

THE STATE OF COMMUNITY MANAGEMENT 2021



THE COMMUNITY
ROUNDTABLE

Communities Accelerate
Impact



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Welcome to The State of Community Management 2021

The last year brought a lot of change to all aspects of our lives. As we adopted new ways to live and work, there was a pocket of practitioners within forward-thinking companies that were ready for this moment. Up until recently, many toiled away in relative anonymity, while others had begun to attract the attention they deserved. And then COVID-19 struck and “the cat was out of the bag.” Companies scrambled to optimize for remote work and virtual collaboration with customers. Community managers stepped into the void, providing the necessary structure and strategic guidance companies needed to succeed. And just like that, the age of community had begun.

Here at The Community Roundtable, we’ve anticipated this inflection point for a few years, but didn’t expect it to arrive quite the way it did. If you had “Once in a Lifetime Pandemic” on your bingo card, congratulations, you win!

In 2017 we began to see executive enthusiasm for community approaches, especially in what we consider “best-in-class” community programs. By 2019, communities reported compelling ROI and executives were well aware of the opportunity, not only tuned into community ROI, but also getting involved in approving community budgets. In this year’s data we see, not surprisingly, even more attention being paid to community programs. Community impact is accelerating at organizations large and small.

This research wouldn’t be possible without the members of TheCR Network, our peer network for community leaders. They come together regularly to share what they’re working on, critique each other’s approaches, and celebrate small wins along the way. The State of Community Management Working Group doubles down by working with us to refine the survey instrument, identify interesting trends in the data, and provide feedback on early drafts of the report. Their commitment to their peers and the industry in general should be applauded. Turn to page 7 to see the Working Group and if you know any of them, please thank them via your favorite social channel.

Now it’s time to dig into the 2021 State of Community Management research! We hope the insights in this year’s report help you engage your members, grow your team, and operationalize your community program.

NOTE: Throughout this report we reference the Community Maturity Model (CMM), the Community Skills Framework, and the Community Engagement Framework. More about these foundational models and frameworks can be found starting on page 38.

Executive Summary

Online communities accelerate impact. If you're reading this, you probably already knew this. Over the last 18+ months, the global COVID-19 pandemic put community to the test on the world stage. Communities connect employees, and the overnight rise of the remote workforce showed that you don't have to be in an office to create meaningful organizational change.

This year's research uncovers a considerable jump in strategic maturity and funded roadmaps, suggesting that the industry was ready for this pivot and inflection. Community leaders were there at the forefront; they (you!?!) already knew how to cultivate productive communities. Over the last year, successful communities shone as beacons of productivity, where individuals were comfortable, empowered, connected, engaged, and seen.

This year we explored our research findings across the eight competencies of the Community Maturity Model. By reviewing the survey data through this lens, we are able to see the impact of community programs in the last year, and provide guidance for what's coming next.

Key Findings

1. Executive interest and engagement has increased dramatically.

In 2021, executives have an overwhelmingly positive perception of community approaches. Thanks in a large part to the visibility of online communities driven by the COVID-19 pandemic, 83% of executives have a positive perception of community potential – and this translates to increased engagement and support at the executive level.

2. The strategic maturity of online communities has improved significantly.

In 2021, 37% of all communities reported having an Advanced Strategy; one that is approved, operational, and measurable; up from just 22% in 2020. This dramatic jump is an encouraging indicator of both a commitment to current community programs and continued investment in their future development.

3. Community maturity correlates to increased value.

Mature communities have a transformational impact on their members and as a result, outsized value for organizations that launch and cultivate them. The last year saw so many organizations stretched thin on time, resources, or access, and communities provided one of the few ways to ease this increased burden. Individuals (both customers and employees) have seen the positive impact a community program can have on their day-to-day life, it's unlikely we'll see a return to business as usual (or as it used to be).

Methodology

The data in this report were collected from 242 community programs in January and February 2021.

Members of TheCR Network State of Community Management (SOCM) Working Group helped define the research scope, refine the research instrument, and prioritize the most meaningful data. This group's contributions improved the scope, delivery, and depth of the research.

Members of the State of Community Management 2021 Working Group



Jillian Bejtlich
Zapier



Ashleigh Brookshaw
ASSP



Keri Kersten
UKG



Ryan Priddy
Lockheed Martin



Becky Scott
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Esha Singh
Workday



Tammy Triplett
Leidos



Mark Williams
NI

Research participants are solicited from The Community Roundtable's contact list, members, and clients. Because this is a self-selected group of respondents, the data may not reflect overall industry trends. It reveals what a portion of the community management space is experiencing and tends to represent more mature community programs.

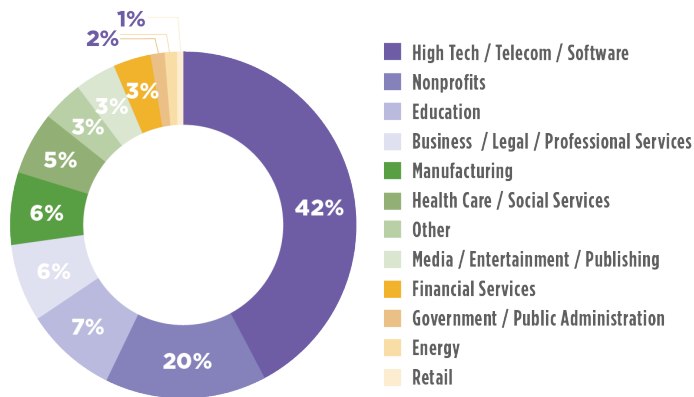
Once collected, The Community Roundtable's research team cleans, segments, and analyzes the data. This year we segmented the data in the following ways to reveal additional insights:

Average Overall	average of all communities in the research
Advanced Overall	average of communities with strategies that are approved, operational, and measurable
External Average	average of customer- and market-facing communities
External Advanced	average of customer- and market-facing communities that have an approved, operational, and measurable strategy
Internal Average	average of employee-facing communities

Demographics

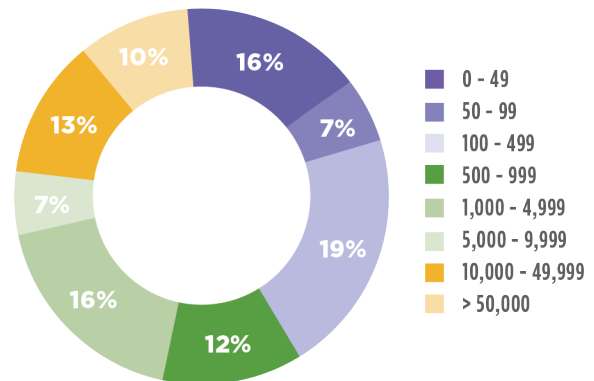
The State of Community Management 2021 research participants represent a wide range of global community programs that include internal, employee-facing, community programs, and external, customer-facing programs. They represent myriad community sizes, ages, industries, and use cases. To effectively analyze this diversity and identify meaningful insights, we segmented data based on many of these demographic differences.

Industry



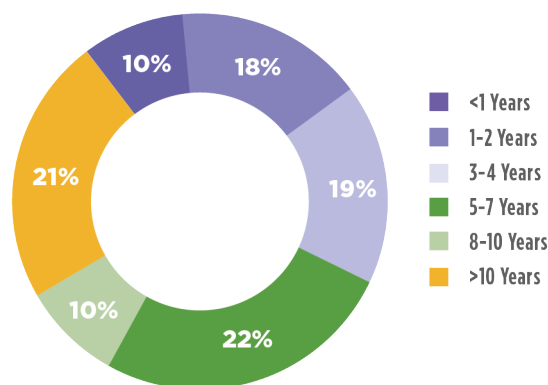
The industries represented in this year's research are relatively consistent with previous years. The technology, non-profit, education, and business services sectors are most prominent. Manufacturing grew significantly from 2020, with media/entertainment/publishing continuing to decrease.

Organization Size



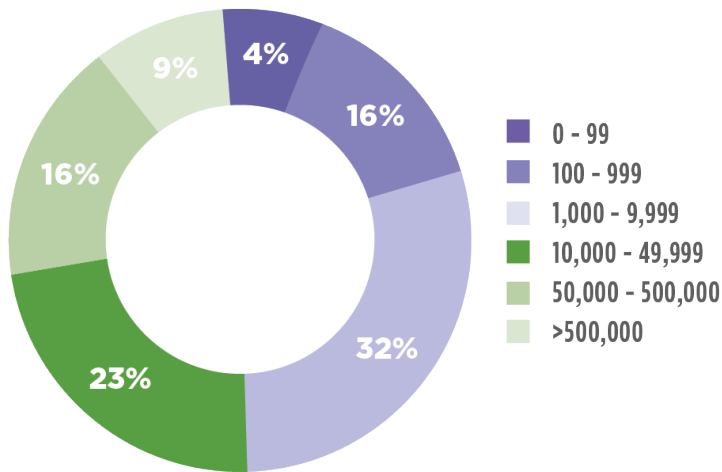
In this year's research sample the number of very large organizations grew, and as a result the average population of community programs may show more maturity because large organizations tend to have more operational maturity. Additionally, this operational maturity typically results in higher performance and therefore has an impact on average performance of the entire data set.

Community Age



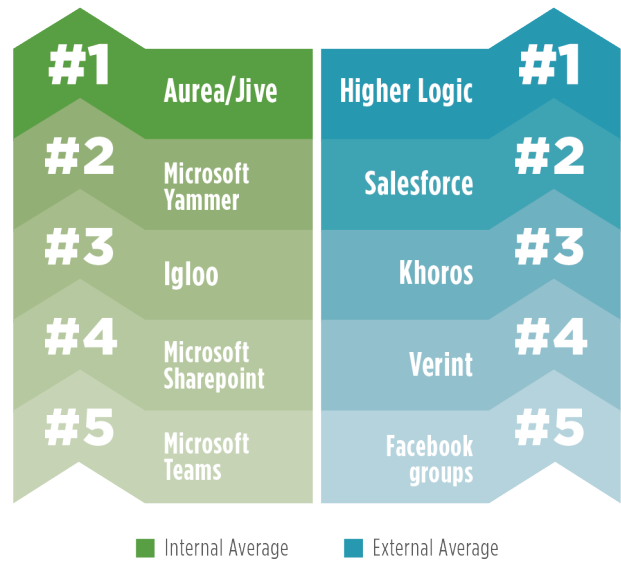
As in prior years, this year's population represents a wide range of community ages. Community age, however, does not have a consistent correlation with maturity or performance. Older communities do tend to be, on average, larger than younger communities.

Community Members



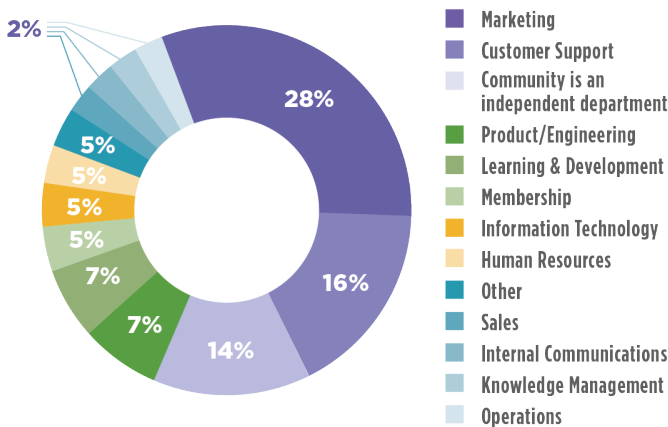
The average community size of this year's population represents a more diverse range than in previous years, with about 20% reporting below 1,000 members and only 9% reporting more than 500,000 members. The majority of community programs represented report they have between 1,000 and 499,999 members.

Primary Community Platforms



This year's research population uses a variety of platforms. The research specifically asked about over twenty different platforms and the option selected most often was "other", indicating a fragmented community platform market. Based on survey respondents, the top five primary platforms for internal and external programs in this research sample are listed above.

Reporting Department for Community Program



As in years past, there is no dominant functional reporting structure for community programs. Many community programs are independent departments without direct functional oversight.

COMMUNITIES ACCELERATE IMPACT



STRATEGIC PLANNING

37% have advanced strategies **29%** have funded roadmaps



NETWORKED GOVERNANCE

79% provide network enablement



EXECUTIVE SUPPORT

83% have positive perception **60%** of budgets approved by senior executives
62% see increase in executive engagement **67%** include executives in strategic decisions



COMMUNITY TEAM

83% have full-time staff **54%** receive training

3.5 full-time staff **1.7** part-time roles



ORGANIZATIONAL VALUE

59% directly impact business objectives **74%** positively impact brand & culture



INTERNAL IMPACT

77% increase workplace efficiency **64%** support culture change **52%** increase speed of innovation



MEMBER VALUE

75% deliver faster answers **60%** prompt new ideas



EXTERNAL IMPACT

56% increase brand awareness **54%** improve self-service support

Community At An Inflection Point

Online communities have existed since the dawn of the Internet and for many years they existed primarily in the social sphere as places to connect around shared interests. Gaming was one of those interests and as gaming communities grew in popularity, gaming companies started to participate, sponsor, and invest in them. Companies discovered a powerful approach to building interest, increasing use, and supporting players. Online communities that we would recognize today really started taking hold in the 1990s and early 2000s. As they did, individuals were tasked with ensuring they were functioning, safe, and stayed on topic and the role of the community manager emerged.

Brand - or organizationally sponsored - online communities emerged around 2000 as more companies recognized the benefits they enabled. By 2010, when the first edition of this report was published, there was growing awareness of the business value of communities through decreased response times, enhanced affinity, and empowered advocates. The goal for this research was to document the practice and value of community management and the impact of communities on organizations.

What is striking over more than a decade of research is that the practices of good community management have not changed significantly, although they have become more explicit, documented, easier to teach, and valued. But good community management has remained good community management - and community teams with more resources do more of it, which leads to better results. It is community leaders that have developed this maturity, applied it in new places, and shown all of us what is possible.

Twelve years of this research has identified good community management practices, documented those practices, and created a standardized way to think about and benchmark them. This research has also developed a way to calculate the financial value generated by communities in a way that is comparable across a vast array of communities. While that financial value is only a small part of community value, it allows organizations to evaluate, commit to, and invest in community approaches. By making community management practices explicit and capturing the investment and financial value of successful communities, this research turned tacit knowledge into explicit terms that could be explained and acted on within current organizational governance systems. The State of Community Management continues to provide a missing link for those executives, intrigued by community approaches, but unable to commit resources to them



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calculate
your community
ROI? Use our ROI
Calculator!**

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without understanding how they would benefit the organization explicitly.

Executive interest in community approaches has varied since 2009, with internal and external communities gaining or losing interest as the technology, economic, and the social environment has changed. While interest has grown, it has been slow, inconsistent, and not always sustained. It has been frustrating to see many successful community programs disappear when executives change or companies evolve

under new leadership or ownership. It has been exciting to see new applications of community approaches succeed. Interest has ebbed and flowed, slowly growing in appeal but not hitting an inflection point, which relegated communities to a nice-to-have approach in spite of the overwhelming evidence of their value. Until recently, in terms of community maturity, we had not reached the tipping point and community programs remained vulnerable.

Over the last two years, the place of community in organizations has shifted, with community becoming a more commonly required investment, particularly in the start-up space. The COVID-19 pandemic, tipped communities from a nice-to-have to a must-have. Suddenly, it was obvious why organizations wanted to connect employees and customers to each other and the organization via a transparent and accessible digital network. As a result of the pandemic, 71% of communities saw their visibility increase, 67% of them with an added increase in urgency. 74% of community programs report an increased recognition of their value. 62% of communities experienced an increase in engagement with 17% of those seeing a significant increase. The pandemic propelled online communities into the spotlight in a world where it was no longer possible to connect and build relationships at events, in retail environments, at off-site meetings, or in the office.

The visceral new understanding of how online communities can connect employees and customers, while expanding access, has galvanized interest, commitment, and involvement from executives. This rapid increase in interest, combined with a maturing community management profession, enabled strategic planning - backed by data, methodologies, success stories, and standardizing roles - and the professional development required to support a broad expansion of community programs and roles. This year's research uncovers a considerable jump in strategic maturity and funded roadmaps, suggesting that the industry was ready for this pivot and inflection.

“



In 20+ years in the community industry, I have never before see this level of interest and investment from executives across all company types. The increase in investment and hiring in 2021 has been incredible to see.

Brian Oblinger, Strategic Consultant

[CLICK TO HEAR BRIAN](#)

”

While no one knows what the future holds, there is a consensus that the workplace, customer channels, and markets will remain hybrid; employing digital communications platforms so that individuals can access and engage in-person and virtually. The sudden shift to online-only during the pandemic, however, revealed that digital success is not guaranteed with the right technology alone. Far too many organizations ‘lifted and shifted’ practices from the physical world into the online world in ways that increased stress for individuals, without taking advantage of the flexibility made possible by digital platforms.

Community ecosystems offer organizations the potential of cohesive digital environments in which every customer and employee has access to what they need, when they need it – unconstrained by physical limitations. Community professionals know how to cultivate environments in those spaces where individuals are comfortable, empowered, connected, engaged, and productive. The biggest differentiator between those organizations that can harness this potential and those that can’t, is whether they understand the need and value of community management leaders and their teams.

PRACTITIONER PERSPECTIVE

Jillian Bejtlich, Zapier

“ Having a Center of Excellence (CoE) allows a community to scale and adapt with an incredible amount of consistency and accuracy. In the communities I’ve worked with, the CoE became THE place for community staff, advocates, and other power users to find the information and resources they were looking for. And that meant less time answering redundant questions, significantly more transparency, and more community users exhibiting the behaviors we were looking for. ”



Community Maturity Benchmarks

Internal and External Communities, in aggregate, have equally mature management but that maturity reveals different priorities.

Internal Communities are more advanced in policies & governance, tools & technology, and content & programming.

External communities excel at strategy, culture, community management, and metrics.

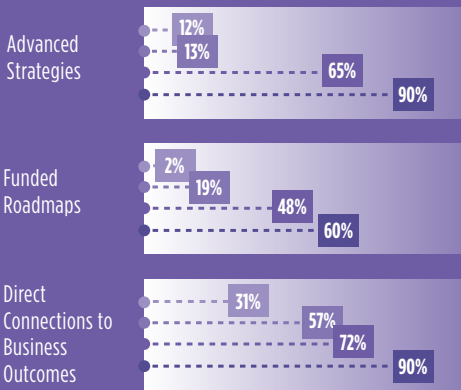
● Internal Average ● External Average

	STAGE 1	STAGE 2	STAGE 3	STAGE 4
Strategy		●	●	
Leadership		● ●		
Culture		●	●	
Community Management		● ●	●	
Content & Programming		● ●		
Policies & Governance			● ●	
Tools & Technology		● ●		
Metrics & Measurement		●	●	

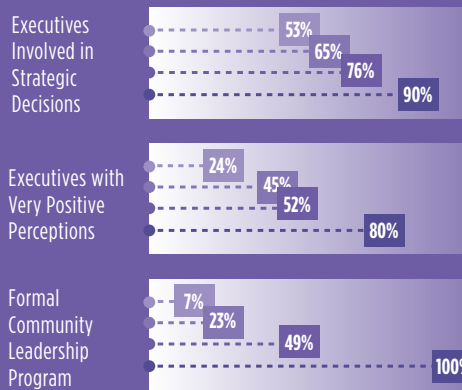
KEY MATURITY MARKERS

KEY: ● STAGE 1 ● STAGE 2 ● STAGE 3 ● STAGE 4

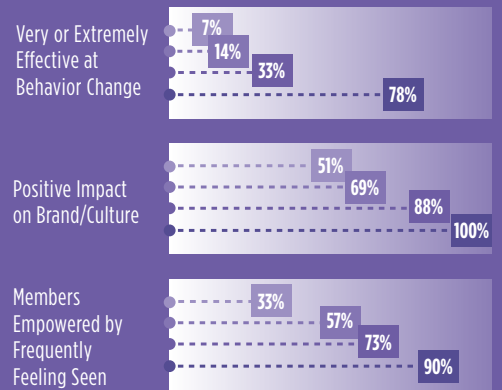
STRATEGY



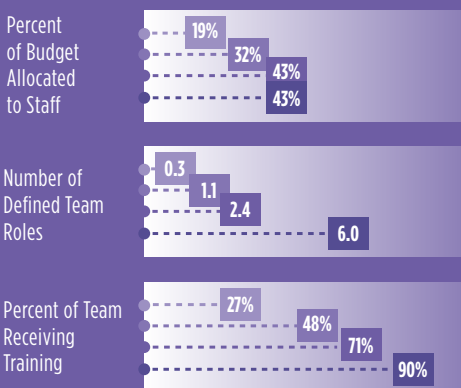
LEADERSHIP



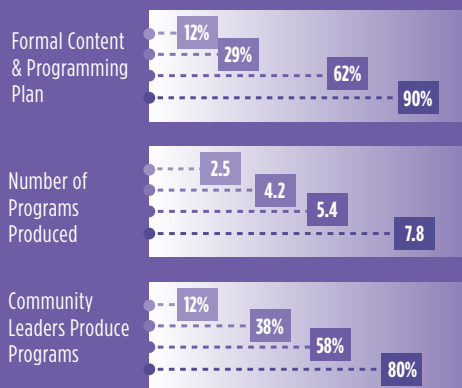
CULTURE



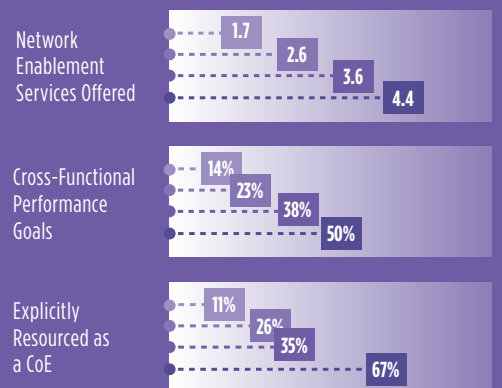
COMMUNITY MANAGEMENT



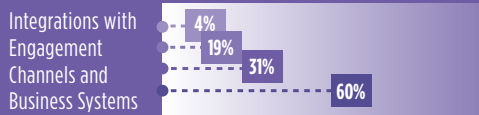
CONTENT & PROGRAMMING



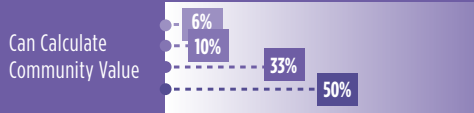
POLICIES & GOVERNANCE



TOOLS & TECHNOLOGY



METRICS & MEASUREMENT



Executives are switched on, engaged in community decisions, and **COMMITTING RESOURCES**.



Business Outcomes can be directly connected to **29%** of community programs.



Communities are **2X** as likely to have Advanced Strategies and funded roadmaps than last year.



Our executives see the Community as the best way to showcase customer-centric solutions, deflect support cases, and foster collaborative success.

Esha Singh
Workday



RECOMMENDATIONS

FOR EXECUTIVES

- **INVEST** in defining strategic and operational metrics.
- **RATIONALIZE** community team roles against workload.
- **APPROVE** budget for community team hires to close leadership, programming, and metrics gaps.
- **MENTOR** community team leaders in business and program management skills.

FOR COMMUNITY TEAMS

- **DEFINE** a community leadership program.
- **DEVELOP** platform integration requirements.
- **MAINTAIN** an updated community program roadmap.
- **ARTICULATE** activities and time spent to coordinate, support, and create solutions for cross-functional peers.

Strategy

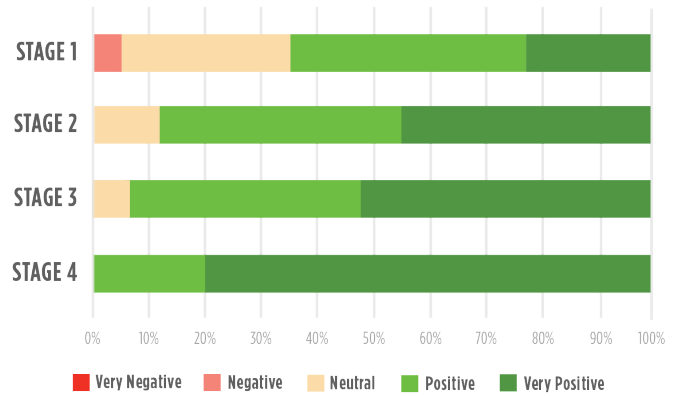
Executives Are Committed

We saw a significant increase in executive interest and involvement in 2021 when compared to our 2020 State of Community Management data. While the data is from a different research sample and not a direct comparison, the rate of involvement – from approving budgets, to participating in community decisions and receiving reports – is up significantly and for that reason alone it is meaningful. This is also a trend we see anecdotally reported by community professionals and in the brisk increase in community management job openings and hiring.

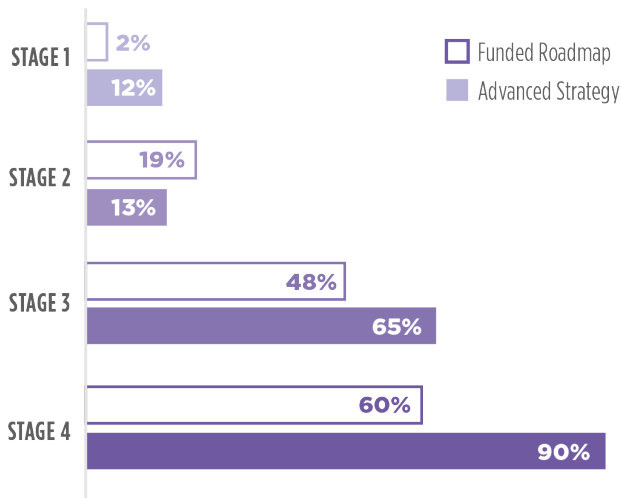
In 2021 executives have an overwhelmingly positive perception of community approaches. It was not too many years ago when executives were either unaware, dismissive, or skeptical of what communities could do. In 2021, thanks in part to the visibility of online communities driven by the COVID-19 pandemic, 83% of executives have a positive perception of community potential – 45% of whom are very positive. This positive perception, which starts off well, increases as community management matures. Communities in Stage 4 of the Community Maturity Model benefit from executives that are all positive in their perception of the community, 80% of whom see it as very positive.

That positive perception of executives seems to translate into commitment in 2021, whereas in other years positive executive perceptions didn't necessarily seem to impact community strategy or funding. In 2021, 37% of all communities reported having an Advanced Strategy; one that is

Executive Perceptions of Community Programs

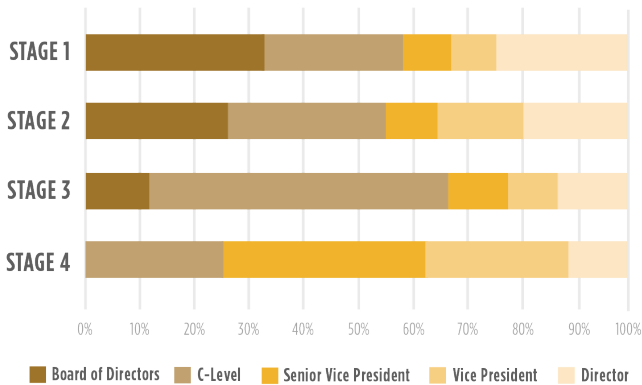


Maturity of Community Strategy and Roadmap



approved, operational, and measurable. 29% of all community programs have a funded roadmap. By comparison, in 2020 only 22% of community programs reported having an Advanced Strategy and only 16% had a funded roadmap – both of which changed little from 2019. When looking at the maturity of strategy and funded roadmaps by stage, it is not surprising to see more funded roadmaps in Stage 2 than Advanced Strategies, which often require funding to develop and refine. The jump in strategy and funding this year is an encouraging indicator of both commitment to current community programs and future development.

Executive Level Approving Community Budget



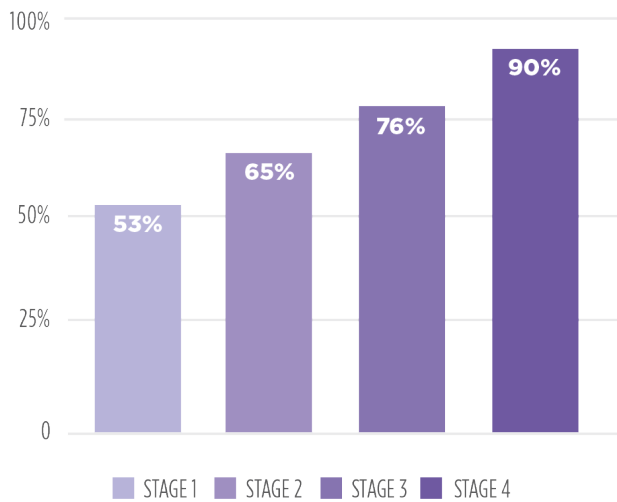
“

As community programs mature and become more established, budget approval moves from board to c-level and other executives. This suggests that community programs no longer need to ask for exceptions to established budget allocations and become defined operating units.

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As community programs mature and become more established, budget approval moves from board to c-level and other executives. This suggests that community programs no longer need to ask for exceptions to established budget allocations and become defined operating units.

Executives Involved in Strategic Decision-Making



What is most striking about executive commitment is how involved they are in community programs. In 2020, executives were involved about 25% of the time in community decisions. In 2021 executives are involved in strategic decision-making for 67% of community programs. While the data comparison is not direct, it is a striking increase given that executives' most limited resource is not money but time.

The growing commitment and investment on the part of executives suggests that communities are strategically important and firmly on the radar of executive teams.

PRACTITIONER PERSPECTIVE

Esha Singh, Workday

“

The Workday Community became a strategic priority as our leadership committed to leveraging the Community to positively impact our members' experience with Workday. Our executives see the Community as the best way to showcase customer-centric solutions, deflect support cases, and foster collaborative success.

”



CLICK TO HEAR ESHA

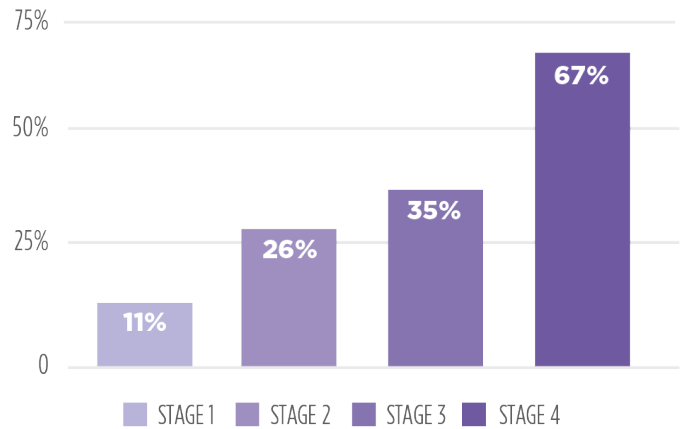
Leadership

Centers of Excellence Enable Distributed Leadership

Centers of Excellence are groups that are charged with enabling their organizations with a specific practice or expertise and often have other names, whether that is an Enablement Group, Adoption Team, or Internal Consulting. Historically, this has not been the role of community program teams, who were generally tasked with managing one community.

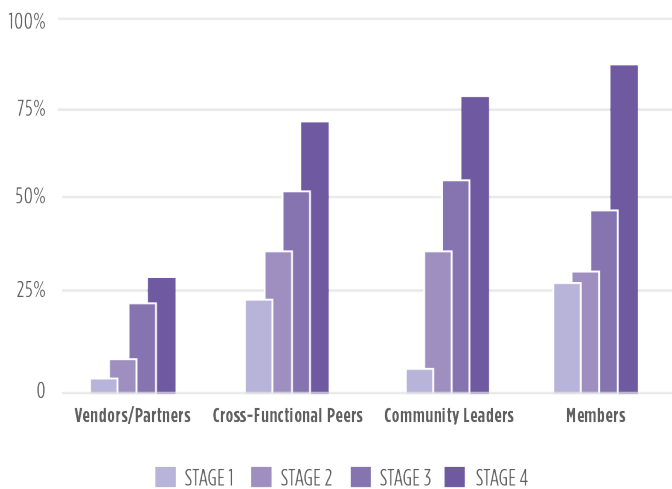
However, as communities have become more integrated into organizations and as they address more objectives across the employee and customer experience, more people are involved in their management and leadership. The result is growing demand for community management expertise that falls on the community team to deliver. We see this evolution accelerate as communities mature. Only 11% of early communities are explicitly resourced to be centers of excellence – transitioning

Community Teams Explicitly Resourced as a Center of Excellence



to a majority of community teams for the most mature community programs. This dynamic is also seen in the growth of groups outside of the community team producing programs in the community. At Stage 4, a majority of communities have cross-functional peers, community leaders, and community members leading programs – all of whom need guidance or training on how to do so effectively.

Percent of Communities in which Other Groups Produce Programs



community programs mature, they tackle metrics and reporting, consulting, and for some, enterprise governance. Community budgets reflect this transition. In Stage 1, community management resources are only 19% of the total community budget. By Stage 4, 43% of community program budgets go toward talent acquisition and training.

These services correlate with increased reporting responsibilities and increased expectations for engagement for cross-functional peers. More people and groups are involved in both

managing aspects of communities, interested in their performance, and measured on their engagement. No longer are community programs isolated and discrete. Instead they are expanding to align organizational groups in order to address myriad employee and customer experience objectives.

In integrating multiple stakeholder groups in decision-making, management, performance, and reporting, communities demonstrate how organizations can transform from rigid and hierarchical, and opaque governance can be transformed. Community programs, by including multiple groups in important management processes, make them transparent and accessible, and shifts management into an enabling role that oversees the coordination of governance and infrastructure, not a role that mandates how and when people work.

Communities evolve into and model the distributed and networked governance that so many organizations are hoping to adopt. Those organizations that are struggling to define how to transition would be well-served by understanding, investing in, and adopting community approaches.

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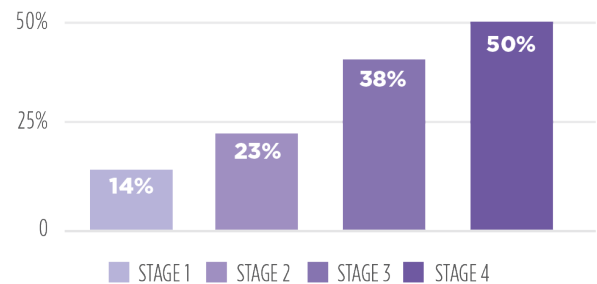
No longer are community programs isolated and discrete. Instead they are expanding to align organizational groups in order to address myriad employee and customer experience objectives.

”

Stakeholders Who Receive Community Reports



Community Programs with Cross-Functional Performance Goals



PRACTITIONER PERSPECTIVE

Janet Stiles, AAMC

“

One of our community managers, who was involved in one of the first communities we launched said, 'Wow, I really wish I had had this [Center of Excellence] when I started!' These documents and artifacts really help provide guardrails and set expectations. They're empowering our community managers.

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CLICK TO HEAR JANET

Culture

The Core of Community Value is Culture Change

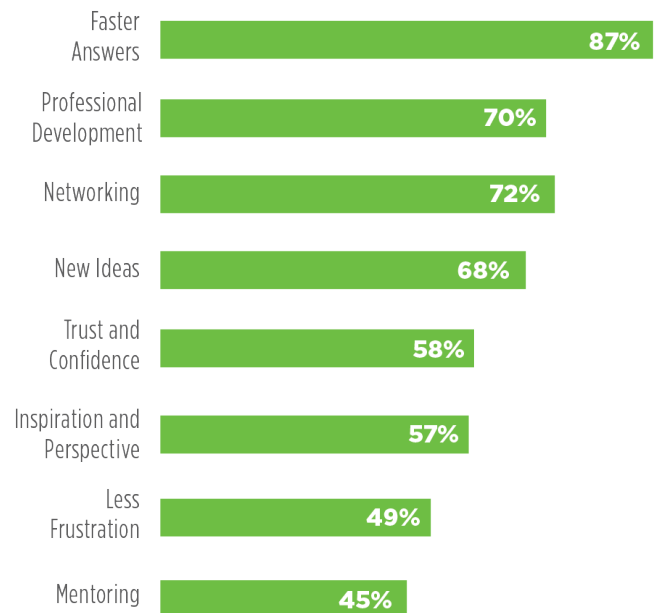
Communities engage members by generating intrinsic rewards, inspiring them to contribute, and giving them the validation and encouragement to stay engaged. The pull created by communities is also what makes them powerful mechanisms for learning and change.

Empowered Members Adopt New Behaviors

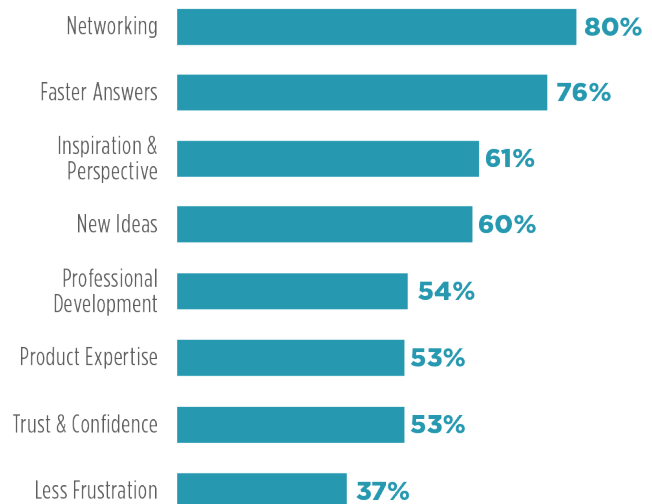
Communities are optional social structures with no explicit control over individual members – with no ability to force or coerce individuals into engaging. That makes them challenging to facilitate and grow but when successful, they offer immense capacity for learning and productivity because engagement and participation is offered generously. When engagement is offered rather than prescribed, it doesn't trigger the resistance and anxiety that makes learning and change hard. The psychologically open mindset of community participants makes them much more likely to listen to and learn from others – and in turn be influenced to change.

Communities tend to attract and engage new members by addressing concrete needs – getting answers quickly, building professional networks, uncovering useful ideas about how to accomplish something. Over time, communities also provide more complex value like professional development, trust and confidence, mentoring, and inspiration. For many people who are stretched thin on time, resources, or access, communities are one of the few ways to find these opportunities and they can have a transformative impact on their member's lives. The concrete short-term benefits are typically what prompts people to engage and without sufficient short-term value it can be hard to sustain their participation for long enough to show them the real power and value that can be obtained. Additionally, communities

Employee Objectives Addressed by Internal Communities



External Communities Deliver a Range of Customer Objectives



Percent of Communities that Frequently Empower Members



“

For many people who are stretched thin on time, resources, or access, communities are one of the few ways to find these opportunities and they can have a transformative impact on their member's lives.

”

that focus too much on short-term value limit their potential by assuming the primary objective and value of a community is in the content exchanged.

The biggest impact communities can have on individuals is to empower them by

connecting them to others. Empowerment is the act of giving individuals the self-confidence to act, pursue their interests, and advocate for their beliefs. Members are empowered when others notice them, give them attention, respond to them positively, acknowledge their challenges, and celebrate their contributions. That validation encourages individuals to voice their concerns or contribute their perspectives. It helps people feel whole, valid, and valued. The more confident people become, the more they contribute to creating a virtuous cycle of engagement and rewards. In its ultimate expression, empowerment is seen by an individual's willingness to lead and when leadership is distributed, it unleashes potential and value for everyone in the community.

PRACTITIONER PERSPECTIVE

Ashleigh Brookshaw, ASSP

“ Online Communities regardless of business use case or target audience - are growing in importance because of their unique and iterative ability to drive culture change behavior while aligning with organizational priorities. An example would be leveraging functionality to address a business need - like using groups to do committee work.

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CLICK TO HEAR ASHLEIGH

Community Management

Digital Transformation Requires Community Management

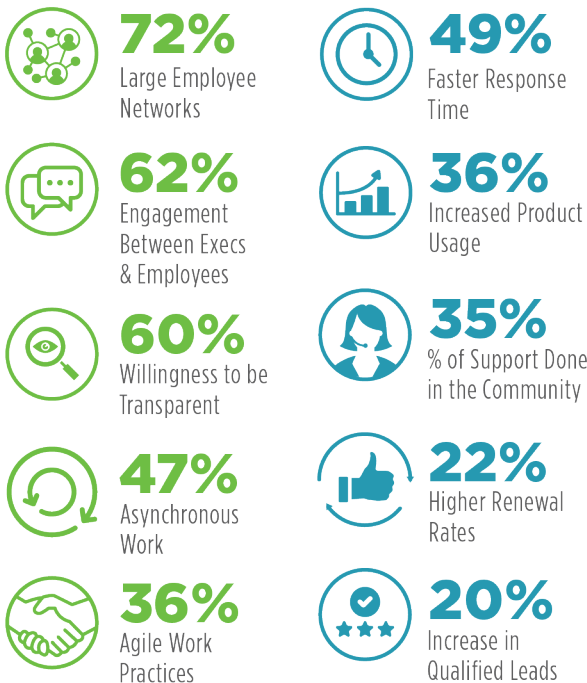
The best communities have environments that make new behaviors easy and rewarded – and accelerate behavior change by delivering value to the individual. Customers use External Communities because they get faster answers while also connecting with peers and getting ideas. To access that value requires that they ask more of their support questions in the community. When they spend time in the community to access faster answers, they are likely to find ideas about how to better use a product and develop connections to trusted peers. Those behaviors, in turn, make it more likely that individuals increase product use, are responsive to their peers, and are more likely to renew a service. That virtuous circle reinforces and rewards the contributions of an individual while producing unique value for the organization.

Employees who spend more of their time on activities supported by Internal Communities see even greater impact. While getting answers, connecting to peers, and finding ideas about how to accomplish their work, they are also increasing their professional network, more likely to engage with executives, working transparently and iteratively, and often demonstrating how to work asynchronously. This new behavior is not necessarily explicit or intentional, but done in the

process of getting information faster. As individuals participate with new behaviors they are rewarded for them and start to recognize the value on their own – without having to be told. While working in new ways in the context of their own work, they don't ever explicitly 'learn' to work differently – they do it organically because it benefits them. This organic process shortcuts any objections or resistance because it is never imposed. Instead new behaviors are discovered and pursued in order to increase individual benefits.

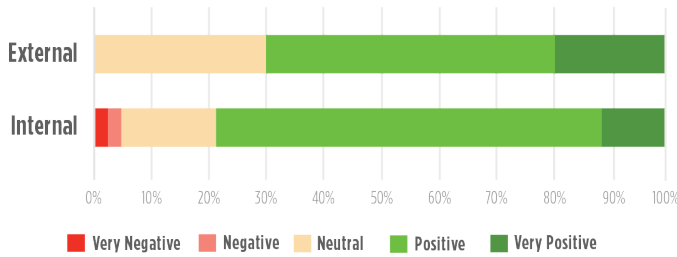
It is no surprise that these positive feedback loops increase as more people discover the impact of a community and start to change their behavior to increase its value to them. As communities mature, 80% of community programs report that communities are very or extremely effective at changing behaviors and with them, culture.

Top 5 Behavior Changes Impacted by Communities



■ Internal Average ■ External Average

Communities Are Contributing Positively to Culture and Brand Sentiment



Community teams, by understanding how to orchestrate this positive feedback loop for individuals, have unlocked the key to incremental and sustainable culture change – and with a lightness that makes the process pleasant and sustainable.

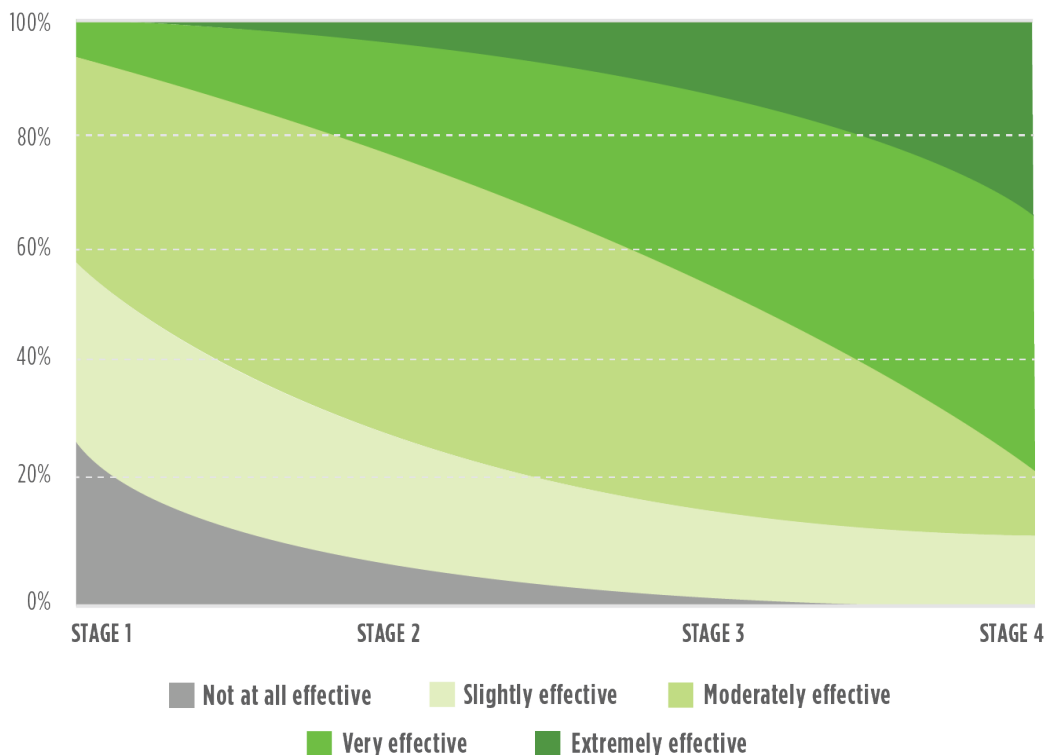


Community teams, by understanding how to orchestrate this positive feedback loop for individuals, have unlocked the key to incremental and sustainable culture change – and with a lightness that makes the process pleasant and sustainable.

The benefits of changing behavior culminates in a community’s impact on internal culture and external brand sentiment. All communities see an overwhelmingly positive impact on sentiment. For External Communities they contribute no negative impact on the brand and for Internal Communities the vast majority contribute positive impact.

Community-inspired change is effective, sustainable, and valuable, but it doesn’t come for free with community technology platforms. It requires thoughtful orchestration, investment, and a

Community Effectiveness in Changing Behaviors and Culture



willingness for it to grow and mature into its potential. And while not every executive stakeholder is going to have the patience and context to employ a community-centric approach, they are likely to find that there is no better way to successfully manage change. A community will only change an organization if it's easy, valuable, and socially rewarded. Distributing agency and making community the hero of the change is the best way to ensure it happens.

PRACTITIONER PERSPECTIVE

Marjorie Anderson, PMI



“ We have a very large community and we were seeing the new user count go up. And then it started to go down. I always put a disclaimer in my monthly reports around summertime: “Hey, you’re going to see these numbers go down.” But it wasn’t that time of the year. So we were taking a slight dip in new users and my boss at the time, goes, “Marjorie, are you concerned that the new users number is going down?” and said, “No, look at the engagement numbers, look at the number of people who are returning to the site, it’s going up. Look at the number of people who are sharing content and messaging with one another. Those numbers are going up.”

The new user count number doesn’t tell you much about the health of the community other than people are coming to it. These [engagement] numbers, this is the set of meaningful information that you need to see.

When I couple that with the other reporting pieces that come along with it, when we’re able to tell the story around what those numbers mean and explain it in such a way that executives and stakeholders can understand: you are creating a situation where people trust you. Where those members will continue to come back to you because of the value that you provide through this medium, this far outweighs the fact that, a hundred less people joined the community last month.

I try to challenge their thinking about what metrics are truly meaningful in a respectful way. If they still want to see the less important numbers? That’s fine. Totally their call. I advocate for the idea that just because [the new user] number jumps doesn’t mean that we’re providing value, it means that someone found the community and click the register button. What are they doing after they get there? Are we following that user journey? What story does that tell us?

If we can’t pull that information out, then maybe that’s not something we should be looking at, that’s not a valuable metric. I try to challenge the traditional thinking on what is meaningful.

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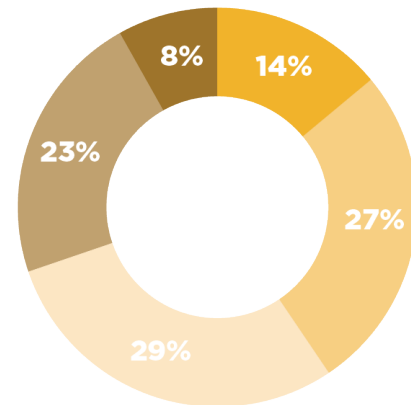
Content and Programs

Content and programs are the lifeblood of a successful community program. They are often seen as one collective entity, but they serve two different roles for communities. Content gives people a reason to visit (and return to) a community, while programs create opportunities for members to connect with one another. In previous editions of this research, we've noted that aligning your content and programs with your community strategy is critical to becoming a best-in-class community. Content and programs need to reflect the shared value of community, and a program plan tied more closely to strategy can generate the most valuable engagement behaviors.

Integrate content and programs into your strategic plan

Despite the importance of consistent content and programs in a community strategy, a staggering 60% of respondents report at best they have “an informal schedule” for content and programs in their community. In the four years since we last asked this question the needle has barely moved in this area when 59% of respondents reported the same level of content and program planning. While responsiveness to short-term member needs is important, we recommend being intentional about your content and program plan and connecting it to your community strategy and annual roadmap.

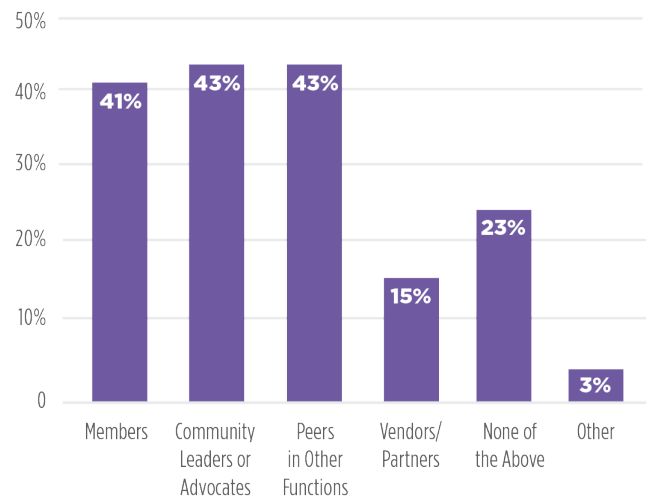
Approach to Content & Programs



- A formal plan that aligns with the community strategy and is integrated with other functional plans
- A formal plan that aligns with community strategy
- An informal schedule
- Some ad hoc initiatives
- No consistent approach

What Groups Produce or Facilitate Community Programs?

(Other than the Community Team)



Don't go it alone – deputize your members, advocates, and peers!

One of the most consistent responses in this annual research is that community managers need more resources. While we don't doubt that this is the case in general, we're enthused by their response to the challenge. They're enlisting others, both in and outside the organization, to help with their community programs. While we'd love to see this happening more broadly, leaning on members, advocates, and peers in your organization to assist in producing or facilitating community programs is a best practice that needs to become more widespread. The fact that nearly 25% of respondents report no activity in this area suggests we still have a long way to go before this is a standard approach for community practitioners.

New member onboarding programs stand out

For the last few years, we've talked about the importance of new member onboarding programs and it sounds like you've listened. Respondents report that this is their top community program, with nearly 60% including them in the mix. Newsletters, virtual discussions, and virtual workshops and training (not surprising based on the pandemic) are also relatively common in this year's sample. It's interesting to look back to the last time we asked this question (2017) and compare the results. We see no real increase in the prevalence of these programs

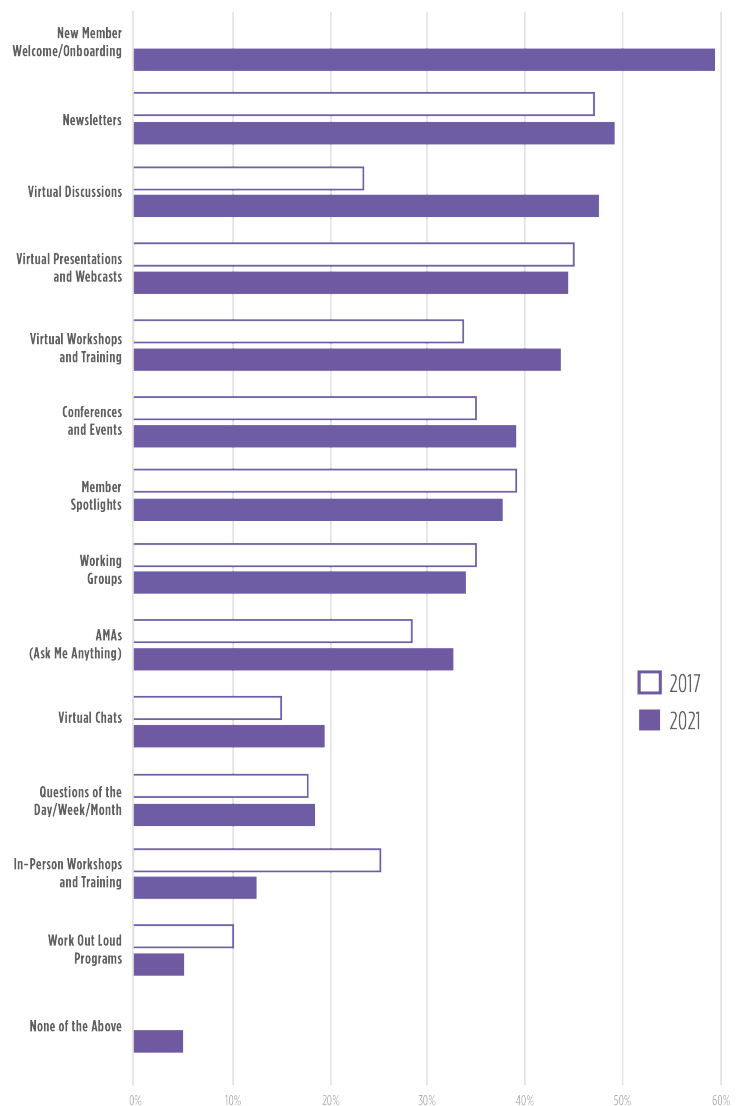
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Despite the importance of consistent content and programs in a community strategy, a staggering 60% of respondents report at best they have “an informal schedule” for content and programs in their community.

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What Types of Programs Does Your Team Produce for the Community?

2017 vs 2021



in the collected responses, which shouldn't be surprising given content and program planning clearly isn't a priority for the majority of respondents (see above). But it is surprising given community programs are the single best way to introduce members to one another, develop trust, and participate in high-value engagement behaviors. We recommend you review this list of common community programs and consider adding them to your plan if they're aligned with your overall strategy.

Note: We did not include "Member welcome/onboarding" in the 2017 research survey and therefore cannot report on a change over time.

PRACTITIONER PERSPECTIVE

Chris Detzel, Reltio



“ We know when customers engage with us this way, they get excited about all the ways we can help them - going deeper within the products and buying more. ”

Chris Detzel created a community webinar program covering product roadmaps, expert interviews, Ask Me Anything-style sessions, and new product launches. He even automated the registration and follow-up process.

Once a webinar is over, Chris creates even more opportunities for engagement by turning webinars into digestible videos, discussion threads, product Q&As, and product blogs. With each event, the company gets a new wealth of content and SEO opportunities that increase their reach and create value for their community.

By creating exciting and engaging community programming, Chris increases high-value customer engagement that leads to renewals and upsells.



[CLICK TO HEAR CHRIS](#)

Policies & Governance

Networked Governance Unleashes Value

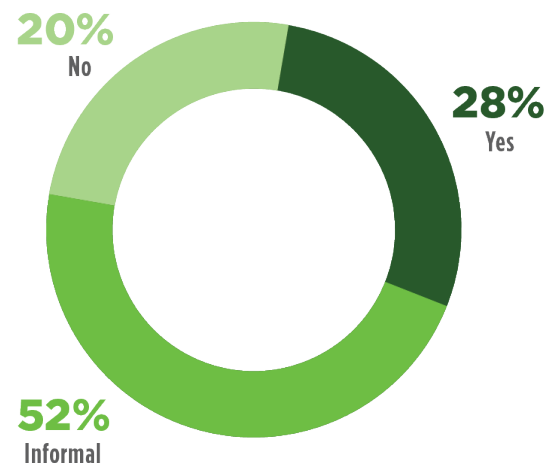
In order to thrive in 2021 organizations need to be experts at evolving and adapting – changing. This runs counter to the prevailing ideas of how companies start, grow, and scale. Whether it is the Gartner Hype Cycle or Bruce Tuckman’s popular model for forming, storming, norming, and performing, we think of organizational operations as getting to a point of relative stability, where processes, governance, and infrastructure are optimized and can sustain a group or organization for a significant period of time.

Organizational and market stability, if it ever existed, is gone. Our mental models, narratives, and management methodologies continue to be rooted in an industrial ‘boom, extract, bust’ dynamic. In an ever-changing environment, sequential processes act like a wrench in the spokes of a bike; trying to slow the market down to accommodate internal operating speeds while ignoring the other bikes streaming past.

Communities Transform Operating Models

Rigid hierarchies, detailed governance structures, and sequential work processes are archaic in comparison to the speed of networked markets. The only solution is to create a networked operating model where decision-making, leadership, and customer engagement is pushed to the edges, allowing individuals to address problems and opportunities when they see them and without heavy processes that inhibit collaboration. A networked operating model needs a networked management approach – something community teams have honed over the last few decades online and for generations before offline in activist movements from abolition to women’s suffrage, from the labor movement to the US civil rights movement. Managing networked, community-centric movements before the Internet was time intensive and incredibly hard – it was far slower than hierarchical models that streamlined the flow of information. Today, with almost immediate access to information, that same hierarchal system collapses. Online community managers have learned how to harness information immediacy while aligning

80% of Community Teams are Acting as Centers of Excellence - Only 28% are Explicitly Resourced as CoEs



communities around shared goals by managing culture and behavioral norms.

Community management is rapidly becoming the primary model of all management – and community teams are being asked to enable their organizations on top of managing specific community ecosystems. Only 28% of all community programs are explicitly resourced as Centers of Excellence but another 52% say they informally act as Centers of Excellence, helping enable community management throughout their organizations. As community teams become more mature and transform the communities over which they have direct responsibilities, they are much more likely to transform into explicit Centers of Excellence, with the biggest jump coming between Stage 3 and Stage 4.

“

Community management is rapidly becoming the primary model of all management – and community teams are being asked to enable their organizations on top of managing specific community ecosystems.

”

PRACTITIONER PERSPECTIVE

Keri Kersten, UKG

“

As communities become more prevalent across organizations, a Community Center of Excellence allows governance and expertise to scale across community programs. This creates a more cohesive strategy, aligning resources and community experience across the organization.

”



[CLICK TO HEAR KERI](#)

Tools

Based on this year's survey data, the state of community platforms is in flux. While it's difficult to tell if this is primarily due to the survey sample (a reminder from the Methodology section that respondents tend to come from The Community Roundtable's audience and may not reflect overall industry trends) or something else entirely (COVID-19?), the changes from 2020 are still fascinating. We'll consider whether we see this as a fundamental shift or just a temporary pause.

Migration Mania is Over... or is it?

Community migrations slowed over the last year. The percent of organizations reporting "no plans to migrate to a new platform" increased by 6% from 2020 to 2021, likely due in part to a 42% increase in the percent of organizations reporting that they "migrated to a new platform in the last 12 months." The wheels of change were already in motion at many organizations when COVID-19 hit and they stayed the course with their migrations. But organizations that had yet to begin a migration may have just hit the pause button. We noticed a 19% drop year over year in the percent of organizations who say they are "considering migrating to a new platform but have no set timeline." Similarly, organizations that are "planning to migrate to a new platform in the next 12 months" dropped by 33%. Based on the uncertainty that COVID-19 brought to many organizations we're not surprised to see this finding and expect interest in platform migrations to rebound as organizations settle into a new way of working post-pandemic.

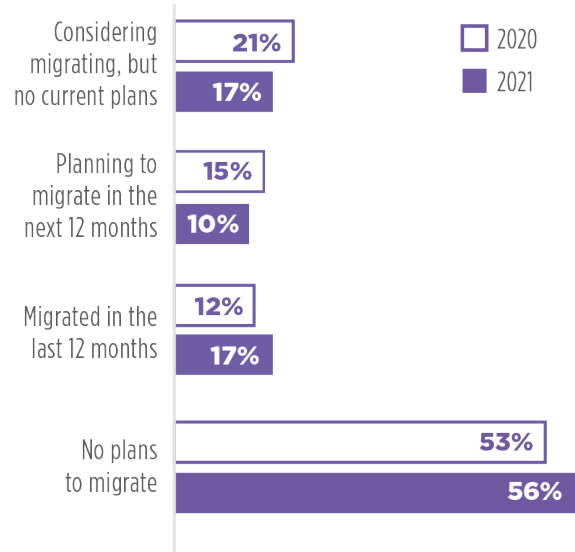
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It's been widely reported that COVID-19 has had an interesting impact on client/vendor relationships. If it was strong before the pandemic, it likely sustained itself or got stronger. If it was weak, it became weaker and might have even caused a crisis.

”

of communities as a core business system. They are no longer a pet project in the marketing or customer service department – communities are going mainstream. Further confirming this trend is the drop in responses to both “a distributed set of tools without one community home base”

Community Migration Status



Community Ecosystems Are Increasingly Becoming Operationalized

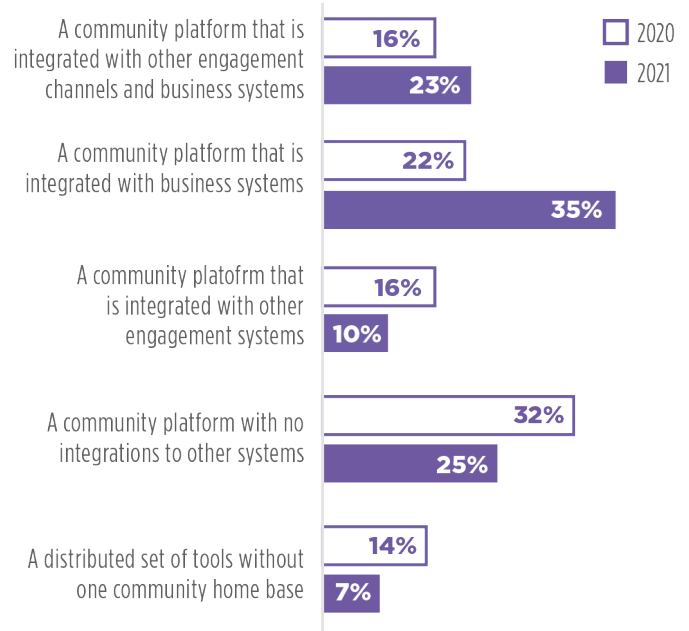
According to this year's data, community ecosystems matured dramatically over the past year. A full 58% of respondents report that their "community platform is integrated with business systems" up from just 38% in 2020, a 53% increase! This is a big shift and suggests organizations are coming around to the idea

(down 50%) and “a community platform with no integrations to other systems” (down 22%). We expect this trend to continue in the coming year as more and more community teams prove the value of their initiatives and provide a path to operationalize their ecosystem.

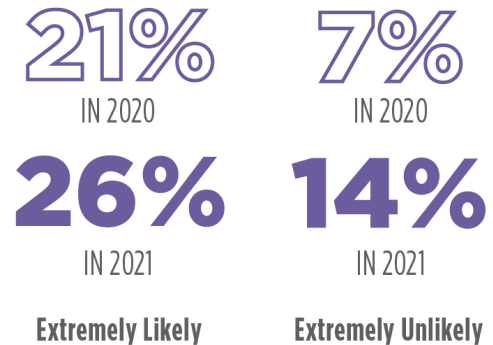
Customer Referrals: The Good, The Bad, and The Ugly

It’s been widely reported that COVID-19 has had an interesting impact on relationships. If they were strong before the pandemic, they likely sustained themselves. If they were weak, they became weaker and might have even caused a crisis. We see the same impact in this year’s data, specifically when we asked if respondents would “recommended their current community platform to a friend or colleague.” Those who responded it was “extremely likely” increased by 24% year over year (21% to 26%), while those who said it was “extremely unlikely” they’d recommend their current community platform increased by 100% (7% to 14% of respondents)! While we can’t say for certain that these changes were caused by COVID-19, a shift in the response profile, or something else entirely, it IS clear that community platform vendors may want to redouble their efforts to build stronger relationships with their existing clients.

Community Ecosystem Maturity



Customer Referrals at a Crossroads



PRACTITIONER PERSPECTIVE Lance Yoder, Cerner

“ Since we can no longer meet in person or interact in person, the value of being able to collaborate virtually [on our enterprise community tools] become more self evident. And when we have folks in the business that will generate on their own that say, “Hey being able to connect virtually, it eliminated this manual process for our team and it saved us 1,000 hours a year.” I mean, no one can argue with that. That’s the business calculating the ROI [of community tools] on their own. ”



[CLICK TO HEAR LANCE](#)

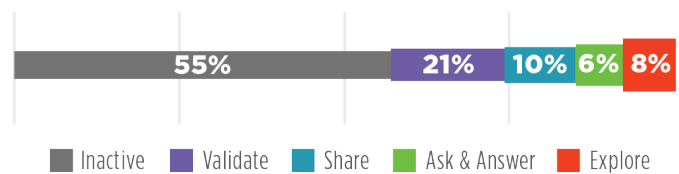
Metrics and Measurement

Community Business Models Are Established

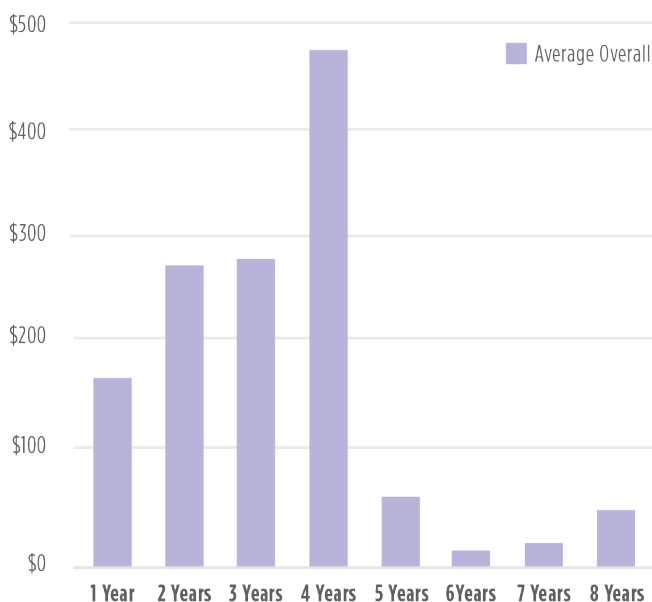
Communities generate value in ways that cannot always be explicitly designed for ahead of time, making them hard to understand in the context of existing organizational governance. Without translation, the immense benefits of community approaches cannot be pursued and managed within the decision-making hierarchies, investment cycles, measurement approaches, or cultural norms of most organizations. Organizations prefer predictability; communities generate benefits emergently.

While communities, by their nature, are unpredictable in the details of who interacts and how they do it, their growth and impact can be projected once dynamics and patterns emerge. By mapping the engagement behaviors exhibited in the community to the behaviors of organizational workflows, financial value can be estimated. For each community, different behaviors have different relevance – and each behavior has a different value. By understanding the value of and relevance of these behaviors to an organization, how frequently they are displayed, and how many times they reflect either a more *efficient* workflow, or replace a more *expensive* workflow, the organization can quantify the aggregate financial impact of a community.

Average Community Engagement Rates



Average Cost Per Member by Community Age



This research collects and normalizes the cost of communities by member and reports how those costs are allocated to develop successful communities. These benchmarks can inform and support budget projections. Understanding how budgets change and financial impact accrues over time allows organizations to plan, in time and resources, to achieve a desired impact.

Costs per member start around \$150/member on average as a community welcomes new members and experiments with what productively engages them. While communities tend to grow rapidly in the first few years, so do costs as community teams keep up with member growth and continue to refine what works. As new behaviors and growth rates

stabilize, community programs identify and implement programs, governance, and infrastructure that reinforces those behaviors. While infrastructure investments are expensive and cause an initial spike in cost per member, they result in a dramatic drop in costs over time. Cost per member varies significantly depending on the type of community, audience, and total projected community size, so the specific cost/member may change but the investment curve is likely to have a similar dynamic regardless of these factors.

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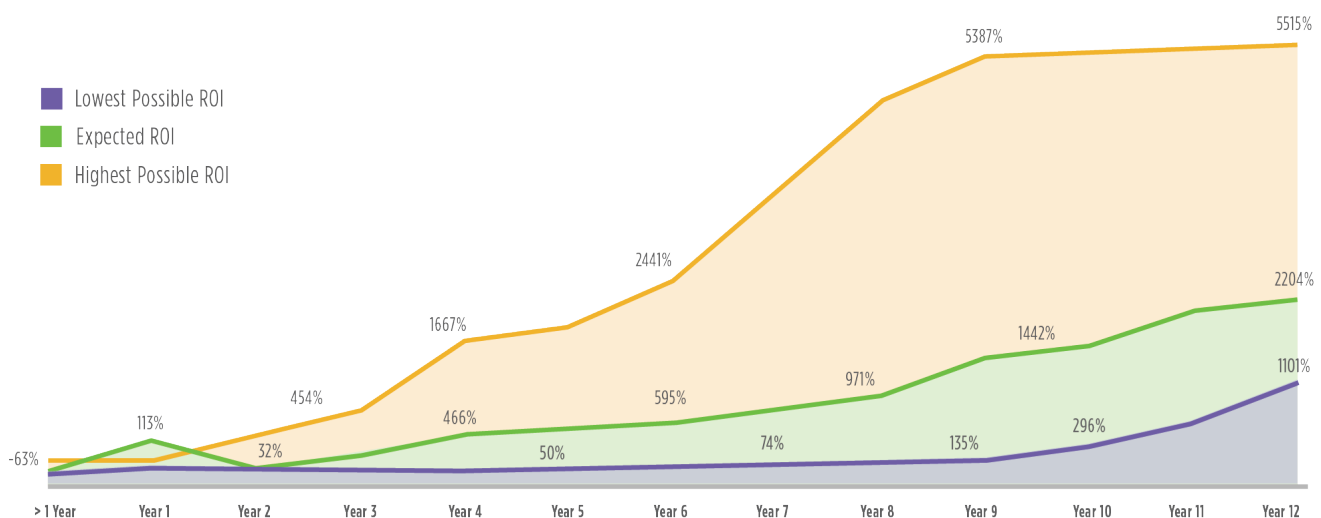
ROI does not need to perfectly capture all the value communities generate – it just needs to convince stakeholders that it is as good or better at solving a problem than an alternative approach.

”

This investment dynamic – growing costs followed by a steep decline, combined with the small size of early communities, results in a slowly growing ROI in the early years of a community. As new behaviors are normed and as member growth accelerates and infrastructure is enhanced, community ROI rises rapidly. Once mature, communities capture an increasing percentage of known expertise and value plateaus as the shared purpose of the community is met. When this happens, unless the community is re-energized with a new shared purpose, it transitions to a mature repository with less new content contributed. Value remains, but growth slows considerably. This curve is consistent over the years of this research and matches a similar observation in the value growth of innovation, which also exhibits this ‘S curve’ as innovation is adopted and normalized.

This year’s research illustrates the field of possibilities for community ROI; what is minimally and maximally possible based on the content submitted and searches conducted. The lowest value assumes that each contribution is used just once and the highest value assumes perfect re-use

Field of Possibilities, ROI by Community Age



based on how many successful/clicked-on searches occur. The re-use of content is highly variable based on the size and maturity of a community and the complexity of its content. This field of possible ROI reflects that variability and makes assumptions about average re-use to create an expected ROI that is more reflective of what is realistically possible for most communities.

ROI is important for organizations because it allows them to weigh investment options for addressing different opportunities. ROI does not need to perfectly capture all the value communities generate – it just needs to convince stakeholders that it is as good or better at solving a problem than an alternative approach. The logic, data, and assumptions that go into a community ROI calculation are as important as the number. ROI is used as a baseline justification for investing budget – it is not the business objective.

The business objectives driving investments in communities are more complex for most organizations. Technology is rapidly changing information, knowledge, customers, markets, work – everything that makes organizations successful – and outdated governance structures are constricting organizations' ability to keep up. Communities offer not just a streamlined way of sharing information but also a radically different way of governing how that information is used and by who, giving organizations a critical roadmap to change how they operate.

PRACTITIONER PERSPECTIVE

Georgina Donahue, Pragmatic Institute

“ We wanted to demonstrate the wonderful work the community team has been doing historically, bringing visibility to the community team by using the language and metrics that other teams are familiar with.

Our goals were to drive some attention to the community team (aka show off a little!) and build job security for the current headcount. We used a support-based ROI model - so, case deflection and we were able to show tremendous value. It is quite clearly more efficient and lower cost to handle “easy” or simple customer support questions in the community vs. with cases. We illustrated our value model as “Here is what it would cost the business to provide the current level of value, if the community disappeared” instead of “We can lower the cost of the current level of value”.

We also created a metric to say “If the community disappeared, here’s how many FTE’s in support it would take to replace us”.

This was a very good approach for us because it firmly achieved our goal. The community team is now *very* popular internally and is viewed as a total bargain.



What's next?

The next new normal is up to us.

As we wait to see what the next new normal will look like, it's instructive to reflect on the past. The pandemic brought unprecedented change to our work lives and as organizations now look to define the future of work, communities have an outsized role to play. For years, leaders had easy (and yes, vague) answers as to why funding, supporting, and championing community programs wasn't worth the investment. "Working online isn't productive." "Working virtually can't possibly replace face-to-face." "Collaboration and change can't be effective at a distance."

And yet... we proved them wrong. It's as if community managers have been preparing for this moment for the last twenty years. Guess who builds productive, empowering, and innovative solutions for organizations? Online community managers. Enthusiasm for community programs and community roles has never been higher, and it falls to us, the champions of community, to make sure this momentum isn't squandered.

Community management is the future (of all management).

We've been banging this particular drum for over 12 years, and now (thanks, COVID) people are listening, yet there are still challenges ahead of us.

One barrier to universal community acceptance is that in many organizations the discussions about innovation (or productivity, or culture) are separate from discussions about community approaches. Community managers know this needs to change. The corporate community (or intranet, or enterprise social network) isn't just a place for nice-to-have conversations or to read carefully polished messages from the CEO. A community can be the heart of any organization, a place where behavior change, and therefore innovation and culture change takes place naturally, organically, and productively.

Our research shows community programs cultivate new behaviors that streamline workflows, connect members around the world, improve sentiment, and change culture. They support broad communication and behaviors that apply to every individual and function across myriad use cases. Before COVID-19 most leaders did not understand or appreciate how communities can improve their organizations, nor were they compelled to explore.

But we are at an inflection point. The old "office" is gone, likely for good. As organizations shift back into in-person work environments, they are choosing to be deliberate about the organizations they create. Hybrid work is becoming the norm and there is no greater time for community leaders to step up to help build this future vision for their organizations.

Communities build purposeful, meaningful, and equitable organizations and now is their time.

Recommendations for Executive Stakeholders:

Research Finding	Recommended Action
Only 29% of all community programs have a funded roadmap	<input type="checkbox"/> Provide the resources to realize strategic goals, including adoption and use.
Less than 50% of all community programs can calculate community value.	<input type="checkbox"/> Invest in defining strategic and operational metrics.
In Stage 1 community programs, community management resources are only 19% of the total community budget.	<input type="checkbox"/> Approve budget for community team hires to close leadership, programming, and metrics gaps.

Recommendations for Community Leaders:

Research Finding	Recommended Action
Less than half of Stage Three community programs have a formal community leadership program.	<input type="checkbox"/> Define a community leadership program.
Most community programs, including 40% of Stage Four programs do not have integrations with engagement channels and business systems.	<input type="checkbox"/> Develop cross-functional platform integration requirements.
61% of all community programs do not have a community program roadmap.	<input type="checkbox"/> Maintain an updated community program roadmap.
67% of Stage Four community programs are explicitly resourced as a Center of Excellence.	<input type="checkbox"/> Articulate activities and time spent to coordinate, support, and create solutions for cross-functional peers.

How to Use this Research

The Community Roundtable has delivered groundbreaking research for over a decade. Our research explores communities and how to optimize them for engagement, inclusion, and innovation. Online community managers pioneered early digital communities and learned how to encourage and reward productive behaviors without the authority to mandate them. To succeed, community leaders use governance models that act like a trellis instead of a cage, empowering individuals and enabling their potential. These community governance models are now applied across industries, functions, and types of organizations, and, in many cases, community approaches are changing corporate governance.

Our research aims to help executives and community practitioners identify, strategically manage, and measure communities in their organizations. We do so by reporting current practices, operational benchmarks, and community value.

Use this research to:

- Validate and audit your approach
- Prioritize your resources
- Identify gaps & opportunities in your program
- Build a roadmap
- Justify budget requests
- Inform conversations with stakeholders
- Educate staff



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I would not have been able to launch our new community without TheCR Network.


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The Community Maturity Model™: Measuring Community Management Maturity



	1  Hierarchy	2  Emergent Community	3  Community	4  Networked
Strategy	Competitive	Reciprocal	Cooperative	Interdependent
Leadership	Directive	Engaged	Influential	Inspiring
Culture	Resistant	Contributive	Supportive	Collaborative
Community Management	Absent	Encouraging	Mentoring	Empowering
Content & Programming	Structured	Responsive	Emergent	Co-created
Policies & Governance	Rigid	Restrictive	Flexible	Inclusive
Tools	Ad hoc	Defined	Integrated	Adaptive
Metrics & Measurement	Transactional	Experiential	Behavioral	Strategic

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Community management has been an implicit responsibility of leadership for as long as humans have cooperated to govern themselves. Communities have always been hard to measure because of their diversity, complexity, and emergent nature. Online, however, the dynamics of community came into focus and allowed us to understand how communities formed, developed, and evolved. This led to the more explicit role of the community manager and the discipline of community management.

The Community Maturity Model defines the eight competencies and four stages we feel contribute most to the development of a healthy, productive, and trusting community. This version of the Community Maturity Model was updated in 2019 to reflect a decade of research in the updated descriptions.

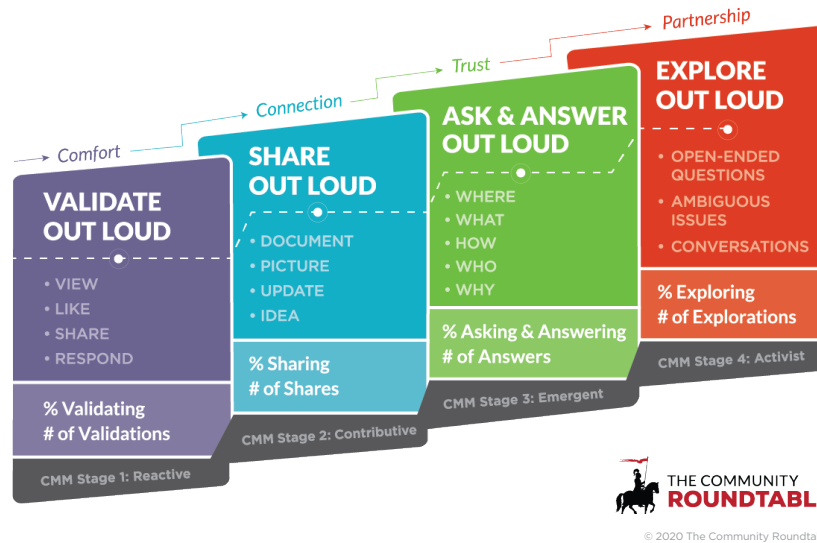
Our clients use the Community Maturity Model to:

- Train and educate stakeholders on the requirements of good community operations
- Assess their community approach
- Develop a roadmap and budget for their community program

More information about the Community Maturity Model can be found here:

<http://the.cr/community-maturity-model>

The Community Engagement Framework™: Measuring Engagement and Value



The Community Roundtable’s mission is to advance the business of community.

Throughout our history, we have focused on measuring the impact of community leadership, which we can see through engagement. Over the years, it’s become clear that organizations do not really understand the dynamics of engagement, how to deconstruct and measure it, and how to tie engagement to business outcomes and value.

This why we developed the Community Engagement Framework. It helps to:

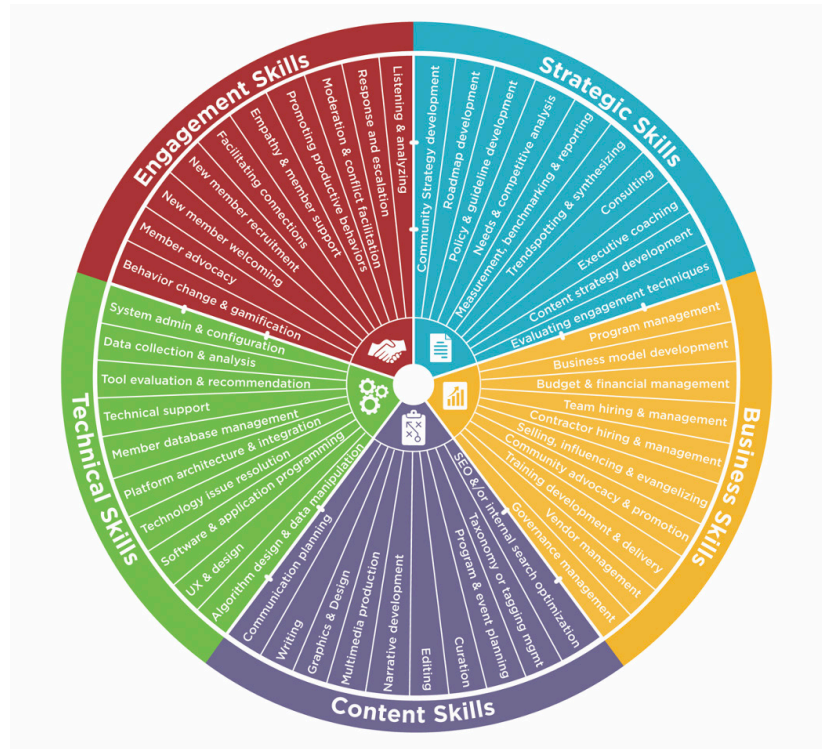
- Deconstruct and categorize the range of engagement behaviors
- Connect ideal engagement objectives based on business objectives
- Link behaviors with qualitative outcomes: comfort, connect, trust, and partnership
- Identify how to measure the depth and breadth of engagement types
- Translate engagement to value and calculate ROI

Using this framework to measure engagement and track how it changes over time allows organizations to see how trust is changing in their organizations and markets. Are people more or less likely to ask questions and explore, requiring trust in the social environment?

This framework concisely articulates what we’ve learned working with hundreds of clients. You can download a high res version of this framework here:

<https://the.cr/engagementframework>

The Community Skills Framework™: Measuring Community Skills and Gaps



The Community Skills Framework™ includes five skill families with ten skills in each family, prioritized based on our extensive community management research.

The five families in the Skills Framework frame the conversation with your stakeholders about the scope of your role, its priorities, what is reasonable for one person to do and where your strengths and weaknesses lie.

Community professionals at all levels find this self-evaluation and reflection incredibly helpful as they look to navigate their career and where they want to head next.

Learn more:

<http://the.cr/skills-framework>



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