY20 again shows the goal. However, with this iteration Stephanie received assistance from their branding division so that she could tie into the company branding standard. Stephanie really wanted to show the survey data because that's where she feels community value shines through.

LESSONS LEARNED

- Marjorie uses the written word or slide decks. This helps her to baseline where they were at the beginning of the year and year-end accomplishments. She also shows how they were able to measure these outcomes, which helps to set them up for new successes moving forward.
  - Marjorie also works very hard to connect to the business goals. Leaders want to see that connection because it justifies why they should continue to spend money on what is essentially considered a cost center. They don't bring in direct revenue, but they help practitioners learn from one another. It's a hook that helps them to find value in the rest of the offerings provided by the organization. Therefore, Marjorie works to show where they've made an impact in achieving those company goals across the business. For instance, looking at the VoC. The community is rich with information and opinions on the Voice of the Customer.
  - Marjorie really likes the infographics ideas presented by Stephanie.

LESSONS LEARNED

- Stephanie stated that she has made the mistake in the past of assuming what different audiences might be looking for in the reporting. It creates a lot of back and forth and, in some cases, raises even more questions. Therefore, her advice is to ask upfront so that you can give them what they need immediately.

- Presenting to the different audiences can help you to be seen as a knowledge expert. Look at it as an opportunity to showcase your value.

- When it comes to defining an active user, Stephanie stated that it depends on your platform reporting and what's available to you. If you know your entire company base, you can take the number of people who visit your site month-over-month and then get an active/inactive number. Some reporting actually tells you your active users, but she is not sure of their formula for arriving at that number.
    - Marjorie shared that since their community is built on a custom platform, they are able to define active vs. non-active. They define active users as someone who has visited the community within the past 3 months. This is reviewed monthly. If they see that there are users who have not visited the community within the last 3-6 months, they are not included in the active user count.

LESSONS LEARNED

- One participant shared that they used to define an active user as active within 30 days, but then dropped it down to activity within a month. She asked for Marjorie and Stephanie's opinion on that metric:
    - Stephanie replied that this participant should examine her user base. Think about whether or not people are coming to the community once every 90 days or if they are visiting more frequently and why. Truly understand your audience and what they are using in the community. This will help to answer the question of how frequently the data needs to be pulled. For ADP, they look at it month-over-month because there are people who come in once a month, as well as those who visit multiple times per week. If their use case was more lax, 90 days might be an appropriate metric.
    - Marjorie explained that since her community is an internal community, they look at it a little differently. Jive does have a number, but active is defined as just a log-in. However, logging in only means that the user has viewed the landing page. It doesn't mean that he/she has read anything. Therefore, Marjorie upped that definition to define active as: *"Having performed an activity within the community and gone beyond the landing page."* In other words, the user has read an article, viewed someone's profile and/or took some sort of action.

LESSONS LEARNED

    - However, they also have a stat that looks closer into the activity. So, of those who are active, how frequently are they active? This way you can dig in a little further to get a picture of the activity level.

- When it comes to tools, Stephanie suggested Microsoft Forms as a great survey tool. It's been very helpful because it also gives her graphs based on the survey result data. They are a Microsoft shop, so this is very helpful, in addition to old-school Excel. Although she doesn't use it personally, Stephanie says that she has heard good things about Tableau, which others use within the organization.
  - In the early days, Marjorie successfully used Google Analytics. However, as the community grew, they switched to Adobe Analytics organization-wide. It has been an amazing tool to help provide robust information from which custom reports can be generated. It helps them to get at the information that can't be obtained from their custom-built community platform. Adobe Analytics has been integrated into the platform. As well, they use Qualtrics for surveys. So, they have a great suite of analytics and reporting from an enterprise-wide standpoint that they can take advantage of for providing some exemplary data. Marjorie also gives kudos to Tableau.

ADDITIONAL INSIGHTS

- **Kelly asked participants to share what they report on, who they report to and how often:**
    - A Tableau dashboard that is shared with the C-Suite.
    - Report metrics to immediate manager in HR and to the manager of engagement.
    - Report monthly and quarterly community metrics to the director of service delivery. Also informs the entire service delivery team monthly, but on a more general basis.
    - Report metrics to sponsors.
    - Report to the director who then reports up and out.
    - Share stats such as discussion forum posts, number of webinar attendees, and number of community members. Looking to up the sophistication level of the reporting.
    - Others were on the call to learn.