Community Platform Built for Community Managers

The Community Roundtable’s online community, TheCR Network, is powered by Higher Logic.
This publication features data and analysis from The State of Community Management 2017 survey received through March 2017. Community professionals are encouraged to take the survey - which remains open now - and receive their community scorecard at [http://the.cr/socm2017survey](http://the.cr/socm2017survey). Knowing your own scores will help you pull more valuable information from the survey data.

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At The Community Roundtable, we collaborate with clients to identify proven, practical strategies for better communities. We believe communities accelerate an organization’s potential by connecting employees and customers in meaningful ways. Clients rely on our models, practical research, and peer networks to take their communities to the next level.

The Community Roundtable has developed models and associated research platforms that inform programming in TheCR Network, our training offerings and our advisory services. These models include:

- The Community Maturity Model
- The Community Skills Framework
- The Social Executive Framework
- The Community Engagement Framework

Over 200 organizations have relied on The Community Roundtable’s services, including Adobe, Aetna, the American Academy of Arts and Sciences (AAAS), Autodesk, CA Technologies, H&R Block, Microsoft, SAP, Steelcase, The World Bank, and Verizon.

Learn more about The Community Roundtable and TheCR Network at communityroundtable.com.

Our launch partner:

Higher Logic is an industry leader in cloud-based community platforms. Over 1,000 organizations worldwide use Higher Logic to bring like-minded people all together, by giving their community a home where they can meet, share ideas, answer questions and stay connected.

Higher Logic aims to empower engagement, collaboration and community evolution, which we believe are the fundamental elements to the long-term relevance of any organization. By fostering community growth, you can open up a world of possibility. Tap into the power your community can generate for you. www.higherlogic.com.
Welcome to The State of Community Management 2017

Welcome to the eighth edition of The State of Community Management. Thanks to your support, it has become the most read and most often cited resource in the community management space.

It also presents a challenge. How do you keep a resource like this fresh each year when, as any community manager can tell you, communities and their best practices don’t shift radically each year? We do this in three general ways.

First, our longevity has afforded us the ability to look at how the answers to questions have evolved over time. In some areas, there has been no measurable change – as the community field (and our survey base) expand, new communities taking the survey mask some of the progress older communities have made. But in other areas, such as engagement, we are seeing shifts that signal fundamental changes in how organizations and community leaders approach community. While we caution comparing year-over-year data, because our sample shifts each year, these are still important takeaways.

Second, we are continually tweaking the survey to gain new insights. This year, for example, we took a more granular approach in our questions about policies and guidelines, as well as content and programs, and we asked respondents about their own year-over-year trends. All of these are reflected in more detail in the text.

And third, we take a look back at our key findings from the 2014-2016 State of Community Management reports, to make sure what we found then still holds true today. Don’t let the annual publication of the report lead you to assume the older versions are outdated. In fact, we often tell new community professionals to go back to the qualitative SOCM 2011 and SOCM 2012 reports for ideas on how to move their communities up the levels of the Community Maturity Model.

Since our first report, our own work has evolved and grown. The Community Maturity Model has been supplemented by the Community Skills Framework, Social Executive Framework and most recently, the Community Engagement Framework, which highlights four valuable types of engagement in communities: Validating, Sharing, Asking and Answering, and Exploring. These core behaviors, common across community use cases, are what drive communities to succeed, and focusing on the value of these behaviors as they apply to your community can provide you with a structure on which to track your community maturity and success.

These are exciting – and perhaps a little scary – times for communities. We need to demonstrate, articulate and measure the value of community to new audiences, many of whom are not the ‘believers’ that our early adopters were. And as we note, winning over that more skeptical audience requires new tactics. In a world drawn to the new and flashy “next big thing”, saying we need to double down on doing what we do in communities and doing it better doesn’t sound very innovative. But don’t forget, what experienced community professionals feel is ancient history is new, challenging and exciting for legions of new and maturing community practitioners.

We hope you find this report inspiring and encouraging, and can use it to generate new ideas and reinforce critical elements of creating successful communities. Dig in and enjoy, and share your thoughts with the #soCM2017 hashtag.

Rachel Happe  Jim Storer
The Community Maturity Model

The State of Community Management research uses the The Community Roundtable’s Community Maturity Model (CMM) as a framework for defining and evaluating the performance of communities and community management. The CMM defines the eight competencies our work has shown are required to build successful communities, and articulates how these competencies progress from hierarchical organizations to those that embrace a networked approach to their business.

The eight competencies in the model are the building blocks of a productive community.

THE COMMUNITY MATURITY MODEL IN PRACTICE:

While our research is presented annually, each edition has its own focus and key findings, which remain valid over time. Community professionals can gather insights and ideas from any of the past reports that they can use to apply the CMM to their current community practice. You can access past reports at http://www.communityroundtable.com/SOCM.

EXPLORE THE MODEL:

Ideas for exploring the model can be found throughout our research. The 2011 State of Community Management Report, for example, covers the practices of each competency. The 2012 report defines how an organization moves through the stages of maturity. More recent reports measure and highlight the common elements of successful communities.

The Community Maturity Model competencies serve as the underpinning for on-demand training in TheCR Academy. Our Community Manager Fundamentals courses provide critical skills for managing community, and Community Program Essentials gives program leaders valuable skills for integrating community into organizations.
Using this Research

The Community Roundtable’s research aims to provide immediate value to community practitioners by capturing the current practices of community management. It is framed by and structured around the Community Maturity Model, which provides a common context for talking about the different aspects of community management.

USE THIS RESEARCH TO:

- Validate your approach
- Prioritize your resources
- Inform conversations with stakeholders
- Educate staff
- Assess the maturity of your program

Community program leaders have leveraged the CMM framework and related TheCR resources to build roadmaps, provide internal consulting and shape community strategy.

Community Performance Benchmark

If you find our approach to measuring community maturity valuable and would like to dig in more deeply, TheCR’s Community Performance Benchmark can help. Benchmarking provides a valuable assessment of where your community stands along the Community Maturity Model, benchmarks your community management processes and provides you with independent, experienced recommendations for strengthening your community performance.

USE THE COMMUNITY PERFORMANCE BENCHMARK TO:

- Assess your community management maturity – the investment that produces results
- Deliver an unbiased perspective on the progress of your community program
- Justify or revise your community roadmap to ensure you hit your goals
- Identify potential gaps and unrealized opportunities
- Plan and budget smartly for the future

The Community Performance Benchmark is particularly valuable ahead of strategic and planning meetings or where more executive education is needed to ensure support for a community program.

For organizations just getting started with a community approach, The Community Readiness Audit follows a similar format with an eye toward identifying the elements most critical for getting a community approach to take root.

For more information, contact The Community Roundtable: info@communityroundtable.com
Executive Summary: The State of Community in 2017

This State of Community Management report is the eighth in TheCR’s series of annual snapshots of community management. Since its launch in 2010 as a way to capture best practices in community management, the report has evolved into an annual quantitative examination of how communities approach the strategy, operations and tactics of effective community management.

This year, we see several emerging trends that are shaping communities and reflect both the perception and reality of community management in 2017.

TREND: Optimistic perceptions foreshadow emerging success for community.

For 2017, we asked for the first time not just where communities stood across a number of areas of community management and practice, but how their budgets, staffing and key indicators had changed over the past 12 months. The results were quite positive. Respondents were three times more likely to say their staffing and budgets had grown over the past year than that there had been cuts.

Perhaps more remarkable, respondents said that they had seen growth across key indicators, such as activity, questions answered and value generated. Respondents were ten times as likely to say their community or community program was generating more value year-over-year than they were to say it was generating less.
TREND: Communities can demonstrate ROI – if they have the data.

With increased investment and executive interest comes increased pressure to demonstrate results. However, the vast majority of respondents said they could not yet measure the value their community generated, and only a small subset of those who could measure value said they could use it to calculate the ROI (return on investment) of their community.

Can you measure value and ROI for your community?

As we have noted in past years, the ability to measure results is a critical differentiator between average and best-in-class communities.

In an effort to give community professionals a more accessible and defensible way to measure ROI, TheCR developed a simple ROI calculator that uses the answers available in a community as the locus of value. The formula takes into account both answered questions and searches that lead to answers, and multiplies them by an average “value of an answer” to get a financial result. The search component is critical to this calculation. It provides the “networked value of community” that grows from the fact that communities are uniquely able to transparently capture and resurface vetted and verified information. However, many organizations struggle to determine the number of questions being answered in their community, and the number of times those answers were surfaced in search.

Just 15% of the communities who took the survey - 51 of 331 - were able to provide the 5 data points (number of answered questions, number of searches, search success rate, value of an answered question and community cost) to use even our simplified ROI formula.

Most remarkable, nearly 60% of communities said they had no way to know how many searches had been performed in their community. Since answering questions and searching for answers are such powerful elements of community behavior, platform vendors need to do a better job of making these critical behaviors more easily accessible in their metrics and dashboards.

But there is good news. For those community practitioners who can calculate their ROI, the results are impressive. More than half of those who said they could calculate it themselves had an ROI over 100%, and of those who provided the data needed to use our calculator, 71% had a positive ROI.
KEY FINDINGS: 2017 State of Community Management

The growth landscape for communities is encouraging, but what kinds of things are the best communities in our sample doing that others can adopt? We examine this question each year by comparing the overall sample with a “Best-in-Class” group of communities – those who scored in the Top 20% overall on the survey scorecard. While some indicators show little variation between average and best-in-class communities, others delineate sharp differences.

Each year we highlight the most notable data in strategy, operations and tactics in our key findings. These findings tend to hold true over time, and together can provide powerful insights to accelerate your community success. (To review the key findings for the past three years – and how the research has held up – you can turn to page 16.)

STRATEGY: Quality of engagement matters more than quantity as communities mature.

When we began the State of Community Management quantitative survey, our best-in-class communities demonstrated higher percentages of members actively engaged in community than the overall sample. But the gap has narrowed over time, and this year, it disappeared entirely.

That raised some eyebrows. By exploring in greater depth, however, we see a number of elements at play that help explain the change and even suggest a subtle but seismic shift in the way communities evaluate their own success.

First, we found our overall best-in-class sample has evolved: Our best-in-class roster for 2017 includes a number of large external communities, which typically have a lower percentage levels of member engagement than other use cases.

Best-in-class communities had no higher community engagement than the overall sample...

That could explain some of the decline in best-in-class engagement, but we found that even within subgroups, best-in-class engagement was similar to overall engagement. For example, we found our best-in-class internal communities had similar engagement to the overall group of internal communities, too. So what makes best-in-class communities stand out? It turns out that the best-in-class outshine their peers in quality of engagement, rather than just quantity.
...But best-in-class outperform peers on a number of metrics around quality and community success.

Some examples: A higher percentage of best-in-class community managers noted gains in member activity, questions answered and value generated over the past 12 months than the overall sample. They also had a higher percentage of their content generated by members rather than formally generated by the organization.

<table>
<thead>
<tr>
<th></th>
<th>Overall</th>
<th>Best-in-Class</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value Generated</td>
<td>62%</td>
<td>86%</td>
</tr>
<tr>
<td>Questions Answered</td>
<td>61%</td>
<td>73%</td>
</tr>
<tr>
<td>Active Members</td>
<td>64%</td>
<td>73%</td>
</tr>
</tbody>
</table>

Best-in-class communities also reported a higher return on investment (ROI) than the overall sample – although the sample size was too small to be statistically significant.

What should you take away from this? While quantity of engagement does play a role in community success – pure activity metrics alone do not capture the overall value of community.

Therefore, the data suggest community managers should:

**FOCUS EARLY ON THE BEHAVIORS YOU SEE AS MOST IMPORTANT.**
While there are times in the life cycle of a community that you want to prioritize activity, it should be thought of as an interim goal to inspire and reward the types of engagement that generate strategic value.

**LOOK FOR WAYS TO DEEPEN MEMBER ENGAGEMENT, NOT JUST BROADEN IT.**
A member is a member is a member – whether they contribute once or a hundred times to your community. But which would you rather have? Find ways to capture and keep the interest of your highest-value members, whether that value is from their contributions (as advocates) or their visibility (as executive leaders). Advocacy programs, strong member programming and programs to target new members all seem to drive higher-value engagement, and are worth a focus.

**EDUCATE STAKEHOLDERS ON THE DIFERENCES BETWEEN VANITY AND VALUE METRICS.**
Reach and scale are numbers that can resonate with stakeholders, but they aren’t ultimately where value is derived. Helping stakeholders understand how community value is generated and what engagement behaviors support your goals can help turn skeptics into supporters.
OPERATIONS: Lasting behavior change requires more than transactional investments.

One consistent finding in The State of Community Management over the past few years has been a “bubble” of communities in Stage 2. While just over 10 percent of communities each year score in Stage 1 of the Community Maturity Model, about 60 percent are working their way through Stage 2, and only a small number move into Stage 3 or 4 each year.

Moving up the hierarchy of stages in the Community Maturity Model requires different approaches at different times – and has varying levels of difficulty. Moving from Stage 1 to Stage 2, in many ways, is driven by a willingness to invest in the critical elements of community – drafting a strategy, hiring staff, installing a platform, developing metrics, etc. All of these are critical building blocks for communities. But they have something else in common – they are largely achievable as projects, not long-term commitments. You can imagine them on a checklist. Did that... did that... did that.

Communities in Stage 3 make ongoing commitments to enable community success. It’s not just buying a platform – it’s integrating it with business systems and workflows. It’s not just hiring staff, it’s building a system to engage advocates, educate stakeholders, and develop governance structures. It’s bringing a strategy document to life by defining shared value, building roadmaps and committing resources to create the day-in, day-out content and programs to inspire, trigger and reward the engagement defined in the strategy.

It’s a larger commitment and one for which it is often hard to secure executive support because it is not seen as ‘scalable.’ It is driven by hard work of cultivating relationships and defining and encouraging desired behaviors - which are critical but difficult to ‘see’ progress on any given day. Nonetheless, it is only through this deeper commitment to a community approach that organizations can move forward. Those that make the commitment begin to see the long-term, sustainable impact community can provide.

Overall Maturity Scores

<table>
<thead>
<tr>
<th></th>
<th>Stage 1</th>
<th>Stage 2</th>
<th>Stage 3</th>
<th>Stage 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall</td>
<td>13%</td>
<td>59%</td>
<td>27%</td>
<td>1%</td>
</tr>
<tr>
<td>External</td>
<td>12%</td>
<td>58%</td>
<td>29%</td>
<td>1%</td>
</tr>
<tr>
<td>Internal</td>
<td>15%</td>
<td>61%</td>
<td>23%</td>
<td>1%</td>
</tr>
</tbody>
</table>

SOCM 2017 Scorecard
Therefore, the data suggest community managers should:

**SECURE A DEDICATED BUDGET, BASED ON AN APPROVED STRATEGY AND DEFINED SHARED VALUE.** While fewer than half of stage 2 communities have each of these three items, more than three-quarters of Stage 3 communities do, and together they set the stage for long-term success.

**ESTABLISH A FORMAL ADVOCACY PROGRAM.**
We have highlighted the power of formal advocacy programs in other editions of the SOCM, but the reality is that barely a quarter of Stage 2 communities (29%) have them. On the flip side, 62% of Stage 3 communities have them, and utilize their advocates to support their moderation, programming and member governance goals. Running advocacy programs is a lot of work – establishing them takes resources that many programs in Stage 2 don’t have. The long-term payoff, however, is undeniable.

**PUT DESIRED BEHAVIORS FRONT AND CENTER.**
Last year, we noted in our key findings that measuring what matters should be at the heart of your metrics. Stage 3 communities are nearly five times as likely to measure behaviors and outcomes than the overall sample – which means they are focusing on key member behaviors. They also recognize a critical need for consistency in operations with far higher levels of community playbook adoption, community-specific policies and governance structures, and defined processes for the establishment of new groups. By putting these frameworks for success in place, Stage 3 communities are able to set the stage for success.
TACTICS: Connecting content and programs to strategy accelerates community success.

More is not better, when it comes to community content and programs. In this year’s survey, there was no difference in the frequency of programs between average and best-in-class communities that offered community programming and the overall sample.

So if everyone is offering the same amount of community programs – why are best-in-class communities outperforming their peers? The answer is strategy. Best-in-class communities are about twice as likely to integrate their programming calendar with their community strategy, and to connect community programs with their functional group’s (or organization’s) editorial calendar. The community program works hand-in-glove with larger strategic elements, making the community a central piece of the organization.

The data suggest that community managers and program owners:

START COMMUNITY PROGRAMS IF YOU HAVE NOT DONE SO ALREADY.
Programming complements your community content, and it creates opportunities to connect members around common interests in ways content production alone fails to achieve. Programming also triggers opportunities for interaction through member-generated dialog.

MAKE PROGRAMS A PROACTIVE PART OF YOUR STRATEGIC PLAN.
While responsiveness to short-term member needs is important, have a program plan in place that connects with your community strategy and annual roadmap. Content and programs need to reflect the shared value of community, and a program plan tied more closely to strategy can generate the engagement behavior that is most valuable for the community. Without a strategic anchor, it’s easy to fall into the trap of creating programming for the most recent squeaky wheels that may not provide value to other members.

THINK OF COMMUNITIES AS EDITORIAL OPPORTUNITIES.
Integrating community programs with editorial calendars does numerous things. It leverages the organizational editorial processes to enhance the community’s stature in the organization or market. It ensures better connectivity between organizational content and learning opportunities. And it creates opportunities to leverage the power of community discussions and program elements for your larger organizational content needs. Editorial elements can drive traffic to community programs, and great program insights can be repurposed into new elements with real value that highlight member or user voice.
Where Does Community Stand in 2017?

The community market is no longer nascent. Innovators and early adopters have had communities for many years. We have entered mainstream adoption - both of customer communities and of internal employee communities. Getting to this point has taken the work of hundreds of organizations and thousands of people, and we have only gotten here because communities have great stories to tell. It is awesome to see and it’s something to celebrate.

Success, however, is not without its challenges and in the community space we have plenty.

SHIFTING PROGRAM EXPECTATIONS

Executives increasingly see the need and opportunity that communities provide - but that doesn’t necessarily mean they understand the dynamics of communities and how they deliver value. The need for concise and easy-to-absorb executive education is growing – and it is driving our interest in providing research and services around ROI, dashboards and training.

Community professionals need to focus on translating “community speak” to the larger organization, as well. Early community adopters often had the advantage of stakeholders on the executive team drawn to community approaches. This new round of executives is likely to be less knowledgeable or more risk-averse, and will need help understanding basics of community that we often take for granted.

SHIFTING COMMUNITY MANAGEMENT NEEDS

As the community market matures, organizations need to integrate communities into core functions and workflows as well as report their progress in financial terms. The need for community professionals with strong business and program management skills is growing. The availability of candidates with both strong business and community management skills is not growing as quickly, in part because those are both complex skill sets to develop. Organizations, however, are still looking to find those unicorns who can do it all and they are mostly coming up short. On the other side, many community professionals with years of community management experience are not getting opportunities because they lack business skills.

Savvy organizations will recognize that the best way to move forward is to apply people with business skills in the organization to the community effort. This can close the skills gap, and it is another way to connect the community approach into the larger organization. But until organizations accept that they will need to hire and manage for multiple roles and skills, this frustration is likely to continue.

SHIFTING VENDOR MARKETPLACE

We have seen a reduction in organizations that are buying technology ahead of developing a community approach. However, in too many cases, we still see technology driving community-related decisionmaking, rather than supporting it. There are more organizations than ever adopting social networking or community technology, but generally with less entrepreneurial zeal and understanding than the early adopters. Because the size of the market has grown, there are also more vendors jumping into the fray. Together that has created more, not less, confusion. In the absence of good information, organizations risk treating community as a ‘feature’ of a larger bigger technology platform instead of a management construct enabled by sophisticated technology. They also run the risk of surrendering control over their community strategy to technology partners who may not have their specific community goals at heart.

We see in our research and in our work that the leading community programs are growing - in value, activity, community management resources and impact on their organizations. The great news for everyone else is that the lessons in how to build high value community programs is out there, if the organization is willing to learn.

Rachel Happe
Reflection on Past Key Findings

One of the challenges of an “annual report” is an implication that older reports must be somehow out-of-date. While we all want the latest data, the new data often simply reinforces the findings from past years. In some cases, too, reformulating questions or expanding the survey sample can actually help reinforce an original finding or give it new context.

In our work, we often find ourselves referring people back to past SOCM report, in particular the 2011 and 2012 State of Community Management reports, which provide qualitative examples of best practices across the competencies (2011) and examples of the 4 stages (2012) of the Community Maturity Model.

With that in mind, we thought 2017 was a good time to look back at the past three years to check on how our findings have held up, with new data from our 2017 survey.

**SOCM 2014 KEY FINDINGS:**

**COMMUNITY MATURITY DELIVERS BUSINESS VALUE.**

In 2014, we noted that more mature communities were more likely to measure value, have approved strategies and resourced roadmaps. That’s all still true, and today we can add that community managers report increasing value generated by communities, and that our initial ROI results are very promising, with communities delivering 10x-20x value or more.

**ADVOCACY PROGRAMS INCREASE ENGAGEMENT.**

The 2014 report found that those with formal advocacy programs had better engagement overall than those without them. While the gap has narrowed in this year’s survey, those with formal advocacy programs in place see a bump in engagement, and those with the most robust advocacy programs see the greatest engagement – 35% of members actively engaged per month, versus 26% for those without advocacy programs.

**EXECUTIVE PARTICIPATION IMPACTS SUCCESS.**

The SOCM 2014 found communities with executive participation had greater resources, and that best-in-class communities had higher executive involvement.

Both of those elements are still true in 2017. In addition, we have noted the positive impact of lower-level leadership, such as directors and subject matter experts, on engagement and community value. Today, we also know that support for the community effort by executives, even if they are not involved on a regular basis, moves the needle as well.
SOCM 2015 KEY FINDINGS:

STRATEGY: INVEST IN PEOPLE AND SYSTEMS, NOT JUST PLATFORMS.

The message in SOCM 2015 was that adequate staffing, professional development and incentives for engagement made for stronger communities. Those statements are all still true. Remarkably, too, staffing and professional development have become near-universal. Ninety-six percent of communities in the survey had at least part-time community management, and of those, 96 percent said they provided professional development such as coaching, courses and membership in networks for community managers like TheCR Network.

Also notable, our 2017 research participants spent a higher percentage of their cash on community management salaries and resources than they did on platforms.

OPERATIONS: ADVOCACY PROGRAMS ARE MORE THAN A CHECKBOX.

This SOCM 2015 finding built on 2014 to note that multi-tiered advocacy programs with real benefits and feedback mechanisms for advocates were the hallmark of successful communities. We see that again in 2017, where best-in-class communities were three times as likely to offer multi-tiered advocacy programs as the overall sample.

Communities with the most robust advocacy programs, not surprisingly, also score highly in a number of other member empowerment areas. They’re more likely to have members lead programming, have systems for formal member feedback, and have members engaged in strategic planning.
TACTICS: QUICK WINS EXIST TO IMPROVE ENGAGEMENT.

The SOCM 2015 noted the correlations between defining value, creating new member programs and providing community management training and community maturity.

In 2017, those relatively “easy” opportunities are still there – and we could add others, such as tapping members and internal experts to provide moderation and programming help. 2017 also brought a follow-up question on new member programs. Communities that formally followed up with new members, either after a set period of time or after their first contribution, reported markedly higher engagement than those who only provided initial training.

SOCM 2016 KEY FINDINGS:

STRATEGY: DEFINING SHARED VALUE DRIVES SUCCESS.

In 2016, we asked not only whether respondents could define the member and organizational value of their community, but whether they could define the shared value on which the community was based. In 2016 and 2017, those who say they can define shared value score substantially better than those who cannot. And if you can measure that value? Even better.

OPERATIONS: EMPOWERING MEMBERS ACCELERATES ENGAGEMENT.

The 2016 report found communities with formal feedback systems, member-involved strategy development and organizational support for community outperformed their peers. All true again this year. The more you can get members involved in creating the fabric of the community, the more they will knit themselves into it – and the more they will bring in their peers from elsewhere into the community.
TACTICS: MEASURE WHAT YOU WANT TO SEE, NOT WHAT YOU HAVE.

Ultimately, communities are about changing behavior, and simply measuring activity doesn’t get at that behavior change. Our best-in-class communities get this – they are three times as likely to measure behaviors and outcomes, in addition to activities.

In the 2016 report, we highlighted that this might force customers to lean on community vendors to make new and better analytics available – and our results this year, particularly around ROI, underscore the need for new and innovative ways to measure search and other elements that are critical to community success, but aren’t captured by traditional web analytics.

Percent Tracking Behaviors and Outcomes Related to Community Strategy (2017)

![Percentage Tracking Behaviors and Outcomes](image)

Overall: 21%
Best-in-Class: 65%

ACCESSING PAST STATE OF COMMUNITY MANAGEMENT REPORTS:

All of the annual State of Community Management reports can be found on The Community Roundtable website at [www.communityroundtable.com/socm](http://www.communityroundtable.com/socm).
Methodology and Demographics

The data published in this report were collected from 331 community programs over 8 weeks in January, February and March 2017. Participating communities represented internal and external use cases and a wide range of industries, and they ranged in age from pre-launch to a handful that were more than 20 years old.

As they have for all our recent reports, members of TheCR Network helped shape the research survey and approach. Each year, a working group of members helps us define the research scope, identifies opportunities to dig more deeply, provides feedback on the research instrument and then helps us prioritize the data that are most valuable to practitioners. This has allowed us to continually improve the scope and depth of the research.
This year, we tweaked the way that we asked about community use cases. In the past, we asked respondents to say whether their community program was internal, external or had elements of both, and then let them pick as many specific use cases as appropriate from a selection of list.

This year, we asked respondents to pick a single primary use case (or two use cases for programs that identified as both internal and external.) We then followed up with questions about secondary use cases.

Similarly, we asked respondents this year to select their primary community platform, rather than all community platforms they used. Many communities use multiple platforms – including The Community Roundtable, which uses Higher Logic, Slack and Facebook Groups to interact with our members – and we wanted to make sure we connected data with the primary platform that drives the community program. As a result, the percentages for some platforms changed substantially, but the data can now be applied more directly to the vendors providing the backbone of the community, without being clouded by cases where a platform plays only a secondary or adjunct role.

**Ten Most Cited Primary Community Platforms**

- **IBM Connections** 2%
- **Drupal** 2%
- **Sharepoint** 3%
- **Yammer** 3%
- **Salesforce** 4%
- **Custom** 5%
- **Facebook Groups** 6%
- **Higher Logic** 8%
- **Lithium** 9%
- **Jive** 26%
- **Other** 32%

*Established platforms continue to lead among survey respondents in 2017. New platforms such as Slack and Workplace by Facebook have not been widely adopted as community hubs, although Slack and other platforms were among those most frequently listed as secondary platforms.*
Community Maturity Overall

The State of Community Management research uses survey responses to place communities in one of four stages in each competency of the Community Maturity Model. Overall, we have seen a slight but steady three-year trend of score improvements on the survey. However, it is difficult to know if this is because of improvements, or changes in the scoring methodology. For 2017, more than 70% of communities ranked in Stage 1 or Stage 2. Almost all of the rest scored in Stage 3, with just one percent reaching Stage 4.

Throughout this research, we report data using two types of comparison groups within segments:

- Communities on Stage 1, 2 and 3/4 of the Community Maturity Model. (The survey population does not include enough Stage 4 communities to report them separately.)

- Average and best-in-class (BIC) communities. Each year, the BIC segment is comprised of approximately the 20% most mature (highest scoring) communities overall in the survey set. When we talk about ‘best-in-class’ within a specific metric, we are not referring to the 20% highest-scoring on that element, but rather the Top 20% overall.
Where Community Resides in Organizations

One way to appreciate the impact of communities in organizations is to look at how the community and its leadership are connected into the overall structures of the sponsoring organization.

There’s no one place where community should be “seated” within the organization, a point that is driven home when you look at the myriad departments with responsibility for community that were cited by respondents.

But if community is to be a strategic part of the organization, it needs to be situated at a level within the organization that reflects that importance. We looked at where communities fit in organizations by examining three items: who approved community budgets, and the title and reporting level of the head of the community program. In all three cases, we see signs of the high relevance of community in organizations.

In our 2017 sample, 70% of communities with dedicated budgets say their budgets are being approved at the VP level or higher.

Looking at the roles of community leaders – we find that only a small minority of community department heads hold Vice President-level titles, but more than a third are titled as Directors or higher, and well over half report to Vice Presidents or higher levels of the organization.

Taken together, these data suggest that communities, once seen as islands within organizations, are getting a more strategic seat at the table.

Who Runs Community – and What Level Do They Report to?

**Head of Community Program’s Title**
- Manager: 41%
- Director: 26%
- VP or C-Level: 12%
- Other: 21%

**Program Head Reports to:**
- Director: 26%
- VP or C-Level: 31%
- Senior VP: 10%
- C-level: 7%
- Other: 7%
Strategy

Start with strategy, and keep it front and center.

The State of Community Management research has repeatedly reinforced a few key tenets of community in its eight-year history. Perhaps foremost among them is that few if any communities are likely to succeed without developing a robust community strategy as early as possible in their lifecycles.

A good strategy is your guiding force. It defines the purpose and value of the community for members and the sponsoring organization. It describes the behavior changes that you as a community leader want to encourage, and why those behaviors have value. It defines your target members, and captures how the community fits into their larger world. Ideally, it also is connected to a roadmap that illustrates how your community will move forward in the coming years, and identifies the resources needed for that growth.

The percentage of communities that have embraced the need for community strategy has risen dramatically in the past eight years. Stage 3 and 4 communities almost universally have approved strategies – and most have the shared value statements and resourced roadmaps to go with them.

Maturity Markers by Stage: Strategy

But there is still room for improvement. The percentage of communities that have defined what the value of the community is for members and the organization is effectively unchanged over the past year, and the percentage of communities with resourced roadmaps has remained flat for the three years we have asked about them. Approving a strategy can take months of work and countless hours of meetings – but it is critical. However, that investment can go to waste if you fail to provide the resources to enable community success.

The research suggests:

- Defining the value of the community for the organization, community members, and the value they have in common is critical for future success.
- Communities with dedicated budgets often move ahead more quickly than those without them.
- For those communities with approved strategies, developing a roadmap gives you a concrete plan to move ahead.

Does Wisdom Come with Age?

In community strategy, not exactly. The data show that older (10+ year-old) communities are only slightly more likely to have approved strategies, defined value, and resourced roadmaps than even the youngest communities. Don’t wait on your strategy efforts – not only will they propel your community forward, they may not be something you ever really get to revisit.
Measuring Value

Best-in-class communities almost universally have defined the value of the community for members and the sponsoring organization, and are twice as likely to have defined the shared value of the community – a powerful base on which to build strong communities.

Percent of Communities with Dedicated Budgets

Best-in-class communities are far more likely to have a dedicated budget, giving program owners more control over resource allocation and strategic budgeting.

Budget Allocation By Community Type

For the first time in 2017, community programs spent equal amounts on community management and community platform resources in most use cases.

Do Dedicated Budgets Matter?

Communities with dedicated budgets are far more likely to have approved strategies and roadmaps and have defined shared value for the community.

Roadmap Status

Best-in-class communities are more than twice as likely to have approved and resourced roadmaps – giving them a pathway to enable their community strategies to succeed.
Leadership

Leadership engagement can be a powerful catalyst for communities.

When people talk about organizational leaders, they are almost always referring to executive leaders — those whose titles put them at the top of the organizational chart. But in communities, there’s also a second group of leaders. They’re your advocates, those who play key active roles in the community, regardless of title. The best communities leverage both these informal leaders and formally-titled leadership to engage community.

There’s no question that community-oriented executives are a plus, but how critical are executives to community success? Ultimately, it depends on the community goals. In a technical community, for example, it’s likely that subject matter experts might have greater day-to-day value than C-level executives because they can answer questions from other members. However, making sure that executives across the organization understand and support the community use case — whether or not they are regular visitors — sets a critical tone.

Setting reasonable expectations for executives is also important. Just as we don’t expect members to go from zero-to-hero in contributions immediately, we shouldn’t expect CEOs to go from community skeptic or neophyte to inspirational force overnight. Be realistic. Understanding the time, comfort and technical barriers to their engagement is critical.

As for advocates — year after year our research reinforces the great opportunity robust advocacy programs can provide. Advocates can answer questions, create programs, and provide valuable feedback. But the best advocacy programs understand the needs and limitations of each group of advocates in a community, and ensure advocates receive rewards that match or exceed the effort they contribute.

The research suggests:

- Getting leaders involved shows community support — and getting leaders with subject matter expertise involved can make day-to-day engagement stronger
- Multi-tiered advocacy programs can be very powerful. To be successful, give advocates benefits worthy of their time
- Struggling with executive engagement? Try asking executives directly about it, and build plans to address their issues.

Maturity Markers by Stage: Leadership

<table>
<thead>
<tr>
<th>Maturity Markers by Stage: Leadership</th>
<th>Stage 1</th>
<th>Stage 2</th>
<th>Stage 3/4</th>
</tr>
</thead>
<tbody>
<tr>
<td>% with Formal Leadership/Advocacy Program</td>
<td>9%</td>
<td>29%</td>
<td>62%</td>
</tr>
<tr>
<td>% with Any Type of Advocacy Program</td>
<td>43%</td>
<td>72%</td>
<td></td>
</tr>
<tr>
<td>% with Support of Senior Exec for Community</td>
<td>37%</td>
<td>52%</td>
<td>72%</td>
</tr>
<tr>
<td>% with Subject Matter Expert Participation</td>
<td>48%</td>
<td>55%</td>
<td>66%</td>
</tr>
<tr>
<td>% with Executives who Participate Regularly</td>
<td>22%</td>
<td>37%</td>
<td>48%</td>
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Savvy community owners are seeing the opportunity to share responsibilities and benefits of leadership with their community advocates. Advocates are tasked with a number of day-to-day community responsibilities and opportunities to test new elements. And they're rewarded with recognition, connection to community managers and other advocates, and access others in the community don’t get.

Executives in best-in-class communities are more likely to respond to or create content than executives overall, but the differences are not as significant as you might expect.

Best-in-class communities are twice as likely to have formal advocacy programs, and three times as likely to have multi-tiered programs for advocates.

Best-in-class communities get slightly more leadership participation than average. So why don’t execs take part? Time is a greater constraint than a lack of interest or inability to see the value.

Communities thrive in supportive environments, and best-in-class communities are far more likely to have supportive executives than the overall cohort.
Culture

The conversation shifts from quantity of engagement to quality of interactions.

In culture, this year’s biggest finding was already noted in our Key Findings. Our best-in-class communities did not demonstrate higher percentages of engaged members than the overall sample. But they did show a deeper quality of engagement on a number of measures, including member generated content, and reported greater growth in answered questions and generated value than the overall sample. (Read more and see the related charts on page 10.)

While the engagement profile data has shifted over time, other data in our culture competency has remained solidly consistent. First, active engagement in communities is still far broader than the 90-9-1 rule of social media engagement often applied to communities. Respondents said on average that 30 percent of their members were actively posting or responding to posts in the previous month. Also, we consistently have seen our best-in-class communities shifting their metrics focus from breadth of activity to depth of behavior change and the resulting outcomes. This shift is both necessary and welcome in an era where community owners are expected to demonstrate the value of community. That value is driven not by activity alone but by how those activities drive new behaviors that touch on cost, quality and time.

We also note again this year that communities are unlikely to succeed in isolation from the larger organization. In community as elsewhere in business, organizational culture can undermine the best efforts of any person or group. Community managers who fail to consistently work to raise the profile of the community in the larger organization – or try to operate in a “safe zone” outside of the surrounding culture - are likely to run into problems. Building organizational support is necessary for the long-term success of almost any community.

The research suggests:

- As your community matures, shift your focus from activity to behaviors.
- Encourage consideration of community engagement in evaluations – people will act on what they know is being measured.
- Time spent rallying organizational support for the community effort is time well spent.

Does speed matter?

Best-in-class communities respond to a higher percentage of posts in the community, but they aren’t necessarily faster. About the same percentage of average and best-in-class communities have a time to response of 12 hours or less. Use case did not make a substantial difference, either, but smaller communities typically responded a bit faster.
For the first time, the engagement profiles of overall and best-in-class communities were nearly identical. Communities without registration posted similar engagement. Internal communities, as expected, had higher engagement than external, and small communities of less than 1,000 members had higher engagement than large ones.

**Engagement level definitions:**

**Inactive:** Members who have a profile in the community but who are inactive, which typically means they have not accessed the community in the past month.

**Listeners:** Members who only view content.

**Contributors:** Members who have commented on a blog, discussion thread, document or other item but don’t start discussions. They may also bookmark, rate, share or tag content, update their status or participate in events.

**Creators:** Members who have started a discussion, a chat or a blog post or participated in community leadership activities including content moderation, welcoming members or initiating programming.

**Collaborators:** Members who collaborate (i.e. create value together - this could be training materials, code/apps, events, product specs, marketing materials, etc) as well as create content independently.

**Community Manager Satisfaction**

Best-in-class communities have higher levels of satisfaction among their community managers than the overall cohort. More than 90% of best-in-class respondents are satisfied with their community culture.
Member Feedback Process?

Feedback systems play a role in improving communities, and have become nearly universal in community programs. Best-in-class communities have a higher percentage of formal feedback programs.

Does your community require member registration?

Overall

<table>
<thead>
<tr>
<th>Yes</th>
<th>To post/comment</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>51%</td>
<td>29%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Is community engagement part of performance reviews?

Overall

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>Not Sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>20%</td>
<td>66%</td>
<td>14%</td>
</tr>
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</table>

Making engagement in the community part of performance reviews sends a message that the organization values the community.

Balance Between Formal and User-Generated Content

Best-in-class communities see a higher percentage of user content, and a higher percentage of posts get comments and replies compared with the overall sample.

My organizational culture _____ a community approach.

Organizational culture plays a sometimes unappreciated role in community success. 90 percent of best-in-class communities benefit from a supportive organizational culture.

Percentage of Posts that Receive Comments/Replies

Best-in-class communities see a higher percentage of user content, and a higher percentage of posts get comments and replies compared with the overall sample.
To take your community where it needs to go, you need to understand where you are.

Building a successful community is a journey, but without the right information to know where you are in that process, it’s hard to make smart decisions.

TheCR’s Community Performance Benchmark is a trusted third-party analysis of your community management strengths and weaknesses, using our Community Maturity Model as a guide.

The Community Performance Benchmark provides concrete and actionable guidance that helps translate your strategic ambition into strategic reality—and make decisions with confidence.

“The great thing about the CPB was how easy it was for the data to be clearly deciphered by any level of the organization, allowing executives to demonstrate the success of our community with the leadership team!”

Courtney Zentz, Senior Manager, Collaboration & Solution Center for Ricoh

Get started with your own Community Performance Benchmark. Contact us for more information: info@communityroundtable.com

THE COMMUNITY ROUNDTABLE
Community Management

Distributed responsibilities empower managers to focus on strategy.

Back in 2010, when we started this report, community management was an amorphous role. Seven years later, the idea of having a full-time community manager to help trigger success is almost universally accepted, and the concept of a successful unmanaged organic community is limited to a relatively small number of specific cases. That is not to say communities cannot succeed without a community manager – but that in most use cases, it’s highly unlikely.

What’s also become clear is that community managers need to share leadership. Our best-in-class communities are far more effective at tapping into and supporting member involvement in strategy, programming and other areas. In larger communities, we continue to see the power of building community teams that both strengthen moderation and other hands-on elements, and free up community team leaders to escape the day-to-day and think strategically. In mature communities the focus of community management shifts from direct engagement to enabling the engagement of others. Community managers who are able to make that shift empower and engage key members and protect themselves from burnout.

Another notable trend we see is increased investment in professional development for community managers. The growth of community management as a profession means there are more opportunities out there – and savvy organizations are investing in conferences, memberships and training for their community professionals. Considering the prevalence of “platform over people” approaches of many organizations five years ago – it’s an investment shift worth highlighting.

The research suggests:

- Full-time community managers are leading more and more communities – demonstrating the value of community management.
- Best-in-class communities empower key members, giving them rewards while scaling their resources and gaining insights.
- Collaboration with other departments scales management effectiveness.

Where & how CMs spend their time?

Once again this year, there were only tiny differences in where and how community managers spent their time between overall and best-in-class communities. Best-in-class community managers spent slightly more time on strategy and engagement, and less on technical elements. They also spent more time engaging in their platform, rather than in other communications mediums.
**Do You Have Full-time Community Staffing?**

- Overall: 73% Have Full-time Community Team
- Best-in-Class: 93% Have Full-time Community Team

*Best-in-class communities are more likely to have full-time managers, and twice as likely to invest in a community team to support day-to-day and strategic needs.*

---

**Do members contribute to strategic planning?**

- Overall:
  - No: 45%
  - Informally: 37%
  - Formally: 18%

- Best-in-Class:
  - No: 47%
  - Informally: 38%
  - Formally: 29%

*Best-in-class communities tap into the knowledge of their members, having them contribute as moderators and strategic planners.*

---

**Do members serve as moderators in your community?**

- Overall:
  - No: 35%
  - Yes: 65%

- Best-in-Class:
  - No: 37%
  - Yes: 63%

---

**What professional development opportunities do you offer your community team?**

- Conferences: 78%
- Member network: 78%
- Coaching: 78%
- Online courses: 78%
- Degree program: 6%
- Other: 78%

*Best-in-class communities support their team with professional development.*

---

**What groups in your organization collaborate with the community team?**

- Marketing: 76%
- Customer support: 71%
- Product/Engineering: 67%
- IT: 63%
- Internal Comms: 62%
- PR/External Comms: 56%
- Strategy: 52%
- Legal: 48%
- Sales: 41%
- HR: 35%
- Finance: 27%

*Collaborating within the organization ensures that more members and stakeholders understand the role and power of the community.*
Content and Programs

Strategic alignment gives content and programs relevance.

Content and programs are often seen as one collective entity, but they serve two different roles for communities. Content connects people into the community, while programs create opportunities for members to connect with each other. Both have value – and both are needed.

But as we learned in this year’s survey – many communities fail to embrace one or the other, and many others fail to connect their content and programs to their community strategy effectively.

The good news for community owners trying to improve their content and programs is that they don’t necessarily have to do more. Our best-in-class communities run programs about as often, and even offer a very similar program mix as the overall sample. However, best-in-class communities tap into a broader range of members and others to lead programs than the overall sample, using members and internal experts far more often than the overall sample.

Best-in-class communities are also more likely to offer programs specifically targeting new community members (73% vs. 50% overall). But even best-in-class communities miss out on a critical follow-up. More than a third of communities with new member programs never follow up with those members, and of those who do, most do informally. The research data show that a formal follow-up process correlates with sharply higher levels of engagement. The data set is small, but the rationale makes sense. If you connect with new members after they have had a chance to settle in or post content, you may be able to help them more effectively adopt desired behaviors than they would if left to their own devices.

The research suggests:

- Taking a strategic approach to content and programs pays off in engagement and value.
- New member programs are critical – but don’t forget to follow up!
- Using experts and members as program leaders brings expertise and connections.

New Member Programs

Three types of new member programs grow quickly in prevalence as communities move from Stage 1 to Stage 3. Stage 3 communities are more than twice as likely as Stage 1 communities to offer automated welcome e-mails. They’re also far more likely to offer getting started guides and welcome threads to give new members a place to get started in the community.
**What best describes your community's approach to content?**

- Overall: 24% No approach, 34% Aligned with strategy, 23% Aligned with strategy and integrated with editorial
- Best-in-Class: 8% No approach, 16% Aligned with strategy, 33% Aligned with strategy and integrated with editorial

**Who leads scheduled community programs?**

- Overall: 42% Community Managers, 21% Internal Experts, 25% Members, 12% Informally
- Best-in-Class: 16% Community Managers, 16% Internal Experts, 40% Members, 29% Informally

Best-in-class communities are almost twice as likely to align content and programs with the community strategy.

**What best describes program planning in your community?**

- Community Managers: 85% Program calendar reflects strategy, 89% Program calendar reflects strategy, integrated with editorial
- Internal Experts: 41% Program calendar reflects strategy, 62% Program calendar reflects strategy, integrated with editorial
- Members: 31% Program calendar reflects strategy, 43% Program calendar reflects strategy, integrated with editorial
- Moderators: 19% Program calendar reflects strategy, 25% Program calendar reflects strategy, integrated with editorial
- Vendors / Partners: 14% Program calendar reflects strategy, 21% Program calendar reflects strategy, integrated with editorial
- Outside Experts: 14% Program calendar reflects strategy, 15% Program calendar reflects strategy, integrated with editorial

Best-in-class communities scale their community management resources and strengthen programs by tapping members and internal experts, in particular, to lead scheduled events.

**Do you offer content and programs targeted specifically at new members?**

- Overall: 50% no approach, 7% informal, 35% after a set time
- Best-in-Class: 16% no approach, 7% informal, 33% after a set time

Best-in-class communities are more likely to have specific programs for new members. But all communities miss the chance to follow up with new members to reinforce their engagement.

**Most Common Programs**

- Newsletters: 75% Overall, 68% Best-in-Class
- Online Webcasts: 69% Overall, 66% Best-in-Class
- Spotlights: 62% Overall, 57% Best-in-Class
- In-person events: 47% Overall, 44% Best-in-Class
- Working Groups: 47% Overall, 44% Best-in-Class
- Online Workshops: 51% Overall, 49% Best-in-Class
- AMAs: 43% Overall, 34% Best-in-Class
- In-person workshops: 40% Overall, 32% Best-in-Class
- Audio: 37% Overall, 42% Best-in-Class
- Q of the Day: 30% Overall, 24% Best-in-Class
- Online Chats: 30% Overall, 24% Best-in-Class
- Work Out Loud: 14% Overall, 11% Best-in-Class

Best-in-class communities actually offer slightly less variety in programming than the overall sample, suggesting their success is based on quality, rather than the quantity of offerings. (left and above)
Policies and Governance

Established structures provide a base for member success.

Policies and governance may have been the area of the State of Community Management survey that we spent the most time revising in 2017. In addition to splitting questions about policies and guidelines, we also added questions about governance, policies for new groups in the community and more.

As expected, we found that best-in-class communities were more likely to have specific policies covering community conduct and were nearly universal in having guidelines that defined both desired and unacceptable behaviors.

We also explored how much structure communities set up around standard operating procedures for moderators and the community team, as well. We found again this year that best-in-class communities were about twice as likely (67% to 34%) to have community playbooks governing objectives, governance, metrics and other elements of community management. They were also more likely to have processes for the establishment of new communities (75% to 48%), regular community audits (81% to 44%), approved crisis plans (56% to 29%), and more robustly defined governance structures for the community (64% to 36%).

For communities to succeed, they need to set expectations for member conduct, but they also need to provide a reasonable expectation of what members can receive. We’ve said before that policies and guidelines provide a trellis for member growth – these other governance elements give strength to that framework and provide the base that makes it possible for the community management team to support member engagement consistently and maintain desired behaviors.

The research suggests:

- Good policies and guidelines help members understand the ground rules of community involvement.
- Good structures create a base for member success by empowering community leaders to be consistent and effective caretakers.
- Best-in-class communities establish standard procedures for new groups, and review current ones to keep the community vibrant and manageable.

Setting guidelines for new groups

Whether to set guidelines for new groups can be controversial in some communities. The research suggests that communities which have approval requirements for new groups have higher levels of user generated content than those that don’t.
Social media policy applies to community

Do you have specific policies governing behavior in your community?

- Overall: 50% Specific community policy, 33% No policies, 17% Social media policy applies to community
- Best-in-Class: 71% Specific community policy, 29% No policies

Best-in-class communities are more likely to develop policies and guidelines specifically for the community, and use them to define encouraged (as well as unacceptable) behaviors.

What triggers an update of your community policies and/or guidelines?

- Overall: 32% Other/not applicable, 24% Scheduled review, 11% Audit, 33% Unplanned event
- Best-in-Class: 59% Other/not applicable, 27% Scheduled review, 12% Audit

Interestingly, the data show no difference between average and best-in-class communities in triggers or scheduling for policy and guidelines updates. Updates are most often triggered by unplanned events, and when they are reviewed, it’s typically on an annual basis.

How often do you review policies and guidelines?

- Overall: 27% No schedule/other, 59% Monthly, 12% Quarterly
- Best-in-Class: 5% No schedule/other, 71% Monthly, 2% Quarterly

Does your community have...?

- A defined process for approving new groups? 66% Best-in-Class, 48% Overall
- A defined community governance structure? 64% Best-in-Class, 36% Overall
- An approved crisis plan? 56% Best-in-Class, 29% Overall
- A community playbook? 67% Best-in-Class, 34% Overall
- Regular community audits? 81% Best-in-Class, 44% Overall

Best-in-class communities have developed more robust structures and plans to ensure consistent responses to community events. They use playbooks, audits and crisis plans to prepare for common and extraordinary events.

Top 5 Playbook Elements:

- Community objectives: 84% Best-in-Class, 71% Overall
- Participation guidelines: 71% Best-in-Class, 65% Overall
- Content: 64% Best-in-Class, 62% Overall
- Metrics: 64% Best-in-Class, 62% Overall
- Navigation instruction: 58% Best-in-Class, 56% Overall

Top 5 Community Audit Areas:

- Content: 74% Best-in-Class, 72% Overall
- Members: 72% Best-in-Class, 68% Overall
- Groups: 58% Best-in-Class, 56% Overall
- Permissions: 46% Best-in-Class, 46% Overall
- Tools/functionality: 46% Best-in-Class, 46% Overall
Tools

**Sophistication has yet to translate into community manager satisfaction.**

The State of Community Management is designed to be a platform-agnostic survey. We don’t compare platforms, and instead try to get at the features community managers most value when looking at platforms. However, because so many of our members and clients are evaluating or re-evaluating their infrastructure, this year we explored how satisfied community leaders were with their platforms.

The answers were, not surprisingly, mixed. Only about 19% of survey respondents rated their platform as a 9 or 10, the typical level for endorser in NPS calculations. At the same time, 24% gave their platform a 5 or lower satisfaction score. But low satisfaction doesn’t necessarily mean change is coming – 70 percent of respondents put down a 5 or less when asked, on a scale of 1 to 10, whether they were likely to change platforms.

The research suggests:

- Tools are becoming more sophisticated and integrated, but most fall short at providing CM customer satisfaction.
- Despite that dissatisfaction, tool turnover is slow – likely limited by complexity and cost.
- Access and ability to make technical updates helps community managers move communities forward.

**Mobile use and satisfaction**

External communities have about twice as many members regularly accessing their communities via mobile, but respondents are much happier with their mobile platforms. Just 14% of external respondents gave their mobile platform a 9 or 10 rating, while 36% gave it a score of 0-5. Internal communities fared even worse – just 7% gave their platforms a 9 or 10, while 45% scored them 0-5.
What best describes your community platform?

<table>
<thead>
<tr>
<th>Overall</th>
<th>9%</th>
<th>37%</th>
<th>22%</th>
<th>13%</th>
<th>19%</th>
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<tbody>
<tr>
<td>Best-in-Class</td>
<td>6%</td>
<td>14%</td>
<td>16%</td>
<td>13%</td>
<td>51%</td>
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</table>

- No primary platform
- A dedicated space not integrated with other systems
- A dedicated space integrated with other channels members use regularly
- A dedicated space integrated with business systems
- A dedicated space integrated with both member channels and business systems

Best-in-class communities are far more likely to invest in integrating the community platform with other business systems and member channels to create more seamless experiences.

What integrations does your platform support?

<table>
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<tr>
<th>Integration</th>
<th>Overall</th>
<th>36%</th>
<th>34%</th>
<th>23%</th>
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Best-in-class communities are far more likely to have platforms that integrate with other systems, like SSO, CRM, and content management.

What percentage of your members regularly access the community via mobile?

- 61 to 100: 18%
- 41 to 60: 18%
- 0 to 40: 64%

Communities have a mobile opportunity – more than a third have greater than 40% of members using mobile access, but only 1-in-9 gives their mobile platform high marks.

How would you rate your platform’s mobile experience?

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<tr>
<th>Rating</th>
<th>Overall</th>
<th>Best-in-Class</th>
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<td>20%</td>
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<td>3-5</td>
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How long have you been on your current platform?

- 5 years or more: 25%
- Less than 1 year: 18%
- 3-4 years: 28%
- 1-2 years: 29%

On a scale of 1-10, how satisfied are you with your current platform?

- 5%: 0-2
- 19%: 3-5
- 55%: 6-8
- 19%: 9-10
- 2%: Don’t know/Not applicable

What are the top administrative features/tools essential for effective community management?

- Built-in analytics: 47%
- Content mgmt: 45%
- CM dashboard: 43%
- Moderation: 35%
- Permissioning: 35%
- APIs: 37%
- Influencer tracking: 22%
- Gamification mgmt: 22%
- Member profiles: 16%
- Rule-based actions: 13%

Best-in-class communities are more likely to empower their community team with the skills and access to make changes to the platform, which can lead to faster responses to issues and improved designs.

Does your community team have the access and ability to make changes to your community platform?

- Access & ability: 42%
- Access, no ability: 25%
- No access: 11%

Best-in-class communities are more likely to have platforms that integrate with other systems, like SSO, CRM, and content management.
Metrics & Measurement

**Measuring behavior change isn’t easy - but it’s vital.**

Metrics are often thought of as a result, not a driver, of community success. But as it turns out, we see some of the biggest differences between best-in-class and average communities in this competency, and almost every major recommendation we make can be connected to what you measure, how you measure it, or with whom you share the results.

What should you measure? Year after year we see our best-in-class communities focus on behaviors and outcomes – answering questions, accelerating response times, and return on investment, rather than activities like logging in, posting, etc. By defining and measuring valued behaviors, best-in-class communities keep their eyes on what matters to the community, not just who is passing through it.

How you measure those key behaviors can be a challenge, because platforms often fail to easily and consistently provide the metrics that community managers need to evaluate community performance. Measuring answered questions, successful search rates, connections, and collaborative behaviors can take some creative and manual analysis, but these metrics are critical to keeping the eye on the ball.

**Maturity Markers by Stage: Metrics & Measurement**

Savvy community managers also need to work with or around their platform’s community management tools to improve those behavioral metrics.

We also looked at who receives community reports. The data back up the assertion that executive interest in communities is growing. Share your data honestly, and with the appropriate stories, caveats and explanations of how communities grow. Metrics should be part of strategic discussions – use them to engage and inform stakeholders who might otherwise not understand your needs, successes and constraints.

**The research suggests:**
- Maturing communities shift from measuring quantity of engagement to the value generated by engagement.
- Too few communities are measuring their value and ROI. In a climate where executives are interested, it’s a missed opportunity for engagement, support and influence.
- Couple metrics with stories from the community - the qualitative and quantitative data together provide the best picture of community value.

**Getting community metrics into the organization**

A majority of respondents say that community metrics are beginning to penetrate the larger organization. 63% say that community metrics are included in line of business reports in some areas. For best-in-class communities, the percentage rises to 82%.
Best-in-class communities shift from measuring quantity of activity to look more closely at the behaviors and outcomes that demonstrate the strategic effectiveness of the community.

Best-in-class communities are more likely to be able to measure community value, prepare dashboards for executive and include community metrics in line of business reports.

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All communities monitor activity, but best-in-class communities are far more likely than others to measure behaviors like answering questions and outcomes such as response and resolution times.
SOCM2017 in Summary

Stage 1    Stage 2    Stage 3    Stage 4
Strategy   Leadership  Culture  Community Management
Content & Programming  Policies & Governance  Tools  Metrics & Measurement
Overall

Overall Best-in-Class

2017 Survey Communities
KEY FINDINGS IN BRIEF:

TRENDS:

OPTIMISTIC PERCEPTIONS FORESHADOW EMERGING SUCCESS FOR COMMUNITY.
Community professionals are seeing positive changes in member activity, answered questions and value generated. Respondents were 10 times more likely to say their community is generating more value than it was a year ago than to say value had declined. Respondents also said by a 3-to-1 margin that budgets and staffing had increased in the previous 12 months.

COMMUNITIES CAN DEMONSTRATE ROI – IF THEY HAVE THE DATA.
Most communities still struggle to translate the value they are seeing into financial terms. Only about a third of communities said they could measure community value, and only 1-in-10 said they could measure ROI on their own. Of those that can, though, a majority report positive financial returns – with returns as high as 10x, 20x or more in some cases.

KEY FINDINGS:

STRATEGY: Quality of engagement matters more than quantity as communities mature.
The gap between best-in-class and average engagement profiles has shrunk, but best-in-class communities are succeeding by shifting their focus to metrics that better capture behavior change and the quality of engagement, rather than the quantity of activity.

OPERATIONS: Lasting behavior change requires more than transactional investments.
Our maturity scores once again place the majority of communities in Stage 2 overall, having made the needed one-time investments in community, such as hiring staff, buying and launching a community platform, and developing a community strategy. The next steps are more difficult – they enable long-term community success by implementing the strategy creating roadmaps, investing in developing staff and advocates, and shifting the focus to key behaviors, rather than activity. Communities able to enable their investments in these ways demonstrate higher maturity and stronger engagement.

TACTICS: Connecting content and programs to strategy accelerates community success.
Best-in-class communities don’t do more frequent content and programming than their peers. Instead, they focus on connecting their content and member programs to the overall community and/or organizational strategy. That not only helps them stay focused, it helps weave the community into the fabric of the organization.
The ROI Conundrum

Put 100 community program leaders in a room and ask them what their stakeholders most want from them – and “proof of community value” will be right at the top of the list. It’s a rare organization that just “gets it” that community is strategically important without numbers to back it up, and without the right data, it only takes one well-placed detractor to devastate your community program.

Communities need to define and measure value and then take the next step and translate that into a financial return on investment (ROI) if they expect to have continued support from executives and stakeholders. Saying we need to measure ROI and actually being able to do it, however, as two very different things – and as we have seen in the past three years, improvement is slow. In the past three years, the percentage of communities that say they can define value, and measure value and ROI is relatively unchanged.

Last year, The Community Roundtable rolled out a new ROI Calculator designed to give community managers a straightforward way to start the conversation about ROI and calculate a defensible ROI number. It uses the value of answered questions in the community, and adds to it the networked value of answers surfaced by search, to generate a revenue number for the community - turning ROI into a basic equation: It boils the formula for community ROI down to a basic equation:

\[
\frac{(\text{Value of Answers} + \text{Networked Value of Answers}) - \text{Community Budget}}{\text{Community Budget}} = \text{ROI}
\]

The calculator focuses the discussion on the key engagement behaviors of almost every community – asking and answering questions and seeking information. However, it still proved to be a challenge to respondents – fewer than 1-in-6 could provide the needed data points.

Where calculating ROI breaks down:

- To calculate your ROI, you need five data points
- The number of searches in the community in the same time period
- The percentage of searches that were successful (produced a helpful answer)
- The community cost in that time period
- The financial value of an average answer

Not surprisingly, the biggest obstacle for respondents was calculating the financial value of an answer. In many communities, it’s something that hasn’t been calculated before, and it can be intimidating to estimate.

About 73% of respondents could not provide that number.
While the “value of an answered question” problem was expected, the second biggest gap surprised us.

Nearly two-thirds of communities said they had no way to know how many searches were performed in the community. That’s a huge problem. Making tacit knowledge transparent to a network is at the heart of why communities generate more value than other approaches, and as communities mature, the ability to surface previously submitted and approved answers is vital to community success. Platforms aren’t providing the information, and because of it, communities are having a hard time measuring ROI and value.

For those that overcome the limitations of their data, most have a positive story to tell. The vast majority of respondents who said they could calculate their ROI were generating positive returns. And of those who completed our calculator, more than 70 percent generated a net positive ROI.

**So where do we go from here? A few recommendations:**

1. **Don’t look at ROI as an output. It’s a strategic input.**
   A major value of calculating ROI is driving the conversation about community value.

2. **If you need data and your platform doesn’t provide it – give your platform vendor a nudge.**
   If you have a platform designed to support the key behaviors for your community, but you can’t tap into important metrics – raise a ruckus. The squeaky wheel gets the behavioral data critical to demonstrating ROI, and for platforms, being able to deliver that data is a competitive advantage – and should be in their best interest because it demonstrates the value of the platform.

3. **If you haven’t defined the key behaviors in your community – do it now.**
   You are far more likely to improve in areas you can measure, and you can’t measure key behaviors if you haven’t defined them.

4. **Define your metrics based on your value statement – not on your platform dashboard.**
   See #2 and #3. At the end of the day, your stakeholders don’t care that you’re using the platform dashboard. They care that you’re meeting your goals.

Last year – Rachel Happe said in her letter for the State of Community Management 2016 that we had about 24 months before the executive window of interest in community would start closing if communities couldn’t demonstrate value. We’re halfway there. In the current climate, there are a number of ROI models out there for communities – getting your data into one, seeing the results and being able to defend your numbers is a critical element of community survival.
Understanding Patterns in Community Maturity

The Community Maturity Model helps community professionals assess the maturity of a community in the eight competencies and helps illustrate indicators of progress. A look at how communities grow through the CMM:

STAGE 1: HIERARCHY

In Stage 1, organizations generally use social technology or community structures in an ad hoc manner. A community strategy is not yet completed, and resources have not been allocated to community management. Participation guidelines and content management processes (if any) are informal.

INITIATIVES/INPUTS FOR STAGE 1 COMMUNITIES:

- Finding an internal “owner”
- Recruiting one or more executive sponsors
- Building alignment on strategy and approach
- Identifying cross-functional champions
- Educating control functions – legal, IT, risk, compliance, HR – on social technologies and dynamics
- Starting a listening program

OUTPUTS:

- A community strategy
- A community management audit or gap analysis
- An operational framework and an initial roadmap

STAGE 2: EMERGENT COMMUNITY

In Stage 2, organizations focus on creating structures to support their community strategy. They’re dedicating resources to formalizing policies and processes. Communities in this stage have a strategy and staff in place and are creating structures for advocates, community content and programming, and reporting. Expectations for behavior and value are clear.

INITIATIVES/INPUTS:

- Revising the operational framework and roadmap
- Developing a comprehensive budget
- Formalizing an enterprise-wide governance structure
- Deploying social software
- Developing community management expertise and tools
- Creating metrics scorecards for various reporting levels
- Documenting response and escalation processes
- Defining and executing on community staff training needs

OUTPUTS:

- A detailed operational roadmap
- A governance structure that defines how community management will be executed and supported
- A documented approach to tools and processes
STAGE 3: COMMUNITY

In Stage 3, the community program is well-established and generating value. Communities in this stage have dedicated resources to carry out the community strategy and can match metrics to progress. Advocates and other members actively collaborate, and community staff focus on integrating the community into core organizational functions.

INITIATIVES/INPUTS:

• Building a community leadership program and governance structure
• Developing enterprise wide training
• Creating a community playbook
• Evolving social and community analytics from tracking activity to behaviors and influence
• Continuing to build internal champions across different organizational functions

OUTPUTS:

• Sustainable, documented community value
• Integration with affiliated corporate processes
• Distributed, adaptive leadership across the ecosystem

STAGE 4: NETWORKED

By Stage 4, organizations have undergone major philosophical, cultural and structural changes – or they have been a networked organization from the start. The community is central to the business, and business processes and models rely on a shared value approach. All management looks like community management, and although hierarchy and transactional processes do not go away, they are informed by and operate in an environment of shared value and networked communications.

INITIATIVES/INPUTS:

• Redesigning information architectures to support an integrated customer experience and/or employee experience
• Ensuring regular feedback and performance indicators align with an integrated customer and employee experience
• Redesigning the human resource function to hire, support, & develop employees based on alignment of values, interests and potential
• Changing how employees are rewarded and advanced, including the removal of many traditional hierarchical structures
• Changing the relationship of the organization to its market and providing value to the market above and beyond products and services.

OUTPUTS:

• Infrastructure that supports an integrated customer and employee experience
• Reorganization to support a networked approach
• Investment in and support of cultural and leadership change
• Evolution of core business models to incorporate shared value approaches that generate more value for every constituent/stakeholder group than they contribute
What’s Next for Communities?

This past year has been a watershed year for community. It’s now less of a question of IF and more of a question of HOW.

Organizations are starting to realize:

1. Organizations and their markets are communities
2. All management is community management
3. Everyone is the community manager of their personal network
4. If communities are intentionally managed, they create exponential opportunities

Implicit in this is a shift away from a focus on technology. That’s because for communities to succeed in creating employee or customer experiences, they need to be platform-agnostic.

There are many reasons for this – including the unstable landscape for community platforms. The acquisitions of Jive and Socious, launch of Workplace by Facebook, growth and evolution of Slack, and changes at other vendors all made headlines in the past year. As platforms shift, it’s your community’s rationale and strategic vision that provides critical consistency for your community efforts.

It’s not just the vendor environment that makes this critical. No platform, on its own, can carry you to success. Only savvy management of communities can do that. We noted earlier the persistent challenge for communities to move from Stage 2 to Stage 3 in the Community Maturity Model. It’s the inflection point at which an organization has made significant investments in strategy, technology, design, analytics and integrations but still struggles to change behaviors, processes and culture.

So how will communities get over the hump? Here are four things that we feel vendors, community program owners and stakeholders must continue to do.

Prioritize value metrics over vanity metrics. Community professionals are often not analysts by nature. Expecting them to effectively report how communities generate value is challenging. While many platforms have powerful analytics engines and access to data, they need intelligent reporting algorithms to make progress and value easier to see.

Understand what technology can – and can’t – do. Communities ultimately solve human problems – creating supportive and challenging places that enable individuals to thrive and reach their potential. Technology makes finding, connecting and communicating with others easier but it can’t do it alone.

This year for the first time, communities said they are spending equally on management resources and technology. It suggests organizations are starting to take the long view – and create a base for success by addressing fundamental social issues that allow technologies to succeed.

Close the gap between stated goals and resources. Community expectations are growing as they garner more strategic interest. However, a community management “team” of one cannot manage technology, engagement and advocacy, collaborate with functional groups to integrate the community into the day-to-day work of the organization, train others in community management, evangelize internally, oversee content and programming and run regular reports for stakeholders. Community professionals need to ask for needed support, and organizations need to provide resources consistent with their strategic and tactical expectations.

Define community roles more clearly. Today, “community manager” can describe everything from someone who oversees a Snapchat channel to someone in charge of business models, staff and budgets who reports to an SVP.

Our research and the Community Skills Framework can help rationalize expectations, and savvy community professionals are using the growing market for their services to push for better definition of roles and responsibilities and educate others about communities and community management.

So what’s next? We need to establish the value of community management, integrate community work across organizations and navigate the ever-shifting technology landscape. In short, we’ve reached the end of the beginning.

Now the ‘hard’ work begins.

Rachel Happe
About The Community Roundtable & TheCR Network

Community accelerates your organization’s potential by connecting employees and customers in meaningful ways.

At The Community Roundtable, we collaborate with clients to implement proven, practical strategies for better communities.

Clients rely on our models, research, and peer networks to take their communities to the next level.

Professional Development

TheCR NETWORK

TheCR Network is the foundation for all of our research and advisory work at The Community Roundtable. Community professionals from more than 100 organizations have joined TheCR Network and benefit from our members-only programming, content, resources and networking opportunities, as well as a powerful cohort of peers who provide advice and expertise on the critical topics facing community leaders today.

TheCR and TheCR Network collaborate on a simple shared purpose: To demonstrate the value of community management, through the co-creation of research that demonstrates its impact. We also share the benefits of more than a millennium of collective expertise in community management among our members.

COMMUNITY MANAGEMENT TRAINING

The Community Roundtable has a variety of training solutions—from in-person workshops to on-demand courseware for community managers and executives.

TheCR Academy provides a growing curriculum of on-demand training assets for full- and part-time internal and external community managers and includes on-demand videos, worksheets and case studies.

To keep abreast of our latest research and work, sign up for The Community Roundtable newsletter, subscribe to TheCR blog and follow us on social media.
Assessment and Advisory Services

COMMUNITY PERFORMANCE BENCHMARK

TheCR’s Community Performance Benchmark evaluates a community’s maturity on each of the eight competencies of the Community Maturity Model, compares the community with the communities that took part in the State of Community Management research, and makes recommendations for how you can strengthen your community performance. It’s information that gives you the ability to set priorities, make decisions and manage budgets with confidence.

ADVISORY SERVICES

The Community Roundtable offers a full array of advisory services for organizations of all sizes and in all places on their community journey. Our advisory services tap into our wealth of research on community management — both qualitative and quantitative — and our perspective on what works well in community and what does not.

Advisory can take the form of a structured strategy session or as an ongoing, retained service for periodic feedback and advice.

Research

Our growing research portfolio includes The State of Community Management, Community Careers and Compensation, The Social Executive and The Community Manager Handbook. All of our research is designed to demonstrate the value of communities and community management.

COMMUNITY CAREERS AND COMPENSATION

The Community Careers and Compensation report series explores the day-to-day work and skills of community management professionals across all industries and use cases. The Community Skills Framework derived from the surveys helps shape job descriptions and gap analysis for large and small community teams.

THE SOCIAL EXECUTIVE

The Social Executive research explores how executives connect business strategy and social tools and approaches, use those approaches for their personal goals, and the process and triggers that move executives to a more mature use of social in the organization. It’s valuable information for anyone trying to improve executive engagement.

THE COMMUNITY MANAGER HANDBOOK

The Community Manager Handbook: 20 Lessons from Community Superheroes highlights best practices from current and former TheCR Network members, addressing many of the complex challenges they faced in starting, building and growing their communities. Case studies coupled with research-based commentary provide community professionals with ideas and strategies for effective community management.
The State of Community Management 2017 would not be possible without the support and advice of the members of the SOCM Working Group from TheCR Network.

Research is a shared value in the Network, and these members stepped up to:
- Review and give feedback on the goals and timeline
- Raise issues and opportunities for insightful new and revised questions
- Explore issues related to specific aspects of the 2017 survey
- Support and advocate for participation from community professionals across the globe

The input and counsel of the skilled and experienced members of TheCR Network helps ensure this report and the insights derived from it are as practical and useful for community managers and program owners as possible.

We couldn’t do it without you – thank you!

Acknowledgments

The Community Roundtable Team – 2017