



15+ TIPS & EXAMPLES FROM OUR ENGAGEMENT EXPERTS

MUST-HAVE INSIGHTS FOR YOUR

2021 ENGAGEMENT STRATEGY

What changed, what worked, & how to keep growing

WHEN 2020 BEGAN, NO ONE SUSPECTED WE WERE ABOUT TO ENTER THE YEAR OF THE PIVOT.

“Pivot” calls to mind the smooth, controlled motion of a dancer — when 2020 really had us all scrambling as fast as we could on shifting ground. With so many employees working from home, and so few face-to-face gatherings, the pandemic sparked a growing need for meaningful connections.

The word “pivot” doesn’t capture all the effort and resourcefulness shown by customer-focused professionals from every industry who met this challenge. They quickly adapted to the needs of members and customers and came up with innovative approaches to foster new relationships and expand existing connections. They found creative ways to connect with their members or customers, and they gave them a virtual space to learn from each other through online communities.

But navigating a virtual world and creating virtual engagement wasn’t easy for everyone, and for others, it’s still a learning curve. That’s why this year, we recognized a list of these leaders: the **2021 Engagement Experts**. The list is all about amplifying voices of leaders who will in turn help you build engagement – both *with* and *between* your members or customers.

We asked our Engagement Experts to share observations from the past year, as well as successful engagement strategies and tactics.

As you explore these success stories, we hope you find the inspiration you need to make 2021 the Year of Engagement at your organization.

LET’S MAKE 2021 THE YEAR OF ENGAGEMENT.

ENGAGEMENT EXPERT INSIGHTS IN 3 CHAPTERS

- 1** How Engagement Changed in 2020
- 2** What Worked: 7 Examples of Successful Engagement Initiatives
- 3** How to Keep Growing: Engagement Experts Share Their Tips

The Pandemic Made Online Community Building Even More Essential

With so many in-person events canceled, organizations turned to virtual experiences to stay in touch with members and customers.



“I’ve seen a huge shift in the attitude and mindset around engagement in a big way in 2020. Navigating a global pandemic which required a shift to working from home and quarantine, people had a strong desire to stay and feel connected to other people. Communities have empowered and enabled people to build connections.”

—Kristi Faltorusso

Vice President of Customer Success,
Intellishift

“As people had to quickly shift much of their content and programming to online spaces, more people have been looking at and experimenting with how to create more engaging online spaces and virtual gatherings. I have seen more exploration into tools and the structure of online events as well as trying to understand how all of this affects member engagement.”

—Kelly Schott

Lead Community Manager,
The Community Roundtable

Community Engagement Increased, and Virtual Events Saw Strong Attendance



“Our discussions went up 50% at the height of the pandemic. Members needed the connection that only our community could provide.”

—Brandon Vogel

Social Media Strategist, New York State Bar Association



“Because everything has been forced online due to the pandemic, we have seen exponential growth in the community. We’ve seen a 112% growth in total discussion posts and a 28% growth in active users in 2020 over 2019.

We saw about a 20% increase in community engagement/networking events in 2020 over 2019, and the average number of events attended per member increased by 200% over 2019. These types of events were small, often specific to a local geography, that allowed our members to stay connected even though they couldn’t be together in person. The follow-up engagement in the community speaks for itself.”

—Katie Cammer

Senior Manager, Growth and Expansion, Healthcare Businesswomen’s Association

Engagement Earns Renewed Appreciation From the Business Side

Professionals working in online community building have long understood that virtual engagement – or lack thereof – affects how an organization grows. As the pandemic limited in-person communication, many business leaders gained a fuller appreciation for this too.



“Virtual engagement is no longer optional but critical to sustained organizational culture and business success. Businesses are learning they need to pivot and/or implement online community and virtual engagement to stay relevant or better serve their customers.”

—Ashleigh Brookshaw, M.A

Manager, Community Engagement, American Society of Safety Professionals and the Founder and CINO of C2M Digital, LLC.

“There is so much more excitement and understanding for community since the pandemic. Community folks are recognized for a firm connection between our work and business outcomes.”

—Georgina Donahue

Director of Community, Pragmatic Institute



Community Professionals Rethink Their Engagement Approach

As the dramatic events of 2020 changed the needs of members and customers, professionals reevaluated their fundamental approach to engagement. Even a subtle shift in mindset can inform engagement strategy and tactics.



Less Transactional, and More Centered on Lasting Relationships

“Engagement has become less about ‘what can we get people to do to keep coming back’ and more about ‘what’s the value we can add to create a lasting relationship with our members.’ It’s less transactional which, in my mind, is definitely a step in the right direction.”

—**Marjorie Anderson**
Product Manager, Digital Communities,
Project Management Institute

Focusing on Empathy, Efficiency, and Effectiveness

“This year, Genesys has been focusing on providing our customers with tools and resources that are built and managed with Empathy, Efficiency, and provide maximum Effectiveness. These pillars of success drive our engagement model and challenge my team to rethink what the community can provide and how can we provide it.”

—**Matt Lawson**
Manager, Online Communities,
Genesys Telecommunications Laboratories, Inc.



Engagement Experts Share Their Favorite Success Stories

Let's talk about everyone's favorite part: Engagement tactics that worked. Our Experts shared activities that succeeded, both within their online communities and as part of their overall engagement strategy.



1

Want Increased Participation? Choose an Activity That's Super Easy

“So far our single most successful engagement activity has been the ‘Write a Happy Story’ contest we held over the Thanksgiving holiday. It had been a long, hard year for everyone, and we needed all needed a little pick-me-up. The challenge was to write a happy anesthesiology story in five words or less, and the winner (drawn at random) received some ASA swag. It was our best-performing community thread for the month! What’s great about this is that it’s quick, anyone can participate, and it applies to virtually any interest or group.”

— **Emily Cowan** | Online Communities and Social Channels Manager, American Society of Anesthesiologists

2

For a Personal Touch That Members Appreciate, Pick Up the Phone

“Our most successful engagement tactic? New member welcome calls, by a long shot. Twice a month we hold small, informal calls to get to know new members, give them a personal tour of the community space, and help them to meet some new friends right off the bat.”

— **Georgina Donahue**

Director of Community, Pragmatic Institute

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“All too often, an email can get passed over, and a broadcast ignored because they seem impersonal. Through many webinars, conferences (including Super Forum), and chat boards, I confirmed that the personal touch needed to continue in the onboarding series. I call every new domestic member and welcome

them to ASNT as part of the concierge program. The program informs our new members how to review their information, tells them of special programs based upon their career path, and introduces them to possible volunteer opportunities.

When I talk to our new members on the phone, it allows them the opportunity to ask questions that they may have otherwise left unanswered. Getting to know who our most recent members are – and having them say how nice it is to hear from someone – leads to more engaged members.”

— **Patricia White**

Membership Specialist, American Society for Nondestructive Testing



3

An Informal Approach Encourages Valuable Chat Interaction

“Our community champion ‘show & tell’ meetings represent the most successful engagement tactic we have. These are calls where community champions get together and present their learnings or interesting work they’ve been focusing on to the broader community. The true value happens in the chat and interactions that members obtain in an informal virtual event setting.”

— **Aslan Noghre-Kar**
VP, Enterprise Community, Change Healthcare

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“We actually tried a new type of programming at the end of 2020 that came out of some success that we had at our annual conference in October. In order to be



more accessible for members in other time zones, we specifically scheduled many of our conference sessions as pre-recorded sessions, where we would record the presentation ahead of time and, at the time of the live session, we would play the recording and open up space to chat. Sometimes the facilitators would be able to attend and talk with everyone alongside the video being played. We got overwhelming good feedback from that format, including that people loved being able to engage while the video was playing (and that feedback came from both speakers and attendees).

Because of that success, we launch a **“Watch Party”** program where we would replay calls as a part of our community programming. Again, members responded very positively and loved being able to catch up a call they missed or just wanted to experience again. We are looking forward to continuing this program moving forward to see what else we can build from it.”

— **Kelly Schott**
Lead Community Manager, The Community Roundtable

4

Drive Awareness and New Business Deals with Customer Awards

“We did a digital awards program that was incredibly successful from both a customer, company, and prospect perspective. We tiered our awards into an ‘Inspire, Explain, and Do’ campaign that allowed others to engage in the journey in a meaningful way.

- **Inspire:** Interviewed the winner’s boss to publicly celebrate them on social media
- **Explain:** A short 5-10 min video interview with winner discussing why they won the award
- **Do:** A webinar diving into the how and what the winner did to achieve success

We celebrated 17 customers in 3 categories across 4 lines of business. The results were incredible, from

engagement, to customer visibility, to opportunities. We saw customers getting celebrated and awarded internally by their organizations, we saw new deals (net new, upsells, cross-sells) come in, and most importantly, we were able to drive awareness from social to our website without paid advertising by demonstrating that helping sells.”

— **Ari Hoffman**
Director of Customer Advocacy, Coveo



5

Create a Virtual Roundtable to Increase Community Activity

“We developed a virtual roundtable series to support our members during the pandemic. We had over 1,200 unique registrations over the past year. We listened to the community to create topics and questions and continued the conversation in our discussion forums. We saw community activity increase by 62% from the previous year.”



— **Tirza Austin**
Manager, Online Community,
American Society of Civil Engineers

6

Organize “Ask Me Anything” (AMA) Sessions in Your Online Community

“At the association I work for, with the community team that I lead, we instituted AMA sessions with business leads in the organization to help the community feel more connected to us. They’re a hit. Community members attend each month to learn more about our initiatives and to ask questions to product owners/managers about what’s next. It also draws out ideas and suggestions from the community on how we can improve or make something better. It’s really helped the community feel more connected to the association they pay dues to and helps us innovate on their behalf.”

— **Marjorie Anderson**
Product Manager, Digital Communities,
Project Management Institute

Looking for more online community engagement tactics? Check out our Guide to Online Community Engagement.

DOWNLOAD IT HERE →

7

Don't Overthink the Solution — Embrace What You Already Know

“Everyone in the world was making a rush to figure out how to adapt to COVID so that work and life could continue. Communities already had the upper hand in this regard. So what we needed to do was not think about new and niche engagement methods that work, but rather double down on the day-to-day activities that already make us a great place for this situation so that our channels can remain open, welcoming, and active for engagement, which the Higher Logic platform’s automation rules are great for.”

— **Matt Lawson**

Manager, Online Communities, Genesys Telecommunications Laboratories, Inc.

Tips For Getting Buy-In From Your Organization's Leadership

Online communities connecting members or customers with each other helped many organizations stay top-of-mind this past year. If you want to make this year the Year of Engagement, but you're trying to convince others, these tips will help you make a clear and compelling case for building an engagement strategy around an online community.

Link Your Efforts to Your Organization's Top Objectives

"It's all about mapping what you're doing to the high-level objectives of the business and participate in the success of those initiatives. Community can no longer be a silo, it has to be part of the solution at the highest of levels."

— **Brian Oblinger**

Independent Consultant and Podcast Co-Host at In Before the Lock Podcast



"In general, I recommend aligning the goals of the community with an organizational imperative. It sounds obvious, but we still see a lot of communities that aren't directly tied back to a business goal... and that can make it hard to prove ongoing business value."

— **Jim Storer**

Co-Founder, The Community Roundtable

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"It's all about that Venn diagram between member needs and organizational value. Find the sweet spot!"

— **Georgina Donahue**

Director of Community, Pragmatic Institute

Make Your Case with Data, Data, and More Data

“Get the data! And that is two-fold. The first part is to define success for your community. Talk to stakeholders, talk to executives, talk to members, and see what people are looking to get out of the community program. Determine what metrics you can pull and start collecting those that match what will help you measure success.

The second part is to find data or benchmarks to compare to. If you cannot find any industry reports or best practices, benchmark against yourself. Show how much the community has grown or produced over time and create a projection moving forward to show to stakeholders. Lastly, remember that each audience may need different metrics to see that value, so one dashboard may not fit all. Just make sure you are measuring what you know is important, and then create the narrative with that information.”

— **Kelly Schott** | Lead Community Manager, The Community Roundtable

“To prove value, you need to show that your members are benefiting. How do you do that? How do you stay relevant? You listen to what your members and customers are saying and asking for. If you’ve seen Hamilton, you know the line that fits this thought - ‘Smile more. Talk less.’ The initiatives have to come from the people that will benefit most from them. It is my job to help implement it. I am a big data person, so I always come to the table with statistics to prove a new initiative’s value.”

— **Patricia White** | Membership Specialist, American Society for Nondestructive Testing

HOW TO KEEP GROWING:

“Survey, survey, survey. Demonstrating value is easy, once you have testimonials and data to back up your claims.”

— **Nick Berry** | Digital Marketing and Publishing Manager, CPA Australia



“You have to provide data around impact. If you have a community that has been working cross-functionally with other parts of the business, show the impact of that collaboration on progress toward business goals. If you’re looking to pitch a new community initiative, again, show the business value of that initiative.”

— **Marjorie Anderson**
Product Manager, Digital Communities, Project Management Institute

Emphasize Community Engagement's Role in the Customer Experience

“Focus on the value you're driving at every aspect of the customer journey you're currently planning to impact with community. A positive experience in the community will impact customer satisfaction. We focus on impact on NPS as well as CSAT / deflection of support as key values to the business.”

— **Aslan Noghre-Kar** | VP, Enterprise Community, Change Healthcare



“Getting buy-in depends on which business unit you are talking to. For customers success, I would say, when customers engage in your community digitally, they renew at higher rates, they buy more, and they tell other people / their peers about your product – which is advocacy.

For an open community, search engine optimization (SEO) is huge. 90%+ of people in the world search Google for answers. If you are not on the first page of Google, when one of your customers have a question about your product, then you lose.”

— **Christopher Detzel** | Community Program Manager, Reltio

“The community isn't another engagement tool for your customers, it is the engagement hub for all activity. It's not just a place to deflect support tickets, it's the hub for your academy, your onboarding, your networking, your advocacy. It's the central operating plan for your entire customer experience to revolve around. There has to be a reason for your customers to come back, to engage, to be inspired.”

— **Ari Hoffman**

Director of Customer Advocacy, Coveo

THE ENGAGEMENT EFFECT

We hope the advice from these Engagement Experts helps you develop more engagement programs at your organization. Deeper, more consistent, personalized engagement with your members or customers is the way to success. And it's not just a one-to-one engagement that's needed - it's a one-to-many experience. Build a community to bring your members or customers all together and see positive results across your entire business and the customer experience.

Meet the full list of
Engagement Experts →



Higher Logic's Engagement Platform combines online communities & effective communication tools, built on 10+ years of experience. Learn how we can help you engage your members or customers this year.

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LET'S CONNECT