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TRANSCRIPT

Allison Brotman on Community Strategy

**SUMMARY KEYWORDS**

community, strategy, organization, important, trends, resources, alison, define, measuring, created, educate, data, section, share, feedback, starting, uk, opportunity, success, tour

**SPEAKERS**

Anne Mbugua, Allison Brotman

**Anne Mbugua** 00:03

Hi, Allison, if you could introduce yourself and tell us what you do.

00:08

Sure. So my name is Alison Brockman, and I have the pleasure to lead our learning and community experience team at UKG. Right,

**Anne Mbugua** 00:18

Alison, tell us how thinking about strategy affects your community work.

00:26

So I believe creating a strategy is an important step for any community program. No matter where you are, if you're just starting or if you've got a mature program, it's really important to boost your strategy to create that effective strategy helps define the purpose, the value, and actually defined what success looks like. It can help you guide how you invest your time and resources and provide a roadmap for where you're going. And I wouldn't be overwhelmed by creating this perfect document. It should be a living, breathing resource that can guide the team. And as business goals evolve, and market conditions change, the strategy needs to adapt as well. So don't think of it as a one time kind of one and done should be living and breathing and evolve with you and your business. So I've been thinking about strategy a lot, because at UK CI, we just went through a merger. So a couple years ago, we were ultimate software and Cronos. And we merged to become UKG. And so as you can imagine, each organization had its own strategies, its own product portfolio, its own customer base, its own community, and so on. So over the last couple years, our new UK G organization has been working to define those new UK G specific strategies and goals and, and one of those that we needed to develop was the new community strategy. So we've been doing this work at UKG. Very recently. So it's very top of mind for me. If you like I can share a little bit about how we approached it, if that would be helpful.

**Anne Mbugua** 02:12

Yes, that would be insightful.

02:16

So we started with the discovery, so really understanding the current state of our ultimate software and our Cronos communities and what enables success for them today. And then we went on a listening tour. So we asked our stakeholders, no individual contributors all the way up to our C level stakeholders. We talk to our business partners or community members, we actually talked to customers, and external partners, to gather feedback on what was important to them about the community. We looked at a competitive benchmark study for industry to understand what those expectations might be for the community experience for customers in our market. And we did an accessibility review. So in collaboration with a third party partner, we reviewed some of our ideas and prototypes to gather feedback on how to make our new online space more open and accessible to people of all abilities. So this discovery was really important first step for us, right. And then we synthesized all that information, right, pulled it together to define what our opportunity was, for our new UKG communities strategy. We established our vision, we created our shared purpose and our shared value. I'm sure you've heard of, you know, a lot of this language, yes. But it was important that we understand why we're coming together. What we're going to do about that. We created our new name, brand or colors. We established how we wanted people to feel when they were part of our community. So those emotions that we wanted them to express the effort that we wanted them to put in those key behaviors, and then establish what success looks like set some goals and targets. And, you know, it's not enough to just measure engagement or activities, but we're really trying to think about how do we connect what's happening in the community and what those community level goals are to our higher level business schools. So so that we can show the impact that the community is having at the business level at the highest level. And then we shifted years right to think about how to put all this into action how to go forward and implement the processes, the programming the content, and of course, the technology to enable it all. And that's where we are right now, in our implementation phase.

**Anne Mbugua** 05:09

I love the way that you run it at all, because that really is strategy. Right? So I'm curious what jumped out at you in the strategy data from this year's date of community management research?

05:26

Well, I've been in this space for a few years, and I was really happy to see the positive trend and that steady increase over the last few years, where more and more organizations have an approved operational and measurable community strategy that was really encouraging to see that more organizations are in that, that category. And then on the other end, I was really surprised to see that 15% of our communities still don't have a documented strategy, right. So I would encourage everybody, you know, this is where you are, it's okay, you know, just take some time, set aside some time to start working on it. And it will pay dividends for you know, it will help you define the value you're bringing to your business will help you make the best use of your resources, even if your resources are just your own time, it'll help you make the best use of your own time. And it can tell you what success looks like. So that if you're the type that wants to reflect, you know, how am I making an impact? How am I doing? Right, you'll have that measuring stick to rule against,

**Anne Mbugua** 06:37

right. This is a great segue, actually, into what advice you would give them a community professional, right, who is starting to dig into strategy, right? What are the things that you would sort of let them know?

06:52

So I would recommend starting with the listening tour, I've had the privilege and the opportunity to develop a few different strategies for communities at different organizations. And I've always tried to start with a listening tour. And to be really intentional about gathering feedback and insights through qualitative, quantitative, whatever I can get my hands on, setting up with setting up meetings with individuals across the organization, people I haven't met yet, people who are active in the community outside of the organization, even talking to non members to understand why they haven't joined yet. Really looking for that kind of 360 degree feedback. Right, right. And then looking at data, so customer data, if you're a product organization, look at the product data. If you're a support organization, you know, look at your case data and trends, look at your service data and trends, look at customer feedback, right? Look outside your organization. Now, how are others, you're solving the same problem? What are best in class organizations in your industry doing, maybe think about benchmarking against a couple, to see how you compare against them, right, and then put it all together, try to make sense of it all, you're likely going to have a lot of ideas. And it think it's important for you to acknowledge your community can't be everything to everyone. So look for those reoccurring themes, look for those most important audiences, and then try to target those target those business problems to solve a target those audience segments. I always like to share back what I found. So go back to as many of those business partners or stakeholders and say, you know, here's what I heard. Is this right, try to validate, and see if they have any kind of follow up are additional insights that can really help fill in the details of a robust plan. One of the things I really like to do is use the community strategy development as an opportunity to educate how we're building the community, and to bring others along with us on the journey. So to do it as collaboratively and transparently as possible. Of course, not putting any extra work on on your business partners, but just bringing them along with you on the journey.

**Anne Mbugua** 09:26

Right, right, because that's a lot of data and a lot of information. Once you do like the listening tours, and you do the one on ones. I love the idea of having to share that back. Right. Because that really also helps you to evaluate some of that information that you're getting. Yeah, so my other question then would be, how have you used the state of community management research in your community work?

09:53

So I've used the research, but the state of community management, the careers and calm consideration and several other resources from the CR, as part of building out our community use case and strategy here at UK, g, in my previous roles as well. And sometimes I send it to individuals in our organization who are interested in learning more about community management as a profession. Right. So maybe they're interested in partnering with our team, or maybe they're interested from a career development and growth perspective. So I think the the research and resources are a great way to educate and spark that interest.

**Anne Mbugua** 10:33

Yes, absolutely. So I'm the Milan, last question for you here is, what else are you excited to read about in this year's report?

10:45

I'm excited to see the culture section. I think this is a really unique time that we're all living in. And I wonder how that's impacting the culture of our communities. And I'm anticipating a connection between the strategy and the culture, seeing how those might relate. I always love the metrics and measurement section because I want to see how others are measuring their community what metrics are prioritizing, that's a good opportunity for me to reflect on what we're doing within our own team. Right, and then probably the leadership section. So we all know how important executive sponsorship is to a strong community program. So I'll be interested to check out the leadership section to see if there's any new insights or trends.

**Anne Mbugua** 11:34

That's fantastic. Well, Alison, thank you so much for your time and for sharing on strategy and educating us a little bit more on that. So this is where I will stop the recording.