



(Roundtable) Who’s Pitching What? Building Out a Community Governance Model for a Customer Community

SNAPSHOT

SPEAKERS

Claire Flanagan (Cloudera) & Kelly Schott (TheCR)

COMPETENCIES

Strategy

MATURITY PHASES

CMM1, CMM2, CMM3

HIGHLIGHTS

1. **Planning to create a business strategy?** Data is essential. Claire’s multi-faceted approach used 4 steps to gather strong data.
2. **Looking for an FTE formula?** Claire explained in detail the formula they use to calculate FTE to answer questions in the community.
3. **Interested in which problems Claire needed to overcome?** Five problems and their solutions were shared.

OVERVIEW

- **Background Claire.** Claire is the Business Owner of the Cloudera Community and Knowledge Program. She was on the call to share the strategy taken to go from organic to mission critical, as well as the path taken to pitch strategy and governance. More importantly, she has asked many members for help over the years and now she’d like to pay it forward by sharing the things that she’s learned.
 - Claire works in the Support Organization, which provides follow-the-sun support across the globe.
- **Background Cloudera.** Cloudera is a data company. They provide data solutions that allow their customers to transform complex volumes of big data into something that can provide clear and actionable insights. They do that in the form of both private and cloud-based solutions so that customers can get the information that they need in order to automate and be more predictive.
 - These solutions help customers figure out how to grow and connect their business through the collection of

CASE STUDY – CLUDERA

- **Cloudera community.** The Support Organization is FCP certified, which means that they take into consideration over 100 factors to certify support operations and the maturity of their support operations. They have achieved this certification for the last 3 consecutive years. This ensures that they can help their customers achieve success as well as ensuring that they deliver the right solutions to support and properly service their customers.
 - The community launched in June 2013. It was a grassroots effort that has experienced organic exponential growth year-over-year vs. having it tied to an actual strategic support outcome. They saw the need, they knew it was important and they worked to get the funding to make it happen.
 - In the last year, again without that strategic direction, they have seen organic exponential growth both in terms of membership visits and average month-over-month visitors. There has been an increase in solution views, as well. The platform has achieved a certain amount of success.
 - Claire joined the organization in January 2018. The community was a team of one. It did move under Support Planning and Programs, but it didn't have strong business ownership. The roadmap was driven by the technical team. Consequently, what was released was technology-focused and did not meet community business objectives. At the same time, the Support Organization had grown exponentially to the point of double digit growth. This meant a growing support scale. They support products in the Open Source industry and that often means that support calls can be lengthy and expensive. Customer case volume was high and as much as they were trying to scale, they knew they had to do better on the one-to-many options. So, they needed knowledge articles, community answers and others sources to help scale over time.
 - Claire was brought onboard to help with the one-to-many problem from a support strategy perspective. To justify resources, they needed a strategy and to justify a strategy they needed data.

- **Don't believe me. This is what the data says...** Gathering the data was a multi-faceted approach.
 - **Benchmarking.** The first step was to reach out to their platform vendor, Lithium. They had a lot of data. The benchmark they looked at was key performance metrics against their customer base and against a set of peer reference groups. They also took a look at another industry program assessment, which helped them evaluate their practices.
 - From this they learned where their strengths were, as well as where the gaps were in order to put together an action plan.

CASE STUDY – CLOUDERA, CONT.

- **Internal interviews.** They interviewed their support engineers, many of whom were volunteers who took the time to answer customer questions. These interviews were videotaped.
 - What they learned from this were best practices from the field for engaging with customers in one-to-many type answers, as well as what it took to provide a quality community-based answer and/or self-help type articles.
 - **Peer interviews.** Through peer interviews they learned the average time it took them to provide a one-to-many answer vs. answering a support case in a one-to-one troubleshooting format. TheCR Network and others at AWS, HWX, Cisco, etc. very graciously helped them to gather data to answer this question. These peer interviews helped them to learn the role that community plays in their support organization, how they deal with support engineer goals and whether or not the goals are formal when answering community questions or if they are more organic. They also learned some best practices for driving engagement and tying community answers to support engineer goals.
 - **RFA – TheCR.** TheCR members were asked how they staff their programs. Members from 9 different companies provided very specific staffing models, which was incredibly helpful. The data assessed role types, size of teams and sample job descriptions.
 - **Other data.** Lastly, they looked at their own community data and support case data. That helped them with the average cost of a support case, the average time to answer a support case and the average level of effort to complete daily activities.
- **Estimating full-time equivalent (FTE) to improve community answers.** This looked at past company growth and made some assumptions about expected growth for the next couple of years.
- Next they examined an answer rate goal. For Claire, that goal was “no question left behind.” The reality is, however, that when you hit 100% target, you’re adding cost and scale. They were nowhere near 100%, but they knew that they needed to set some reasonable targets.
 - They set a targeted answer rate and the percentage that they thought employees should answer. The goal was to grow the latter so that it is not all brand answers and brand dominated.
 - Next they looked at the average time to answer a quality one-to-many answer. This data came from their support engineers, resulting in fact-based data for what would be needed to make the community a little more strategic.
 - This amounted to the creation of the following formula: Estimated # of questions/year X targeted answer rate X % Expected employee answers = Employee answers per/year
 - # of employee answers/year X average time to quality 1:many answer = Expected annual FTE staffing

CASE STUDY – CLUDERA, CONT.

- **Building the community strategy.** All of this data helped them to put together a community strategy.
 - **Data drives assessment and an action plan.** By examining the community benchmarks, i.e. key processes, assessment, what Lithium said, etc., they were able to figure out where they were on the scale assessment, where they needed to focus their priorities in the upcoming year and how to best set their goals to close the identified gaps.
 - **Map community to support strategy.** Next they mapped their community gaps or strategy to the support initiative discussed earlier. All the community priorities were tied to what it meant to drive and support that one-to-many initiative and to scale their resources more effectively.
 - **Roadmap tied to support outcomes.** That was translated to their program strategy with some very specific objectives and key desired results. This helped them to formulate a roadmap. They created a crawl, walk, run strategy that identified use cases to be folded into the platform and their technical projects. It also helped them assess organization readiness.
 - **Governance to drive the roadmap and expand.** All of these factors were compared against what they wanted to achieve. Based on the information they gathered, they developed a strategy to staff to those critical areas. The executive level bought into this strategy.

- **Problem – no business owner.** Once the community was moved into support, support didn't feel that there was a business owner from a strategy perspective. They made the business case for a formal business ownership at the company level so that it was very clear that there was a vested interest, yet they were the ones driving the requirements. The solution was for support to assume the business sponsorship. This solution was approved.
 - Claire finds that there is always talk about the community and/or engagement manager roles, but the real success of the program lies on other roles that aren't often part of the discussion. The other roles are the ownership and other business roles and functions. They also had to deal with their other stakeholders to make those responsibilities clear to ensure good decision making.

- **Problem – the technology team drove the roadmap.** The solution was to assert business ownership and clarify responsibilities. As mentioned before, their roadmap was very technology driven; objectives were driven by how the community could support technology goals. The priorities did not map to things that they had resourced. Part of the strategy presented and approved asserted where the responsibilities needed to be and how they needed to partner moving forward. This is still very much a work in progress. It is helpful to align expectations to these responsibilities while continuing to partner with these relationships.

CASE STUDY – CLUDERA, CONT.

- **Problem – community isn't just a support problem.** The solution was to establish a framework to scale topic communities. The first thing they needed to address was that this wasn't just a community support function.
 - The second part to this problem was the realization that they didn't want to staff to every single use case that might come their way from the business. They started by establishing a framework so that they could grow and scale as per the business unit requests. So, when they get asked to start a new community, they ensure that they have a business sponsor, i.e. someone who cares about the outcome and ties it to their strategic objectives. They insist on a business sponsor and a community manager for each topic.

- **Problem – the community answer rate was lagging.** The goal was to become the destination where their members could trust that their questions would get answered in a timely manner.
 - **Community operations.** They are in a technical area and this is the one space where Claire can't go in and answer a technical question. They needed to identify the scale and volume for what they needed and what they could expect. This was the synergy of a few key roles, whether or not they were dedicated on the community team or they were distributed. They needed to take care of community operations to keep the community healthy.
 - **Engagement & programs.** They also needed to do much better on engagement to identify, nurture and reward their internal subject matter experts or their super users. They needed to grow peer-to-peer answers and the solution rate. Someone needed to be focused on those goals.
 - **Technical content & answers.** There needs to be a certain amount of brand interaction in a technical community. Therefore, they worked to improve their self-help knowledge and community answers. They proposed this model to address that need.

- **Problem – no program governance.** The solution was to establish strategic, operational and tactical governance for business and technical roles. This involved thinking about the layers needed for sponsorship and making sure that someone ensures that resources are assigned and goals are aligned. For instance, one of the roles needed was to ensure that the objectives are translated into the program outcomes. Claire has found that they spend a lot of time thinking about the community manager roles, but it should be more about the ecosystem of stakeholders and how those stakeholders help to achieve the pre-determined goals.

CASE STUDY – CLUDERA, CONT.

- **Community core team.** Claire broke down the FTE count with their roles and responsibilities. Her role is in addition to the 4 listed below.
 - **1 FTE for operations.** Responsible for day to day community management, moderation, time to answer/solve and new use case onboarding.
 - **1 FTE for engagement & programs.** Responsible for member content and programs, champion and SME programs and rewards and incentives.
 - **3.5 FTE for technical content.** Responsible for technical knowledge articles, community answers and innovative content delivery, such as videos, YouTube, etc.
 - **.5 FTE for data analytics.** Responsible for community and knowledge metrics, metrics for prospects, customers and employees and question/answer/solution rates.

- **Community and content program governance.** This model needs a steering community and a working group, which will be launched in 2 layers to help them with an overall governance structure.
 - For the working group, they know that they have to make sure that they identify key individuals either in the support organization or in their sales or sales engineer teams to give them feedback for their plan, advise and share ideas, as well as help them to implement solutions.
 - They also need a key set of stakeholders who have an approval function and will be responsible for the cross-functional sign-off on plans that aren't just support or technology related, but may very well be related to marketing or engineering.

LESSONS LEARNED

- The VP of support was the one who approved the strategy roadmap and governance model when they didn't initially have a business owner. This was a reminder to him that this was tied to his goals and initiatives. This data showed him that they knew what it took to manage a community and could help him scale so that he didn't have to hire support engineers exponentially. The community would be able to help with some of that deflection.
- Along the lines of the above, data is key to gaining support and buy-in. They did have an ROI for support. They knew the average cost of their support cases and they had the data for what they thought it took to answer a good community question. That showed a savings, which gave the VP of support the confidence to approve this strategy and get behind it as an executive.
- One of the things that they look at when they measure success of the community beyond just overall members is audience type and deflection of their customers who have support contracts with them. There is an incremental increase of return customers, not just members. This is an excellent ROI metric.
- Claire's community platform is an older version of Lithium. It needs an overhaul in a number of areas. They are taking this as an opportunity to think about structure to fix the mess. They will be taking the Lithium Responsive Upgrade, they will be applying a new design to simplify the structure and try to take on some of the best practices that Hortonworks (their parent company through a merger) did better than them.
- There wasn't a lot of pushback from other parts of the business, likely because of how the community grew so organically. In terms of establishing a business ownership with many of the other functional groups, there wasn't as much pushback on that because they are still on the technical side of it. They are where that line of demarcation exists.
- An active member is defined as someone who actually comes into the platform. They are the ones who are logging in; they are not guests. To like, comment or otherwise contribute activity is an engagement metric. Their engagement metric has not yet been fully defined. Claire likes the idea of engagement tiers.
- To date, they have not rewarded their champions in the community. However, this upcoming summer they plan to institute a reward structure and a gamification program to support their champions.

ADDITIONAL INSIGHTS

- Kelly asked participants to describe how their community is staffed.
 - Most of the responses spoke to a small community management team, i.e. 1-3 people. Most have to turn to part-time help (people have other jobs besides community) and/or outsourcing on an as needed basis.
 - One participant described an “unstaffed model”, which consists of 1 community manager and 2 IT tech support people who support Jive Instance.