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ADVOCACY: THE  
NEXT FRONTIER

THE ART OF  
FOSTERING UGC

“IS COMMUNITY-  
MARKETING?”

INTEGRATING  
COMMUNITY  
INTO PRODUCT  
DEVELOPMENT



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**Director of Digital Customer Success  
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Hello Everyone,

This is the first issue of our magazine under our new banner as the Customer Leaders Institute. While our name has evolved, our core mission remains steadfast: to offer outstanding content, exclusive resources and support your professional growth. MyCLI will also continue to be your go-to spot online, boasting exclusive content, research and more with the same passionate team behind the scenes cheering on your success.

We are so proud of this edition, which genuinely highlights our redoubled commitment to a customer-centric mindset and the power of community. We hope you enjoy the feature with Nisha Baxi and all the fantastic articles in our Winter edition. If you'd like to submit an article for a future edition - [submissions for future editions are open now](#).

Thank you again for entrusting us and supporting our mission. We're always receptive to you and your feedback – feel free to reach out anytime at [info@mycli.co](mailto:info@mycli.co).

Now, delve into this edition! Enjoy!

Adrian Speyer  
VP Marketing & Community

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## Meet The CLI Team



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# Why ‘is community-marketing?’ the wrong question to ask

By: Michelle Goodall

Marketing and Public Relations have their professional membership associations globally for decades, e.g. PRCA, CIPR, CIM, AMA but community as a profession doesn't. What it does have are a large number of communities of practice, networks and meetups where best practice is shared support is generously amongst community professionals.

Big questions help all professions crystallise thinking about who they are, what they do and how they are perceived outside of their own communities and networks of practice.

One line of 'big existential questioning' I'm seeing and hearing more frequently in these communities and on social media is whether "Community is Marketing?", where it should sit in organisations and whether it should be considered part of the marketing function.

A McKinsey article in 2022 stated that community is the "big idea" in marketing for this decade. And if McKinsey highlighted this you can guarantee that businesses are increasingly looking to their

marketing and community teams to unlock value by building owned communities and leveraging existing ones to support growth.

Whilst community has long been the driving force of many growing businesses such as Dishoom, OLIO, Gymshark, HubSpot and Salesforce, it feels as though community for marketers has become more of a focus against the backdrop of rapid digital transformation, oversaturated digital marketing channels, toxic social media platforms and a rise in experts and creators looking to monetise their knowledge and skills.

And it's understandable that experienced community professionals may feel that marketers are edging in on their turf without fully understanding what community building and management is. And many marketers underestimate the knowledge, skills and effort that it takes to 'do' community well.

## So "is community-marketing?"

I've seen this question a few times

on X (I'm still struggling to not call it Twitter). It's a smart, provocative line of questioning. But let's be honest - a polarising social media platform with a limited character count will drive oversimplified answers.

It's like asking "is Public Relations/Corporate Communications/Account Management/Customer Service, Business Development, User Experience...or simply add in any business role or function 'Marketing'?"

And believe me, you really don't want to ask an experienced Public Relations professional if Communications or PR is Marketing. I've seen people come to blows over that question!

Responses to the "is community-marketing?" question will be invariably based on professional experience of organisational types, structures, sizes and how different teams are led, resourced and where they sit in an organisation.

For example, I'm thinking about how an experienced external consultant would answer it within the limited character count of X or



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Threads. If they've worked across multiple private and non-profit sectors and all sizes of organisations a likely answer is:

*"No, but the 2 should be very closely aligned to create as much organisational value as possible".*

Contrast this with someone who has only worked in-house for smaller, bootstrapped technology startups where it's everybody's job to do marketing, sales, account management, product testing, customer service etc.

*"Yes, community is marketing, sales, customer experience, client management and comms. It's fully integrated because there's only 10 of us doing everything to grow this business!".*

Then consider the view of a community manager in a large global enterprise with an established community team, many years of experience leading customer communities or developer relations, where community is defined, mature and marketing teams focus on 'upper funnel' demand generation and lead generation.

*"We're aligned but no, community isn't marketing. And I don't want marketing to get too closely involved, we're separate teams with separate goals and separate OKRs."*

Ultimately our individual experiences and even professional biases will inform our answers.

Slightly provocative questions in social media are great ways to beat the algorithm, guarantee

engagement and stir up strong opinions.

But some of the answers / comments perhaps hint at tensions between those who have more 'traditional' community backgrounds and those who view community building and management in different ways.

My take is that actually marketing, let me re-phrase that.. 'good marketing strategy' and community strategy/community building should be connected, regardless of the size, shape and flavour of your organisation and community.

### **I have seen tensions between community and marketing team members**

I've witnessed smart, ambitious

Marketing teams with a 'landgrab' culture. It's in their nature to seize upon 'the next big thing' to demonstrate that they are innovative marketing strategists.

But many view community with unrealistic expectations, a short-term 'campaign' mentality and extractive views on what they can 'take' from a community vs what needs to go into creating and maintaining a trusted, happy, balanced, community ecosystem.

Another source of tension for community managers is when their marketing team is poor at defining what marketing is. If this is the case, it's likely that their day jobs are more focused on tactical, executional elements of marketing such as Promotion (advertising, performance marketing etc.) or they have never had formal marketing training.

These types of marketers don't work closely with strategic teams who research, plan, engage with and analyse a broader set of internal and external audiences and stakeholders. It's easy to see in this case why a community manager might feel that they need to draw some lines of defence and disassociate community from more promotional forms of marketing.

Other tensions I've witnessed understandably come from those who manage communities of circumstance, such as forums for people managing their lives with specific medical conditions. Trust

and psychological safety within these communities is absolutely *everything*. It's unsurprising that marketers would be unwelcome guests or stakeholders in these spaces.

### **But there is a flip side - there are many businesses and organisations where community and marketing work in harmony**

In many startup businesses, it's not unusual to have an operating model and a culture where EVERYONE works in marketing and sales and has to do a bit of everything.

There may be specialists who lead the marketing and sales strategy and operations. And there are communities of investors, customers, partners, prospects. Nobody questions if community is marketing OR a separate community strategy... the community 'bit' is just a good business strategy and a powerful lever for growth.

I've seen global, traditional business that have found success with community. They have clearly mapped out all their networks, groups and communities, some of which might fall under the Marketing Team, some under Customer Teams, some under Product, HR or Internal Comms. But there is alignment between the different teams and departments and clear governance, measurement and success metrics.

I've also worked with non profits and communities of circumstance. There have been marketing and comms teams who need to understand groupings of people much better to ensure that their messaging, content and communications are focused on what people living with a specific medical condition actually need and will value. You can see how the community team working closely with marketing created positive results.

### **“Empathy is a necessary step for truth and reconciliation” -Simon Baron Cohen**

It's no secret that I am a marketer. But I've always been a marketer with deep expertise in communications/PR and community strategy and community building.

I understand the dynamics of communities, networks, groups and I have been able to support many organisations to define their approach to creating or working with communities, groups and networks and aligning that to their business and growth strategies.

My approach as a consultant is to try to understand as much as I can about an organisation, it's department, teams, people and publics. In doing so, I can help my clients see a clear path for alignment for and doing great

things.

I get asked by community specialists about whether my advice is perhaps “too marketing focused”.

I'll ask them how they define marketing and why they feel there might be a separation between those who plan, build, curate and manage communities and people who 'do marketing'.

I've lectured and trained in marketing, communications and community for years and I always aim to be very clear with definitions when explaining concepts.

**And herein lies the crux of the problem. Many people who work in marketing can't define and explain succinctly what marketing is.**

**And many people who work in community can't define and succinctly explain what community is.**

And if you can't do that, then it's hard to understand, empathise, work well together and to create value.

## Creating clarity – defining marketing

like to use some simple, helpful, established marketing definitions and models to explain what it is so others can understand and empathise.

Here's one I particularly like from the Chartered Institute of Marketing (CIM):

**“Marketing is the management process responsible for identifying, anticipating and satisfying customer requirements profitably.”**

Marketing is a recognised management process with one of the biggest budgets in any organisation.

It is central to business performance because it seeks to deeply understand customers, competitors and markets and to get closer to customers and satisfy their needs. And those customer needs, competitors and markets are always adapting and evolving.

Another marketing model I draw upon to help people understand the breadth of marketing in an increasingly multichannel and digital world is the M3 framework.

It helps extend the 7Ps of marketing (Product, Place, Price,



Promotion, People, Process, Physical Evidence) for the digital age and blends digital and digital and classic marketing into one future-facing framework. When you go through the model with non marketers, they soon appreciate the complexities of marketing as a discipline. They quickly see that the promotional elements of marketing to prospective customers (advertising, sampling, events, influencer marketing etc) are only one piece of the pie....remember, marketing is a management process and not a set of promotional tactics. The M3 model highlights all the elements of a Marketing Strategy including:

### **Marketing Strategy**

– how you budget, resource, articulate and communicate your plan

### **Marketing Analysis**

- Your Market and Customer orientation – how you align to what your markets and customers need  
- Customer Insight – how you understand customer needs and behaviours through research and data  
- Brand and Value – the brand architecture, brand proposition, brand value and brand purpose

### **Marketing Planning**

- Segmentation and targeting to map, prioritise and meet your defined target audiences  
- Positioning – how you develop and convey your offer to different

target audience segments via personalised experiences

### **Marketing Execution**

- Integrated Marketing Communications – through all forms of marketing, advertising and PR channels and approaches – paid, owned and earned media  
- Distribution – Channel/partner management and marketplaces  
- Customer Experience – mapping and testing multichannel customer journeys to support target segments in achieving their goals  
- Data and Measurement – governance, policies and procedures to collect, analyse and use data to measure, support, analyse and optimise performance

When you understand what marketing is using these simple definitions and frameworks, perhaps you can see why I contend that community isn't marketing, but that mapping, understanding and building communities can and should support multiple areas of a modern marketing strategy.

**Whether that's supporting deep marketing insight and helping you create a better product or service that's more aligned to your customer / market needs, whether that's**

**creating a community that serves and support marketing communications to a specific set of stakeholders, such as channel partners or whether community is a core part of your brand proposition and brand value.**

**And if 'is community marketing?' is not the right question, then what should we ask?**

That's simple.

It's not a closed yes/no question. It's one that should allow for more than 280 characters in response.

It's not a closed yes/no question. It's one that should allow for more than 280 characters in response.

It's a question where we can all bring our experiences. It's a question that asks us to think about how we can best build something collectively. And isn't that what the best community professionals do after all?

**The question we need to ask is:**

**"How should marketing and community align to generate the most value for people who belong to the community and those who invest in the community?"**





**Author: Michelle Goodall**

Michelle is a community strategy, marketing and communications leader focused on community building, community led growth and community based marketing.

A recognized leading specialist, speaker, trainer and lecturer with 25 years+ experience in a mix of consultancy, agency and in-house roles.

Co-author of Community Based Marketing (CBM) Best Practice Guide and the 'mother' of The Periodic Table of Community Strategy. Michelle has also lectured in Community Strategy at Manchester Metropolitan University.

Michelle has worked with clients in multiple sectors, industries and countries building thriving communities and networks that deliver results for some of the most incredible brands and businesses including BBC, Dove, UPS, Guild, and more.

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# Together we create: The power of integrating community members into your product development

By: Jake McKee

“Nothing is going to be backwards compatible. Do you think the fans will mind?”

This was how the call started. I was talking to one of the product designers working on version 2.0 of the LEGO Mindstorm product. The first Mindstorms had been on the market for nearly 10 years and as technology products go, it was ancient. Bringing it up to current day tech offered a ton of opportunities for cool new functions and features... but there was no way to cost effectively make it backwards compatible. And with a global community of LEGO Mindstorms fans, some of whom had invested thousands of dollars in the product, yeah.... It was going to be a big deal.

A really big deal. Pitchforks and torches big deal.

At the time I was the Global Community Lead at LEGO and I knew I had to find a way to head off the angry mob. Hopefully even create some positivity for the launch.

Using an approach I now call Community Driven Product Development (CDPD), I invited

four LEGO fans to work with the product development team through much of the Mindstorms development journey. I don't mean we met with them few times to gather input. These four fans (and later 5 more) were actively engaged with the product team. And when we launched, the mob was quiet, instead just wanting to know more about the product and the experience of developing the product.

**“There was a trust that those fans, leaders in the community, had everyone's best interests in mind.”**

Community-Driven Product Development is a significant shift in how companies approach product creation and customer engagement. Unlike traditional research methodology, CDPD is an ongoing, collaborative means of ensuring Community Voice stays present as products and services are developed from the ground up. The most profound insights aren't found in traditional surveys and Voice of the Customer research. Don't get me wrong,

those efforts are absolutely worthwhile to do as part of your product development process. What's new here is adding Community Voice, the powerful combination of real-time customer feedback and emotional engagement shared directly with the product team by customers and community members who have unique, representative voices.

Beyond keeping angry customer mobs at bay, CDPD programs have several unique business benefits.

**Higher product quality and innovation:** A diverse group of participants engaging regularly with the product team leads to more innovative thinking and eliminates quality blind spots that any product team naturally has. The more eyes, the less surprises.

**Reduced risk:** Continuous user feedback minimizes the risk of launching a product that does not resonate with the target audience. Products that have had representative community voices weighing in from day one helps to know how to effectively communicate and market the

new product.

### **Product advocacy at**

**launch:** With an effectively executed CDPD program the moment you launch you have a fanatic group of product fans who are ready and willing to advocate and promote your product. Rather than taking weeks or months to build momentum, you have advocates who feel personally connected to the product they helped bring to life ready to promote (and perhaps defend) it.

CDPD is not just adhoc engagement with random community members. It's a strategically designed engagement program based on four key elements.

### **Focus on the right outcomes**

At its core, a Community Driven Product Development program is designed to deliver concrete business results for your product development journey. Understand why you're establishing this program and what you intend to accomplish by involving customers. Write it down, share it broadly, get the full team's buy-in. Potential outcomes could be net new ideation, reducing post-launch customer complaints, or avoiding quality issues that tend to surface only after a product is launched.

### **Find the right people**

It all begins here: selecting the participants to invite into your CDPD program. The objective is to construct a program that

revolves around diverse voices from your customer community who are representative of the larger community of customers. Diversity can and should include, demographics, community credibility, community leadership, personal capabilities, and alignment with core customer personas. Who are the people in your customer community who can speak for the larger community, bring their experience back into the community after the program ends, and work well with your product team? And how do you find these voices in both new and seasoned customers?

### **Figure out the right timing**

Not every phase in your product development journey requires extensive customer/community involvement. Not all phases are created equally within an overall CDPD program. You might bring in just two customers for feedback during the initial ideation phase, while you may invite 40 customers into the process as you gear up for the product launch. Sometimes you

need an ongoing daily communication and sometimes you just need a one-off feedback session. The key lies in discerning your how Community Voice can best impact and support your product development efforts.

### **Determine the right ask**

Merely engaging with program members isn't sufficient; you must be prepared to ask them to participate in meaningful program activities. Activities that are enjoyable to the participate and valuable for your organization. Everybody goes home happy. Creating a well-defined and planned set of activities, guidelines, and reporting tools ensures that your team is crystal clear on how to maintain the enthusiasm and engagement of program participants.

Now you know what a Community Driven Product Development program is. What is it **not**?

### **It's not a Customer Advisory Boards (CABs)**





Typically, CABs are in-person events where senior level customers come together to give feedback to the company, scheduled on a regular but not frequent basis, and are often as much about marketing new products as they are working collaboratively. These are often “arm’s length” events.

### **It's not Voice of the Customer (VOC) research**

VOC is a formal market research process meant to gain insights into customer sentiment and experience via traditional, statically valid research practices. Typically VOC reports come from a combination of surveys, web site data, customer interviews, and Net Promoter research.

### **It's not an Insight Community**

Insights communities use research tools like My-Take (which runs one I'm part of: LG Insiders Collective) to ask broadly selected customers for their input and opinions. These participants are incentivized to fill out surveys that can take anywhere from a couple minutes to more than 30 minutes. Tools like My-Take create a community-like platform

experience but have little direct connection to other members and/or the host company itself.

Notice anything about these three programs? Yep, they're all traditional research based, disconnected from the actual product team. This is not community building, and it's certainly not Community Driven Product Development. To be clear, that doesn't make the "bad". Those three programs can be \*critical\* for an organization. And often are.

But they miss two crucial needs: real-time collaboration between product teams and the people they are designing for and advocacy building throughout the entire process that ensures an enthusiastic launch on Day 1.

So where does the Community Professional fit in the CDPD methodology?

Good question! It might sound like CDPD removes the community team from the engagement, but far from it. Product Managers and product teams don't have the time (and often don't have the community skills you've built up

over the years) to manage the participants, run the activities, watch for red flags, and generally oversee the program. It's up to you as the community professional to drive this program from conception to buy-in to execution

CDPD is a unique way to move past dissociated traditional research and into collaborative product development that inherently yields long-term customer relationships and advocacy. I deeply believe that community engagement principles make every company better, and with Community Driven Product Development you can help make the products better too..



**Author: Jake McKee, Community Driven Product Development Expert**

Jake is one of the founders of the modern customer community movement. He led Apple's famed Global Support Communities and pioneered efforts at LEGO to engage its adult users. Jake currently runs Jake McKee Consulting, a boutique consulting practice helping organizations of all sizes design, execute, and grow communities & Community Driven Product Development programs.



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# Mastering Online Community Budgeting: The 40-30-20-10 Strategy

By: Todd Nilson

**Smart budgeting can unlock the hidden power of your online community.** It's more than numbers; it's the secret to turning vibrant ideas into lasting impact. Whether you're starting fresh or looking to elevate an existing community, this guide shows how strategic financial planning can positively impact your community's success.

Budgeting, often seen as a daunting task, is the backbone of any successful community program. A good budget plan helps you with strategically allocating resources to nurture and grow your online space.

Unfortunately, there's a noticeable gap in the number of resources specifically aimed at community professionals seeking to master this skill. Unlike traditional business roles, where budgeting resources are abundant, community professionals often find themselves navigating these waters with little or no guidance.

This scarcity of tailored budgeting advice means many of you have had to rely on informal networks or piecemeal information to shape your financial strategies.

Recognizing this, my goal here is to bridge this gap.

In this blog, we're not just focusing on the 'how' of budgeting but also the 'why'. Understanding the rationale behind each dollar spent will empower you to make informed decisions that align with both your community's immediate needs and long-term goals.

## Budgeting Fundamentals

The importance of a well-structured budget in online communities is clear and supported by data.

“According to the [State of Community Management 2017 report](#), communities with dedicated budgets are significantly more likely to have an approved community strategy (80% vs. 48%), an approved roadmap (47% vs. 15%), and a formal advocacy program (42% vs. 27%).”

Effective budgeting in community management can be transformative.

## The Cornerstones of Budgeting

Understanding the basics of budgeting involves forecasting

income and allocating expenses. In the context of an online community, this means balancing the costs of technology, content, and staff against potential revenue from sources like memberships, sponsorships, referrals, or renewals.

**1. Income Estimation:** Begin by estimating your community's income, both its direct and indirect financial benefits.

**2. Expense Allocation:** Allocate expenses across various areas, including platform licensing, staff salaries, content creation, and engagement efforts.

**3. Financial Goals:** Set clear financial objectives. Whether aiming for profit, sustainability, or growth, these goals will shape your budget.

**4. Flexibility:** Ensure your budget is flexible to adapt to the dynamic nature of online communities.

While estimating income and setting financial goals for an online community, it's important to recognize the inherent challenges. Direct revenue attribution is often not feasible for most communities,

making it essential to focus on their indirect contributions, such as:

- Enhancing customer loyalty
- Increasing engagement
- Providing peer-to-peer support
- Creating user-generated content
- Identifying new product or service ideas

These factors, though not *directly* attributable in revenue terms, are *correlative*, and therefore vital to your organization's overall health. So, when crafting financial goals, remember that balance is key. Aim to incorporate both tangible and intangible objectives, aligning them with the broader goals of your organization.

This approach, focusing on a broader set of value-driven goals, acknowledges the unique contributions of online communities and ensures that your budgeting strategy is both realistic and aligned with organizational priorities.

### Why It Matters for Online Communities

Effective budgeting in online communities supersedes mere number crunching. It's about understanding the value of engagement, the cost of innovation, and the importance of investing in the health and growth of the community. A well-planned budget ensures that the community has the resources to grow, engage its members, and thrive.

For a closer look into the fundamentals of budgeting, check out the bibliography at the end of this article, which includes a selection of books and online resources on business and financial planning.

### Introducing the 40-30-20-10 Rule

**Navigating the financial landscape of online community management can be pretty daunting. To reduce the sting of it, I'd like to introduce an adapted budgeting framework: call it the 40-30-20-10 Rule. This guideline offers a structured yet flexible approach to budget allocation, specifically tailored for online community programs.**

### Breaking Down the 40-30-20-10 Rule

#### 1. 40% - Core Operations:

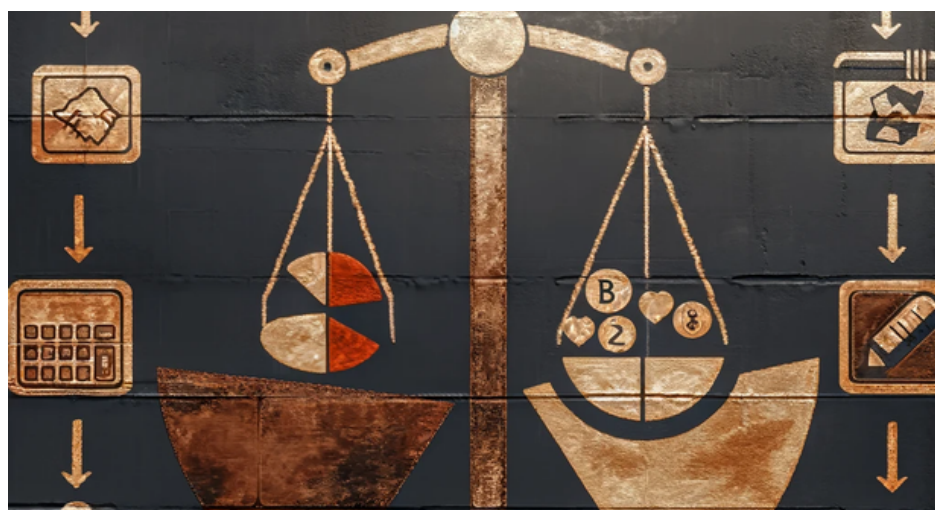
Allocate 40% of your budget to essential operational costs. This includes platform licensing, staff salaries, and basic technology needs. These are the fundamental elements that keep your community functional and accessible.

#### 2. 30% - Engagement and Content:

Dedicate 30% to engagement and content. This covers content creation, community events, and member engagement initiatives. While your staff may work to create content and events, this part of the budget includes things like expert graphic design, consultant services, webinar tools, software subscriptions, event swag, and more. Engagement and content is pivotal in keeping your community vibrant and active.

#### 3. 20% - Growth and Development:

Invest 20% in growth and development efforts. This can be channeled into



marketing, outreach, new feature development, or expansion plans. It's about strategically scaling your community and enhancing its offerings.

#### 4. 10% - Contingency and Innovation:

Set aside 10% for contingency and innovation. This is your buffer for unexpected expenses and your fund for exploring new ideas or technologies. It ensures your community remains resilient and forward-thinking.

#### The Flexibility of the 40-30-20-10 Rule

Rules are made to be broken, and so is this one. While the percentages provide a starting point, they are not set in stone. Each community is unique, with its own set of challenges and opportunities. Adjust these allocations based on your community's specific needs and goals. Use them as guide rails.

For instance, a newer community might invest more in growth and development, while an established community might allocate more funds towards engagement and content.

#### Practical Application - Budgeting in Action

Translating the 40-30-20-10 rule into real-world scenarios, I'd like to present two illustrative examples.

These "back of the napkin" models demonstrate how the rule can be adapted to different contexts - a Fortune 1000 B2B SaaS company launching a new online

community, and a mid-sized nonprofit seeking to enhance its established community.

Each example provides a high-level budget breakdown, showcasing how strategic allocation can align with specific organizational goals, from enhancing customer engagement and reducing support costs to fostering active volunteer participation and providing valuable data insights.

The goal of these examples is to provide a high-level budget breakdown for each scenario, illustrating how the 40-30-20-10 rule can be applied while aligning with their specific business and operational goals.

#### Example 1: Fortune 1000 B2B SaaS Company

*SplungeWare, a dynamic Fortune 1000 B2B SaaS company, is gearing up to launch an enterprise community platform. The goal is to foster customer upskilling, enhance product loyalty, and streamline support costs, paving the way for a vibrant, interactive online community.*

*Assume a hypothetical total budget of \$750,000 for the first year.*

#### 40% Core Operations (\$300,000):

- Platform Licensing: Purchasing a license for an enterprise-grade community platform.
- Platform Integration: Costs for integrating the community platform with LMS, CRM, and

ticketing systems.

- Community Manager Salary: Hiring a skilled community manager to oversee the community's launch and operations.

#### 30% Engagement and Content (\$225,000):

- Program and Content Development: Creating educational and upskilling content that aligns with the goal of increasing customer loyalty and product upgrades
- Initial Engagement Initiatives: Activities and programs to encourage initial user participation and engagement

#### 20% Growth and Development (\$150,000):

- Marketing and Promotion: Campaigns to attract users to the new community, emphasizing the benefits of upskilling and product knowledge.
- Cross-Promotion with Products: Integrating product promotions within the community to drive upgrades and new purchases.

#### 10% Contingency and Innovation (\$75,000):

- Reserve for Unexpected Costs: Buffer for unforeseen integration, consulting, or operational costs.
- Future Advocacy Program: Initial planning and resource allocation for a future customer advocacy program.

#### Example 2: Mid-sized Nonprofit with Established Community



*Save the Monchhichi is a dedicated mid-sized nonprofit, passionately working to keep social activists and volunteers deeply engaged with their cause. With an established online community on a turnkey platform, they are now focusing on expanding their reach and deepening member engagement through enhanced events and data-driven strategies.*

*Assume a hypothetical total budget of \$300,000 for the year.*

#### **40% Core Operations (\$120,000):**

- Platform Costs: License renewal for the turnkey community platform.
- Existing Staff Salary: Continuation of salary for the current community manager.

#### **30% Engagement and Content (\$90,000):**

- Community Events: Organizing online and potentially offline events to engage activists and volunteers.
- Content Focused on Activism and Volunteerism: Development of content that resonates with the community's cause and goals.

#### **20% Growth and Development (\$60,000):**

- Recruitment of a second Community Manager: Costs associated with hiring a second community manager specialized in events and data

analytics.

- Marketing for Volunteer Engagement: Targeted campaigns to attract and retain volunteers and activists.

#### **10% Contingency and Innovation (\$30,000):**

- Data Dashboard Development: Initial investment in developing a data dashboard for leadership to access community metrics.
- Emergency Fund: Reserve for unexpected costs or opportunities that arise.

These "back of the napkin" models offer a high-level view of how the 40-30-20-10 rule might be applied in different organizational contexts, aligning budget allocations with specific goals and aspirations of the organizations.

#### **Monitoring and Adjusting Your Budget**

View your community budget as a living document, inherently dynamic and evolving alongside your community. Integrating budget review into your regular community management activities ensures it reflects the current realities and needs of your community.

#### **Some Key Practices for Dynamic Budget Management**

- **Integration with Community Metrics:** Embed budget reviews into your analysis of community engagement and performance metrics. This approach helps correlate

financial decisions with their impact on the community.

- **Flexibility with Tools:** Use spreadsheets for their adaptability and ease of updating. They are a practical choice for tracking changes and planning future allocations.
- **Consistent Review Schedule:** Establish a regular schedule for budget reviews, aligning it with your overall community management cycle. Whether monthly or quarterly, this consistency is important for timely adjustments and informed decision-making.

By treating your budget as an adaptable tool, you can ensure it consistently aligns with the evolving needs and goals of your online community.

#### **Conclusion**

The 40-30-20-10 rule provides a structured yet adaptable framework to guide your budgeting process, balancing core operations, engagement and content, growth and development, and agile contingency planning. This rule is about aligning your financial strategy with your community's heartbeat – its goals, needs, and potential.

Remember, your budget is a living document, evolving as your community does. Regularly revisiting and adjusting your budget ensures that it remains relevant and effective in supporting the dynamic

landscape of your online community. The goal here is not to set rigid boundaries but to provide a flexible pathway that allows your community to thrive and grow.

Now, it's your turn. What techniques have you successfully employed when creating a budget for your community? How have you navigated the unique challenges and opportunities in your community's financial planning?



**Author: Todd Nilson, President and Community Strategist at Clocktower Advisors**

As a community strategist with over 25 years of consulting experience, Todd Nilson has honed his expertise in community-building, digital workplace transformations, and marketing strategy. His additional background in competitive intelligence research, game thinking, recruitment, employer branding, and virtual collaboration practices make him a well-rounded expert in his field.

Todd's leadership has been instrumental in delivering transformational technology workshops and projects for top-tier brands such as Activision, Facebook, SAP, The Truth Initiative, Steelcase, Schneider National, Sargento, Greenpeace, and Medtronic. His track record of success in community strategy makes him a sought-after consultant for businesses looking to enhance their digital presence and build strong communities around their brand.

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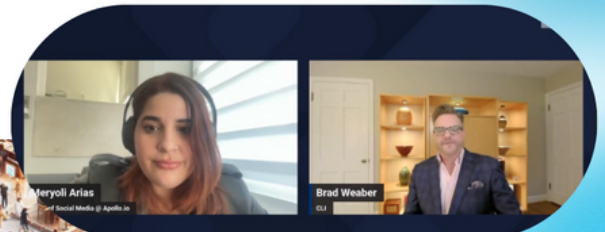
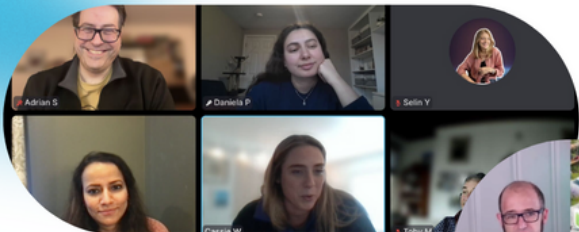
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# Lifecycle Advocacy: The next frontier of the B2B Ecosystem is here

By: Liz Richardson

“In today's rapidly changing global economy, many industries are experiencing more frequent and profound transformations than in the past, driven by advances in digital technology, globalization, and changing societal trends.”

## -ChatGPT

*It's time for some transformational change in B2B customer advocacy practice.*

In a [recent blog post](#) by FeverBee, Rich Millington describes the arrival of the Community Everywhere era, marked by the decline of defined community destinations and the emergence of a “fuzzy mesh” of community engagement that is no longer easily defined.

Over the last decade, we in the field of customer marketing and advocacy have seen B2B advocacy mature from one-size-fits-all novelty initiatives to a candy store

full of engagement programs for customers to choose from, such as advocate communities, CABs, executive engagement programs, review campaigns, and referral and reference programs.

This expansion of options has enticed customers to build deeper ties to brands through more personalized benefits and targeted opportunities. That's a good thing.

But as more and more B2B organizations adopt these programs and the mystery and freshness begins to fade, program managers find themselves playing an intense, repetitive round of engagement pickleball with the most enthusiastic 10% of their fan base.

Just like with the more mature community practice, we are feeling the limitations of advocacy destinations and branded programs.



While these programs continue to play an important role, it's time to think beyond advocacy programming to the era of **Advocacy Everywhere**.



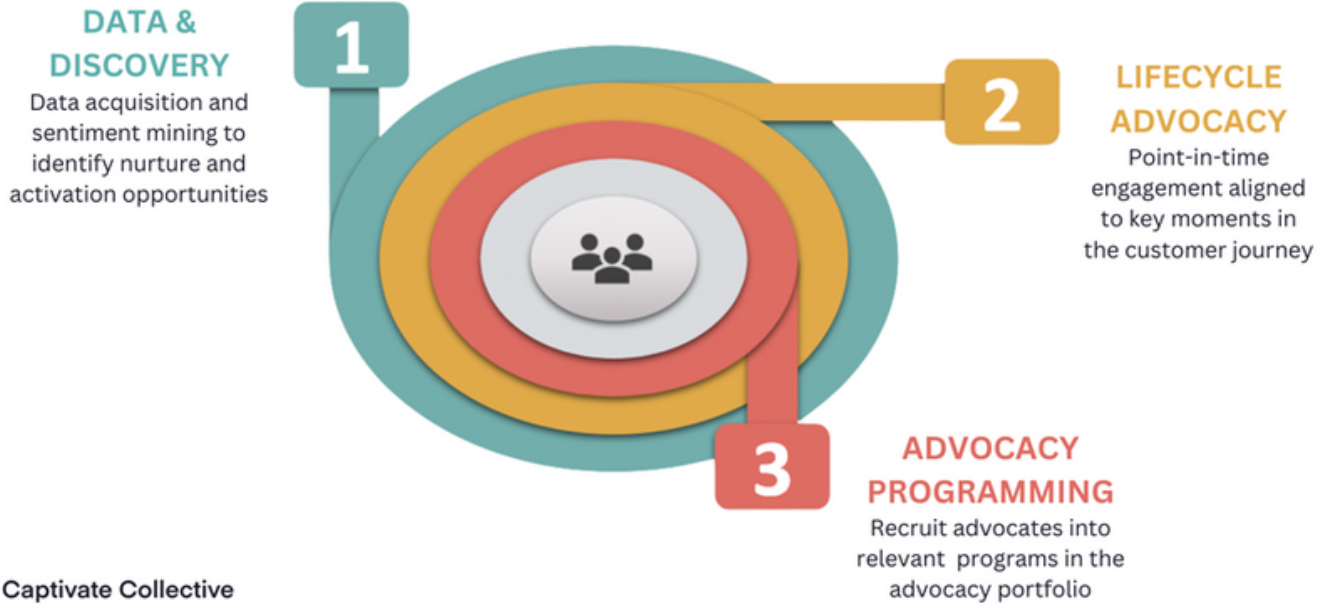
## The Next Layer of Advocacy Strategy

In 2021, [Deena Zenyk](#) and I introduced the concept of a new, additive approach to customer engagement and advocacy strategy we called Advocacy 2.0 or Ungated Advocacy (check out [this webinar with Base](#) or our [keynote for CustomerXCon](#)).

Through continued work with a diverse range of B2B brands, we've gotten the opportunity to further define our understanding of the advocacy ecosystem into three key layers.

In traditional advocacy practice (ie. the past 10 years), organizations have been heavily focused on Dara & Discovery and Advocacy Programming.

# CUSTOMER ADVOCACY ECOSYSTEM



- **Identification & Discovery** - Using data points collected through automation (or manually), the foundational layer of an advocacy practice is the ability to identify which customers are ideal collaborators and when is the opportune time to engage them. Beyond that, and equally important, is the practice of collecting key data points for further discovery of the customer's preferences, needs and intrinsic and extrinsic motivators to further personalize the value proposition of continued engagement. Currently, this is still a rather basic practice, with many organizations relying on NPS data or 1:1 advocate identification.
- **Advocacy Programming** - In the traditional B2B customer advocacy methodology to

date, identification and discovery would lead to inviting customers into the advocacy programming most aligned to their desires and collaboration potential. These programs afford the organization a valuable arena to nurture and grow the customer relationship and, when appropriate, activate customers through scalable campaigns or one-to-one "asks".

As advocacy programming becomes less novel, the limitations of this one-two approach are becoming more evident.

Advocacy programs primarily attract and serve a small percentage of highly engaged and successful clients. Programs are often membership-based and require time and attention

commitments, asking the member to interact in a separate destination outside their day-to-day online environments.

And maybe most importantly, these programs have their own advocate journey - sometimes including levels, badges, rewards and more - completely separate from their customer journey. The advocacy program experience is rarely in step with onboarding, adoption, renewal, and expansion goals, or how the customer is interacting with different teams across the organization.

How do we build an advocacy strategy that engages customers where they are - both in their day-to-day as an individual (whether online or in-person) and in their journey as a customer of your brand?

**Lifecycle advocacy is the third layer of the advocacy ecosystem and the intersection of Customer Advocacy and Customer Marketing practices.**

It allows you to **systematically build loyalty and advocacy in natural tandem to the customer journey**, meeting customers where they are rather than siloing their advocacy journey within the confines of membership-based programs.



**The Big Wins of Lifecycle Advocacy**

Why should lifecycle advocacy be the next iteration of the B2B advocacy practice?

- **Reach:** Advocacy programming does an amazing job engaging your customers - the small fraction of your most engaged customers that is. Advocacy professionals are constantly feeling the pressure of

finding more customers to advocate for their brand, but not every customer is interested in becoming a program member (or even the right fit). Embedding point-in-time nurture and activation allows you to engage a much broader segment of your customer base.

- **Scale:** Embedding and automating advocacy motions into the existing customer advocacy you generate with less manual effort. Advocacy professionals are constantly working to source customers. Lifecycle advocacy creates a constantly flowing stream of fresh advocate engagement.
- **Relevancy:** The era of the siloed experience is rapidly fading. As consumers, we

expect vendors to integrate into our experience, not the other way around. Lifecycle advocacy tears down the artificial wall between customer journey and customer advocacy, offering customers the right opportunity, in the right channel, at the right time.

**So Why Haven't More Organizations Implemented Lifecycle Advocacy?**

There's a reason why we haven't seen a great deal of adoption since we introduced the initial concepts now defined as lifecycle advocacy: it's hard.


Bringing advocacy engagement workflows to life requires a level of systems and team alignment that hasn't been demanded of customer marketing or advocacy functions before.

- **Cross-functional buy-in:** No one department owns the entirety of the customer journey, which means you'll have to pitch the vision and value of your work to cross-functional leaders and team members.
- **Cross-functional collaboration:** You won't be able to build in a vacuum - your ideas must be based on input from those who know your customers and their pain points best. You'll need to collaborate with stakeholders, such as sales, support, adoption, renewal, expansion, and product.
- **Cross-functional systems:** Perhaps the most difficult challenge we are facing as practitioners is building within and connecting to the processes and software already supporting your customer experience. Dedicated tools for Advocacy Programming made launching initiatives for your most engaged customers fairly easy. With lifecycle advocacy, you are aiming to engage a broader range of

customers, meeting them where they are already interacting. This means your “advostack” is getting bigger, incorporating more tools your colleagues use to interact with customers.


### Lifecycle advocacy in action

Despite challenges, it's exciting to see organizations take steps in implementing this approach. Here are just a few examples of what lifecycle advocacy can look like in practice.


 **Renewal Celebration:** One of the biggest misses by organizations is the lack of, well... anything really happening at the point of renewal. Typically, there's some negotiation back and forth, papers are signed and then we all go on our merry way, even though the customer has just undertaken the biggest act of advocacy there is - renewal! What an underutilized, opportune moment to build rapport and garner more advocacy!

Consider a scenario where this opportunity is closed-won in your CRM system and key account contacts are sent an “anniversary” card and link to claim a gift (a great example of “surprise and “delight”). This is also an opportune moment to ask if this client would be willing to be a reference, inserting both nurture and activation. This can be completely automated for scale or implemented as process play with the Customer Success or Customer Marketing team.

 **Driving Reviews:** Many teams strive to develop a constant stream of reviews instead of relying on point-in-time campaigns. The team at [Cong](#) has automated this process by tapping into product engagement metrics and sentiment evaluation. Designated contact roles as marked in SFDC who hit product visit goals within a specified timeframe (tracked through Gainsight) are instantly sent an NPS survey through Delighted. If the ranking is within the positive sentiment range, they are taken to a landing page where they are asked to write a G2 review at that opportune moment.

 **Customer Experience:** Beyond garnering advocacy, lifecycle advocacy brings together the advocacy journey and the customer journey. At my last organization, I wanted to ensure that members of one of my advocacy programs, a Customer Council, had a heightened experience in their day-to-day interactions with our organization. With some willing collaboration from the head of customer support, we orchestrated a simple heightened experience. When a member of the Customer Council reached out to support, it triggered an alert to the customer support specialist who was given guidance of a templated message to begin the initial response with: “I see that you're a member of our Customer Council. I first want to thank you for your work in

helping us continue to improve as an organization.”

 **Account Expansion:** We can also flip the idea of lifecycle advocacy to uncover a new angle: leveraging advocates at key points of the customer journey. When the customer advocacy team at [Alteryx](#) noticed that accounts with advocates were growing at 10x and those accounts stayed with Alteryx 60% longer than the average customer, they realized they had been leveraging advocates as extensions of the GTM teams.

Alteryx have adopted a new process of identifying account advocates at the renewal and expansion stage, working in tandem with these advocates to deeper understand their organizations' goals and leveraging them to improve their expansion approach. This has resulted in tangible wins and they continue to expand this lifecycle motion.

### How to Get Started with Lifecycle Advocacy

We're always met with excitement and interest when we share our vision for lifecycle advocacy with our clients and peers. But how does a customer advocacy practice put lifecycle advocacy in motion?

**Baby steps:** Don't be daunted by the amount of data or process integration that lifecycle advocacy requires. Start small with these steps.

# 6 steps to Start Building Lifecycle Advocacy

1

## ALIGN

Rather than tackling the entire customer journey, start with leadership's main priorities, as well as any gaps or pain points. Identify the biggest needs for the organization or customers and determine opportune moments to nurture customers or engage them for action.

## IDENTIFY

Now, review or map the key interactions in the customer journey. Identify 2-3 opportune moments that are most accessible and relevant for driving toward the key KPIs from step one.

2

3

## COLLABORATE

Meet with cross-departmental stakeholders to agree on goals, processes and what success looks like.

## SKETCH

Map processes or automation workflows to nurture or activate customers by presenting the right opportunity to the right person at the right moment. Determine the necessary technologies and data flow.

4

5

## OPERATIONALIZE

Work cross-functionality to implement your customer engagement flows throughout existing tools, technology and processes.

## MEASURE

Measure the impact of your lifecycle advocacy workflow and iterate.

6

 Captivate Collective

Have you already started designing and operationalizing lifecycle advocacy or are you ready to begin? Welcome to the frontier of B2B customer advocacy. We are excited to see you here.



### **Author: Liz Richardson, Co-Founder of The Captivate Collective**

Liz is an award-winning customer marketer and advocacy executive known for her innovative work in customer engagement methodology. She has built advocacy service teams from the ground up and served previously as a CS leader and VP of Customer Advocacy at advocacy software category-creator Influitive. As co-founder at Captivate Collective, she continues to generate best practices and education in the customer marketing and engagement field, working with such organizations as Siemens, Cisco, SUSE, Gong and more.

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# Leveraging AI in Customer Marketing, Advocacy, & Community

By: Lauren Turner & Alison Bukowski

Last year was the year of Artificial Intelligence (AI); it was everywhere from news outlets and industry publications to board room meetings and investor conferences. It threatened to reduce the American workforce while simultaneously promising to improve productivity. AI amused us with quirky caricatures, informed us on everything from medical concerns to vacation planning, and took a toll on the marketing industry that many of us work within.

If industry reports are accurate, you likely operate as a department of one, or lead an under-resourced team. And, considering the current state of the tech industry, you likely identify with one (or more) of the following statements:

1. I recognize the ubiquity of generative AI tools; I want to leverage them to work more effectively and efficiently
2. I maintain concerns about the quality of generative AI output and its interference in content creation and consumption
3. I fear elimination of roles within organizations due to AI's capabilities and/or an overreaction leading to an overcorrection in hiring practices

## ChatGPT: Strengths and Limitations

Christina Garnett, Founder of Pocket CCO, describes ChatGPT as “the smartest intern you’ll ever have” - wise words. After all, ChatGPT creates strategic plans, helps brainstorm ideas, analyzes data, and does a lot of “grunt work,” but you must give explicit instructions and guardrails. In other words, AI is a lot like an adolescent; it is autonomous to a degree, but requires oversight. If you’re not checking AI-produced citations, you may end up with bland, useless, or just plain inaccurate output.

Here’s a summary of what AI can and cannot (should not) do:

### What ChatGPT Can Do

- Analyze, summarize and organize data
- Create copy for emails, blogs, case studies, e-books and more
- Create strategic plans
- Help with brainstorming
- Refine language for readability, tone, and best practices

### What ChatGPT Can't Do

- Protect your IP
- Produce graphics (on the free version)
- Reliably cite sources
- Have a human conversation with your customers
- Reward customer loyalty
- Connect your customers to each other
- Replace your creativity, humor, or personality

## ChatGPT in Action: An Example - Building Alyce's Gifting Gurus Community

As a “customer marketing and community department of one,” there was limited time and few resources to build Alyce’s community. Enter: ChatGPT. It was extremely useful for the different stages of development, from building the business case for the community to planning stages through launch. Here are examples of prompts used for various stages:

### Branding

*I need a name for my new customer community. The community is geared primarily toward administrators of the Alyce gifting platform. Give me ten suggestions. Keep the names short. Have the names in some way related to gifting. Use alliteration or puns where possible.*

This is how the name Alyce Gifting Gurus came to be, which customers love!

### Planning

*Give me a 30-day plan for building and launching a customer community via Influitive. Include all steps,*

*including evangelizing the community internally, organization, choosing the right customers to invite to the pilot, and the most important ten challenges I can create to drive engagement.*

### **Re-engaging New Community Members who Disengaged Early**

*What are ten ways I can energize a customer who joined my community but never engaged in any of the activities? After you create that list, put together a re-engagement email campaign targeted toward this group of customers that I can customize.*

### **Clarifying “legalese” for Customers to Understand**

*I’m going to upload a standardized terms and conditions document for our rewards page. Please rewrite to a 5th grade reading level while retaining the main points.*

For the more involved requests, add: *Ask me any relevant questions before generating.* This way, ChatGPT will ask for additional information inadvertently forgotten, in order to get a more thorough response.

Just as if these requests went to a “really smart intern,” there is then interpretation of the output required. ChatGPT’s output serves as a solid starting point to then edit, refine, and personalize the content.

In no way is the information generated by AI expected to be a finished product, but it’s a great way to kickstart planning, strategy,

and execution processes in a way that saves weeks of work. From signing the contract with Influitive to the pilot launch of the Alyce Gifting Gurus site, AI helped achieve this within three weeks versus the average of 12 weeks.

### **ChatGPT’s Superpower: Time Savings**

ChatGPT allows more content creation, thought organization, data extraction, and recommendations for improvement. All valuable.

But, ChatGPT cannot connect to customers on a uniquely human level. And this is where caution must be applied.

Have you ever gone into a customer meeting and found the conversation (pleasantly) derailed by talk of personal matters? A chatbot won’t pick up on body language or other subtle cues your customer presents, indicating they have other things on their mind. As a human being, you know talking to this customer about his mom’s chemotherapy/baby’s first steps/prize-winning banana bread recipe is going to be the best way to help him connect and build a relationship.

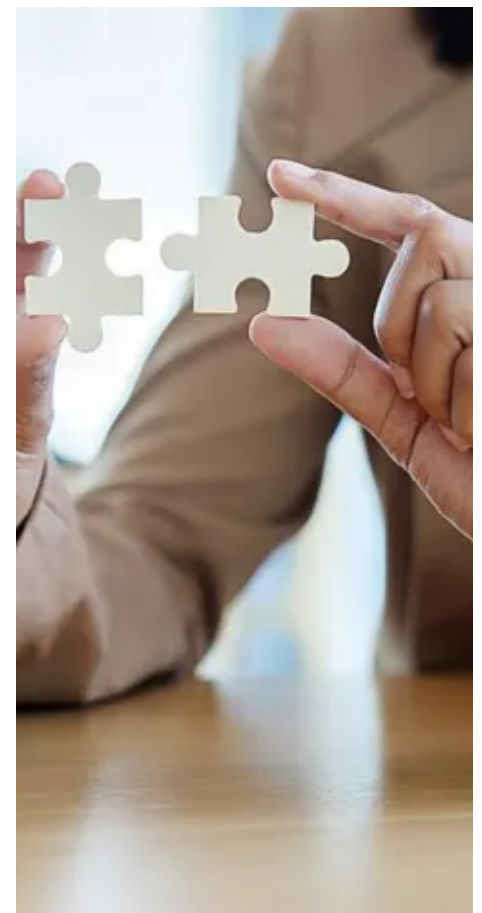
Yes, at some point, you need to address the business issue, but the customer will value your relationship, and by extension, your product/company more because you listened, and more importantly, cared.

You can’t fake empathy and

compassion with a chatbot no matter how good the prompt.

With all the time ChatGPT saves, ask: What uniquely human things can be achieved with the time saved? Show customers you care about them as people. Ask questions about their lives inside and outside the office. Take the time to build relationships.

Prove your value to customers AND your company. Demonstrate that while you’re a tech-savvy leader that will leverage tools to improve productivity, you’re also a valuable employee that enhances the overall customer experience - the foundation for growth, retention, and yes, revenue (regardless of how big your tech stack may be).





**Author: Lauren Turner, Director, Customer Marketing**

Lauren is obsessed with driving experiences to customers that are engaging, educational and drive revenue and growth. Her work has earned multiple awards including being named to the CMA100 list of customer advocacy strategists and influencers, and 3 Bammie awards. She was recently the Director of Customer Marketing at Alyce, a platform that enables companies to enhance customer and prospect relationships by sending personalized gifts at scale. In her spare time she performs improv comedy at the Doghouse Theater as part of the cast of Sick Puppies Comedy in Delray Beach, Florida.

**Author: Alison Bukowski, Vice President, CX at Point of Reference**

Winner of multiple awards and highlighted speaker at industry events, Alison's background is rooted in customer-led growth. Alison prides herself on leading through empathy and putting the customer at the forefront to create an engaging, multi-dimensional customer experience that drives strong business value and results. With over twenty years in marketing, customer success, and sales operations, Alison recently pursued her passion in this area to focus exclusively on the overall customer experience and how each component of the customer journey needs to be represented and reflected in business operations, decisions, and strategy. Personally, Alison fancies herself a better-than-average baker, curious adventurer, and thrift shop enthusiast.



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# Pioneering Community and Customer Success in the Digital Age

## A Spotlight Conversation with Nisha Baxi, Director of Digital Customer Success & Community at Gong

Interviewed By: Adrian Speyer

Life's journey is often shaped by a handful of defining moments, steering us along unexpected paths. Nisha Baxi didn't intend to enter the fields of community engagement and customer success – but it's where she ended up and where she would excel. With a diverse background that traverses the tech industry giants, Baxi's journey is a narrative of resilience, strategic foresight, and the transformative power of community.

### From Tech Enthusiast to Finding a Path

Nisha Baxi's professional odyssey began at the intersection of academia and technology. Initially poised to enter the world of clinical psychology, Baxi's trajectory took a serendipitous turn towards technology. Baxi reflected on her early journey of discovery:

"Landing a role at IBM during my college days proved to be a game-changer, setting the stage for my future endeavors. The memory of nervously competing against

numerous candidates from prestigious institutions like the University of Chicago and Northwestern still lingers vividly. To my surprise, the call confirming my selection remains etched as a promising launchpad to my future career.

I teetered on the brink of pursuing a Ph.D. in clinical psychology and almost started school there until a persuasive nudge from my uncle altered my trajectory. His belief in my potential for the go-to-market led me to embrace a summer internship at a startup, a decision I'm so glad I ended up making.

During this time, I began organizing a community meetup for sheer enjoyment, Silicon Valley New Tech and scaled that to over 15,000 people! That unexpectedly unveiled a potential career path in community!

The true watershed moment was when I made the leap from a startup to a corporate giant like Microsoft. This transition wasn't just about gaining credibility in the tech world; it catapulted me

deep into the realms of community and developer evangelism. Breaking into such a significant company marked a new chapter in my career trajectory—one that would become the cornerstone of my career."

And thus, she found her calling in connecting people, which continues today!

### Empowering Women in Tech

The tech industry's labyrinth has also presented unique challenges, particularly for women striving to carve out their space. Baxi confronted these challenges head-on, recognizing the disparity in perceptions and opportunities. "The industry sometimes unwittingly perpetuates a culture where women feel they must prove their worth repeatedly," Baxi notes. Her strategy was twofold: robust self-advocacy and the cultivation of a supportive community. "You have to be the champion of your own story while fostering an environment that uplifts others," Baxi advises,

highlighting the dual approach of personal resilience and communal support.

### **Reinventing Customer Success at Gong: A Community-Centric Approach**

At Gong, Baxi's innovative approach to integrating community engagement with customer success has redefined the company's strategy. "I had the incredible opportunity to spearhead the creation and successful launch of both the Gong Community and the Gong Visioneer brand and Ecosystem, a venture that held immense significance for our organization. Building these platforms from the ground up not only marked a pivotal milestone but also presented a transformative moment that resonated deeply with our customers, amplifying our reach and impact across the community and industry at large," says Baxi. Her vision extended beyond conventional customer service models, aiming to create a holistic ecosystem that enhances the user experience at every touchpoint. Through this platform, customers could not only seek solutions but also share insights, fostering a vibrant ecosystem of mutual support and knowledge exchange.

We asked Nisha some of her success stories with this approach, "There are so many great stories. One of my favorites was when a head of customer success, let me know that the community bridged the gap between what they learned from their CSM, and when

they actually went to implementation. It's a testament to the tangible value our community provides in bridging crucial gaps within our users' journey, facilitating a smoother transition from learning to real-world application."

### **A Commitment to Philanthropy**

Baxi's commitment to making a difference extends well beyond her professional endeavors. Her involvement with the Tiffany Circle at the Red Cross is a reflection of her deep-seated belief in the power of giving back. "Philanthropy is more than a duty; it's a calling. Since I was 14, I've been fortunate to dedicate my time to volunteering with the Red Cross, witnessing the evolution of my roles within the organization. My involvement with the Red Cross has been incredibly fulfilling, allowing me to make a tangible impact on communities in need," Baxi shares. Her work with the Red Cross is not just about contributions but about mobilizing communities towards a common goal of humanitarian aid, demonstrating the profound impact of collective action.

Nisha has lots to be proud of in her role as co-chair of the Northern California Coastal Region Tiffany Circle and as a board member of the Silicon Valley Chapter. She is helping to lead initiatives to further the Red Cross mission and making the world a better place. As Nisha shares: "One of the most fulfilling projects was organizing our Tiffany Circle National Summit this past October, which

successfully raised over \$1.2 million aimed at combatting Sickle Cell Disease, a prevalent blood disorder in the United States. It was an inspiring demonstration of our collective commitment to addressing critical healthcare challenges."

She has also been recognized for her work in 2020 when she received the President's Volunteer Service Award from President Joe Biden. As Nisha tells us, "It was a meaningful acknowledgment not just of my efforts, but also of the entire community's dedication to supporting the Red Cross' mission. These experiences highlight our shared determination to make a real impact through philanthropy and service."

### **The Balancing Act: Juggling Professional and Philanthropic Pursuits**

Striking a balance between a high-octane career and philanthropic commitments is no mean feat. For Baxi, this equilibrium is rooted in a profound alignment of her personal and professional values. "The synergy between my role at Gong and my philanthropic endeavors with the Red Cross is a powerful force that drives me," she reflects. This harmony is facilitated by the supportive cultures of both Gong and the Red Cross, which not only recognize, but also celebrate the interconnection of professional excellence and social responsibility. She also credits the Tiffany Circle with helping her be inspired by the incredible influence of strong and accomplished women. As Nisha

shared, "Being in their midst has been a catalyst for my personal and professional growth. There is truly an undeniable power in observing these women in action, learning from their experiences, and absorbing their wisdom - it has been a source of empowerment that influences my goals and ambitions."

As an advocate of service to the community, Nisha offers this advice to leaders looking to balance their career and philanthropic aspirations:

"My advice is rooted in the conviction that passion serves as the driving force. When you believe wholeheartedly in a cause, carving out time becomes not just a necessity but a fulfilling commitment. Each hour dedicated to helping others is an investment that not only contributes to the well-being of the community but also serves as fuel for personal and professional growth.

As Clara Barton wisely noted, 'You must never so much think as whether you like it or not, whether it is bearable or not; you must never think of anything except the need, and how to meet it.' This quote encapsulates the essence of selfless dedication and the transformative power of focusing on the genuine needs of others. It resonates with the idea that, by prioritizing community service and philanthropy, leaders not only contribute positively to society but also enhance their own professional journey through a profound sense of purpose and fulfillment."

## **The Future of Digital Engagement**

Looking ahead, Baxi is enthusiastic about the evolving landscape of customer success and community engagement. "We're on the cusp of a new era where technology enables us to personalize experiences like never before, making every community interaction uniquely impactful. The future is personalization at scale. It's about leveraging technology to create more meaningful, individualized interactions that resonate with each community member". Another noteworthy shift she shared is "the convergence of Customer Success Managers with sales objectives. This alignment signifies a strategic fusion between fostering strong customer relationships and driving revenue growth. It emphasizes the dual role of CSMs as both relationship builders and revenue contributors."

With her work at Gong and their deep experiences in Sales, she is excited by the significant opportunity to lead the industry in shaping these trends. As she shared, "We have a chance to establish new benchmarks and pioneer innovative strategies that harmonize customer success and community engagement in novel and impactful ways."

## **Inspiring a Legacy of Leadership and Community**

For those looking to make their mark in the tech industry or any field, Baxi offers sage advice:

"Challenges are inevitable, but it's how we navigate them that defines our path."

"In navigating challenges within my career and philanthropic endeavors, I draw strength from a personal mantra: 'You must grow through the experiences that are sent your way, even if they are not ones that you asked for.' Embracing this philosophy, I've learned to accept challenges as an inherent part of life's journey. Resilience, to me, involves not resisting these obstacles but rather understanding that they are an integral aspect of growth. Letting go of the need for complete control has been pivotal. It's about recognizing that while we can't control most things, our response to challenges shapes our resilience. Accepting this truth has empowered me to adapt, learn, and persist through adversity, fostering a stronger sense of resilience and motivation."

As we have seen, her journey exemplifies the profound impact of resilience, advocacy, and community engagement, which can provide a roadmap for aspiring professionals everywhere.

### **Nisha's 3 rules for success in building at the intersection of community & customer success**

1. Learn best practices from people and companies that have succeeded in what you're trying to build.
2. Surround yourself with the best people at your company to accomplish the goal.
3. ALWAYS build for the customer - put yourself in their shoes; anything you build with this in mind, you're less likely to go awry



## **Nisha Baxi, Director of Digital Customer Success & Community at Gong**

Nisha Baxi is the Director of Digital Customer Success & Community at Gong, former Head of Marketing, and founding team member of Monte Carlo Data. She has had the pleasure of growing a prominent Silicon Valley entrepreneurship community organization with 15K members and built programs and frameworks at Microsoft, Salesforce, and Facebook that are still used today, continuing to drive adoption and foster loyalty.

Nisha is also the co-chair of Tiffany Circle NCCR, a board member of the Silicon Valley Chapter, and on the committee of the SF Gala, which raises \$1M annually for the Red Cross. She has been a volunteer since 1999 when she joined as a High School Freshmen in Youth Services and confers the Annual Nisha Baxi Award for the Volunteer of the Year for a Youth yearly.

Nisha is on the Board of Directors for the American Red Cross, enjoys golfing and lives in Mountain View, CA with her husband, Neel Mehta.



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		Yearly Purchases	Typical Savings per Purchase	Yearly Savings
<b>EAT</b>	Breakfast/ Coffee	52 purchases	\$2.50	\$130
	Lunch	24 meals	\$3	\$72
	Dinner	52 meals	\$5	\$260
	Pizza	24 purchases	\$8	\$192
				<b>\$654</b>
<b>SHOP</b>	Apparel	8 purchases	\$15	\$120
	Misc. Shopping	8 purchases	\$12.50	\$100
	Flowers/Gifts	4 purchases	\$10	\$40
	Home Projects	2 purchases	\$50	\$100
	Oil Changes	4 services	\$10	\$40
	Self-Care <small>(Spa, Gym, Makeup, etc.)</small>	6 purchases	\$30	\$180
				<b>\$580</b>
<b>PLAY</b>	Theme Park Visits	4 passes	\$50	\$200
	Bowling/Laser Tag/Mini Golf	4 purchases	\$5	\$20
	Concerts/Sports/ Event Tickets	4 tickets	\$20	\$80
	Movies	6 tickets	\$2	\$12
	Golf	4 rounds	\$15	\$60
				<b>\$372</b>
<b>TRAVEL</b>	Hotel Stays	7 nights	\$15	\$105
	Car Rental	5 days	\$27	\$135
	Cruise	2 tickets	\$58	\$116
	Flights	2 tickets	\$20	\$40
				<b>\$396</b>
<b>TOTAL SAVINGS:</b>				<b>\$2,002</b>

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- BRICE T.



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- PATRICIA C.



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**SCAN ME**



# Drive Membership Growth for your Association: A Guide to Email Marketing

By: Erica Salm Rench

If we've learned anything from this past year, it's that email marketing is alive and well. According to a [study by Hubspot](#), in the last 12 months, 77% of marketers have seen an increase in email engagement.

Email marketing is still seeing a major revitalization in 2024, with over 4 billion daily email users, and this growth is projected to continue to grow. Associations are prime candidates for capitalizing on this massive growth.

Here, we show you how to craft the perfect email marketing campaign for your association by going over the best practices for email marketing.

## Overview of Email Marketing for Associations

As the most direct, efficient, and effective way of reaching your target audience, email marketing has been around for a long time. This direct digital marketing approach involves sending carefully curated emails to specific audiences with specific engagement goals in mind.

Perhaps your email marketing

campaign consists of keeping in touch with existing members to keep them coming back. Or maybe the goal of your campaign is to convert promising prospects into loyal members.

No matter the end, email marketing can be an effective means; so long as you use this powerful tool properly.

find new members and keep your members coming back?

## How Do Newsletters Support These Efforts?

What is newsletter marketing? How does it work? Most importantly, how can it help you find new members and keep your members coming back?

To answer this question, let's look at the [2023 Membership Marketing Benchmarking Report by MGI](#). According to the study, email is still the most effective tool in recruiting members and retaining members.

Email newsletters are essentially weekly reminders to your email

subscribers that your association is present. With email newsletters, you can inform your audience of the latest updates, news, and your association's digest.

The goal of newsletter marketing is to keep your association fresh in the minds of your subscribers. If the initial subscription to your email list is the hook, a well-crafted newsletter is the line that keeps you connected to your members.

When you establish a good rapport with your member base via email marketing, their engagement with your association will increase.

## Are email newsletters dead?

The evidence says no; email newsletters are alive and well. As per [Hubspot](#), 81% of B2B marketers say their most used form of content marketing is email newsletters.

## Getting Started With Association Email Marketing

Now that you know the

importance of email marketing, it's time to go over how you can implement this incredible tool into your digital marketing arsenal.

### **Remember, you're a guest in their inbox!**

While you want to make your presence known in your subscribers' inbox, it's also important to remember that you're a guest there. According to a [study from Marketing Charts](#), the leading cause of unsubscribes is sending too many emails.

The same study found that the sweet spot for email frequency is 1-2 per week. This allows you to stay relevant in the mind of the subscriber without flooding their inbox with emails.

While there are many opportunities for success with email marketing, there are just as many pitfalls that can cost you members. Here are a few ways you can maintain your audience's interest while avoiding the mistakes that will lead them to unsubscribe.

#### **1. Get Permission:**

The first step of any great email marketing campaign is to get permission from your audience. This can take the form of a newsletter signup form on your website, subscription ask after a purchase, and so on. As long as you get your subscribers' permission, you're off to a great start.

#### **2. Follow Through with Great Content:**

After you have your subscribers,

it's time to start delivering quality content to them. The best way to make your audience feel valued is to offer personalized content.

Instead of having the greeting read: "Dear member", make the emails address your subscribers by name. [The Business to Business Community](#) found that personalized greetings generate six times more engagement with members.

Additionally, emails with personalized subject lines are 26% more likely to be opened by recipients. The best way to get your foot in the door is to make a genuine outreach to your members.

The type of content you produce and share in your email newsletter depends on the type of association you're running. Make sure that your content is engaging, and calls your audience to act in some way.

It's also important to practice market segmentation with your email marketing content. Show the right content to the right people for the best results.

#### **3. Know When to Pitch a Membership:**

Lastly, it's important to know the right timing to pitch your association to potential members. While it's tempting to jump the gun and release your promotional material as soon as you gain subscribers, understand that most potential members will need to be "warmed up".

According to [Copper's Sales Tactics Blog](#), you should wait until you have already established a relationship with your audience. This is why market segmentation is so important.

When you're sending an email campaign, prioritize your existing members over potential members. It sounds counterintuitive, but people tend to reject an outright hard sale. Show them what they could have as a member, and allow them to make the decision to join for themselves. Flooding the inbox of new leads with membership pitches might overwhelm them, and cause them to unsubscribe.

### **Difference Between a Good and Bad Email Newsletter**

Email newsletters can be flawless breadwinners or they can fail spectacularly. The difference between the perfect email newsletter and a complete dud are surprisingly minor ones.

The best newsletters strike a perfect balance between staying relevant to your audience and overloading them with emails. The best email newsletters send 1 to 2 emails per week to their subscribers.

Next, you need to nail the timing of your emails. There are three windows of opportunity per day to send an email. These are between 8:00 AM to 10:00 AM, 1:00 PM to 4:00 PM, and finally 6:00 PM.

Data from [Campaign Monitor](#) finds that most people check their email inbox during these times. Take advantage of this and schedule your emails to send at these times. It helps to test a few days and times out over a few weeks to gather data about your specific audience. Even within the same industry, your specific niche may have totally different email habits than another niche – intel on CTRs and other metrics will help you optimize your emailing.

specific audience. Even within the same industry, your specific niche may have totally different email habits than another niche – intel on CTRs and other metrics will help you optimize your emailing.

### 1. Include Information About Your Events

People join your association to be a part of something – not just to read your content. Highlighting your events, including conferences, speakers, volunteer opportunities and the like, incentivizes on-the-fence members to join. Show them that current members are making friends and memories by describing past events in your email marketing campaign!

### 2. Analytics and Segmentation

Data is very important for running a successful email marketing campaign. You need to keep tabs on what works, what doesn't, and who is engaging with your emails.

Keeping an eye on the data also helps your market segmentation efforts. Take advantage of your data to see how many people make up each of your market segments. This will help you allocate the proper amount of time and resources to each segment.

You can also use the analytics from your email marketing to see how effective your strategy is overall, and where you can make improvements

### Wrapping Up Email Marketing for Associations

In conclusion, email marketing is a strong tool for driving growth and membership in associations, but only if used correctly. As long as you appear authentic, don't overload your audience, and provide quality content, email marketing is a great way to nurture those who are already members, and give just the right push to those who are on the

fence about joining.

Now it's up to you to make your email marketing strategy work for your association. Follow this guide while implementing your plan, and it's guaranteed to succeed.



**Author: Erica Salm Rench, COO at Rasa.io**

After working in enrollment management where she focused on recruitment strategy and marketing, Erica managed a team of online marketers at the largest digital marketing company in the Gulf South. There, she supported the web development, SEO, online advertising, and content marketing teams in executing strategies which elevated organizations to stand out and be seen amongst the chaos of the online marketplace. Now, as the COO at [rasa.io](#), she gets to blend her love of digital marketing technology and email in order to support the incredible community of [rasa.io](#) customers.

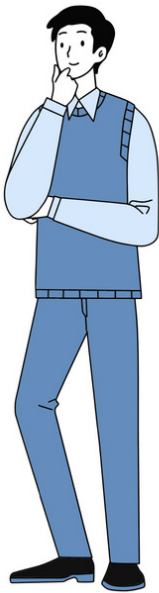


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# Fostering User-Generated Content

By: Selin Yaşar

In the dynamic realm of community management, the real gold lies in user-generated content (UGC). It's the heartbeat of any thriving online community, serving as a mirror to the community's soul. Let's deep-dive into the art of encouraging UGC, a topic vital for professionals who are well-versed in the essentials and seeking to elevate their communities to new heights.



## 1. Cultivating a Sharing Culture

**Empowerment through Recognition:** Celebrate contributions by regularly featuring outstanding posts,

offering shoutouts in newsletters, or creating a 'member of the month' spotlight. This recognition fosters a sense of achievement and encourages continual contribution.

### **Storytelling Encouragement:**

Encourage members to share their journeys, experiences, or how your community has impacted their lives. This storytelling aspect not only boosts engagement but also adds a personal touch, making the community more relatable and authentic.



## 2. Design Engaging Challenges and Contests

**Innovative Competitions:** Host themed contests or challenges that resonate with your

community's niche. Ensure these activities are accessible and compelling, encouraging participation across skill levels. This approach not only diversifies content but also taps into different member interests and skills.

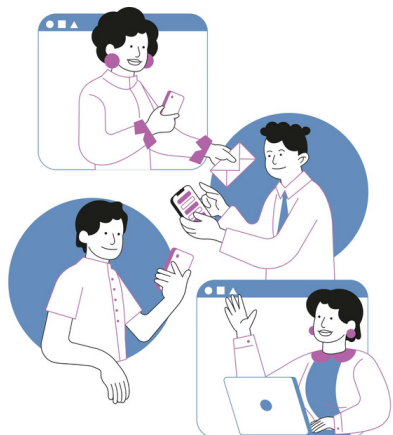
**Reward Creativity:** Offer meaningful incentives, such as exclusive content, collaboration opportunities, or featuring their work within the community. This approach recognizes and values creative efforts, further incentivizing participation.

## 3. Create Collaborative Opportunities

**Crowdsourcing Projects:** Involve members in creating something collectively, like a community guide, a collaborative art project, or a knowledge base. This collaborative approach instills a sense of ownership and pride and fosters a deeper connection with the community.

**Interactive Q&A Sessions:** Host regular Q&A sessions where members can contribute their expertise or insights on various topics. This not only provides a platform for knowledge sharing but also encourages diverse

perspectives and content generation.



## 4. Leverage Feedback Loops

**Regular Surveys:** Use surveys or polls to understand what your community members enjoy and what they'd like to see more of. This feedback is crucial for tailoring your strategies to encourage UGC, ensuring that content remains relevant and engaging.

**Open Idea Box:** Create a space where members can propose ideas for content, events, or improvements. This not only generates a wealth of content ideas but also makes members feel heard and valued, further boosting their commitment to the community.

## 5. Foster a Safe and Supportive Environment

**Clear Guidelines:** Ensure your community guidelines are well-communicated and upheld. A safe environment is essential for open

and authentic sharing, as it fosters a sense of security among members.

**Conflict Management:** Be proactive in managing conflicts and ensuring that the community remains a supportive space for all members. Effective conflict management not only maintains harmony but also strengthens the community's foundation.

## 6. Utilize the Power of Social Proof

**Testimonials and Success Stories:** Share testimonials or success stories of how participating in the community and generating content has benefited members. This not only serves as inspiration but also as tangible proof of the community's positive impact.

**Highlight User Success:** Celebrate significant achievements of members. Recognizing these successes not only inspires others to contribute but also reinforces the value of active participation in the community.

Encouraging user-generated content isn't just about increasing engagement; it's about building a living, breathing ecosystem where each member feels valued and inspired to contribute.

By implementing these strategies, community managers can unlock the full potential of their communities, turning them into vibrant hubs of collaboration, creativity, and shared success.



Remember, the journey of nurturing UGC is continuous and ever-evolving. Keep experimenting, listening, and adapting to the community's needs and feedback. Stay committed to creating an inclusive, engaging, and dynamic environment. Let's keep the lights of our communities shining bright with the vibrant colors of user-generated content, ensuring each member's voice is heard and celebrated.



### Author Bio:

Selin Yaşar is a passionate community manager with a background in international relations and digital marketing. She believes that nurturing thriving communities is essential for brand success in the digital era.

[Connect with her here](#)



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# An Excerpt from *Becoming The Change: The Power of Cultural Intelligence*

by Loren Rosario-Maldonado



“Knowing yourself is the beginning of all wisdom.”

-ARISTOTLE

"Is there a particular reason why you always speak in Spanish?" I recall asking an employee in our weekly one-on-one. I still cringe at this memory. As a high achiever, I assumed that others' sense of achievement was like mine, and I approached my leadership style the same way, through the lens of achievement. I was trying to boost and polish her professionally by urging her to practice her English more. Although I had the best intentions, the insensitivity behind my conversation was not motivational, and our relationship was doomed from the start. This conversation was one of our first encounters since I started working with her. Little did I know it would be the one that would set the tone for our future relationship. I didn't see this as an opportunity to build trust and rapport with her because I was so focused on achievement that I missed this critical social cue. The weight of my mistake hung heavily over me

as I struggled to make amends over time. Another cultural faux pas on my part!

## THE SHIFT

This is a story of self-discovery. You see, I lived much of my life under the influence of cultural assumptions that, unbeknownst to me, were shaping my actions and interactions, both in my personal life and career.

Allow me to take you back to a pivotal moment in my life, five years ago, when I stepped into a multicultural counseling class during my master's program. The objective was clear: understanding cultural differences and their history and developing the skills required to counsel diverse communities. I was eager and ready to learn how to guide various populations, knowing that, as a global leader, my understanding needed to expand

beyond my somewhat sheltered, middle-class female perspective.

My journey up until that point had been relatively smooth. I had a comfortable upbringing, a quality education, and ample opportunities for success. I was blissfully unaware of the structural forces that propelled my life in certain directions until I was confronted with the profound concept of "unearned societal privilege" based on my skin color.

The class thesis required an in-depth immersion into a culture of our choosing to comprehend its history and societal norms. I chose to delve into my own Dominican culture, an area I needed to gain more knowledge of outside of platanos (fried plantains), queso frito (fried cheese), and Merengue (our national dance).

As I delved deeper into my coursework, I was stunned. Case

studies and sociological data highlighted the systemic inequalities and privileges I had been oblivious to for so long. This revelation of privilege, this jarring reality check, threw my identity into question. After all, I had always believed in meritocracy, or the power of hard work leading to success. To realize that my achievements weren't solely the product of my efforts but were, in part, due to systemic advantages was humbling, even shocking.

The more I disconnected from my fragmented identity, the more I found myself in an existential crisis, unsure of my affiliations, who I was, and where I came from. The culture of my heritage and my culturally neutral self clashed, creating a fissure in my self-perception. I was taken aback to realize my skin color had bestowed upon me unearned privileges, making me, to my horror, complicit in microaggressive acts and, yes, even racism.

Despite having service as a central tenet of my moral code, I lived in a culturally agnostic state that, while adaptable and valuable, masked my privilege. My ignorance of this privilege led me to inadvertently disrespect others' cultural values and identities. I grappled with a fragmented identity that persists today as I took a deep and brutally honest look at all the parts of me that influenced my life and those I served.

Standing on the precipice of a cultural divide, I was confronted with the profound disconnect

between my identity, cultural values, and Dominican roots. It was a daunting revelation: My existence was teetering on the edge of a cultural abyss, a void widened by years of acting as a cultural chameleon.

That my oversight of the integral aspects of someone's identity could be a subtle form of discrimination was a bitter pill to swallow. I found myself feeling guilty for participating in minor behaviors that had the potential to harm people. This realization left me feeling regretful, guilty, and conflicted. And I was not alone. I realized I was unknowingly perpetuating behaviors that had persisted for generations, even as a global HR leader.

But amid this whirlwind of self-discovery and introspection, I discovered Cultural Intelligence (CQ). This framework gave me the tools to appreciate, understand, and adapt to different cultures, including my own. It taught me that our differences are not barriers but bridges if we allow them to be. Embracing my cultural intelligence, I began understanding how my cultural values shaped my lived experience. I learned my identity is multidimensional and shaped by those lived experiences, which were determined by my cultural values. This tumultuous existential crisis was no longer a burden but an opportunity to see the world through a multitude of lenses and to appreciate the richness of diversity.

## **PRIVILEGE**

As the child of a middle-class Christian preacher, I was raised with the values of service, morality, and seeing goodness in others. It's the upbringing that paints a picture of hope and aspiration. But, like many things in life, my understanding of the world was not without its flaws. I used to see privilege through a particular lens—wealth and societal power with the assumption that it was as simple as that. If you had money and held sway in society, you were privileged. But I realize this view is far too narrow and disconnected from the rich tapestry of human experience.

Recognizing my privileges in certain areas is a humbling experience. Privilege isn't something we often think consciously about. Privilege is not just about the size of your bank account or societal influence. It is qualitative as much as it is quantitative. It's interwoven with the cultural identities we carry and the personal journeys we undertake. Especially if we benefit from it, it's like an invisible tailwind that propels us forward and can be related to various aspects of our identity, such as race, gender, class, or geographical location.

Imagine walking into a room filled with a buffet of experiences. Now, picture your choices based on your preferences and what you seek, shaping your unique taste. That's what forming our identity is like—a complex blend of our choices, circumstances, and, importantly, cultural values and privilege.

Let's start by looking at cultural

values. They're like the recipes passed down through generations, forming a roadmap for our behaviors, beliefs, and even our approach to life. We interpret the world and our place within it through this cultural lens. It's like being in a dance where our upbringing and societal norms have influenced the music, rhythm, and steps.

But here's the twist: While we're all participating in this dance, only some hear the same music or move to the same beat. That's where privilege comes in, a dimension of our lives that often goes unnoticed, particularly by those who possess it.

Imagine privilege as an all-access pass you've somehow ended up with. It grants an unobstructed view of the stage and a smoother dance floor to twirl on. This pass isn't something you've asked for, nor is it something you've necessarily earned. It's based on aspects of your identity that society values more, maybe your race, class, gender, or sexual orientation.

Cultural values and privilege aren't operating in silos. They're intricately woven, influencing our sense of identity. Suppose you've been raised in a culture valuing independence and self-expression and have been lucky enough to have the privilege. In that case, your dance moves will likely be confident and unapologetic. Your world is your stage, and your identity develops with a stronger sense of self-assured individuality.

Now, consider another scenario. You're from a culture where collective harmony and respect for authority are paramount. But let's say your all-access pass has some limitations. You're marginalized due to factors beyond your control—socioeconomic background, education, race, or gender. This scenario throws in unique choreography. While your cultural values lean toward community and shared experiences, the hurdles you face may inculcate resilience and an awareness of systemic inequalities, contributing to a more complex, multifaceted identity.

Once I began acknowledging privilege, I realized it doesn't define me completely. So yes, I am privileged, but that's not where my story ends. It's an essential puzzle piece chapter in my book, but only part of the picture. That's where cultural values come into play. These principles, norms, and beliefs have been instilled in me since childhood. They're shaped by my family, community, and country, forming the core of who I am.

My identity is shaped by many things, from the cultural values ingrained in me to the experiences I've had, the people I've met, the lessons I've learned, and the privileges I've been granted.

## **UNDERSTANDING MY ROOTS**

Let's talk honestly about culture, privilege, and how our early experiences shape our perceptions of the world. Sometimes we can

live with blinders, only seeing what's directly in front of us, failing to realize that we are part of a vast, intricate tapestry of culture and history. And I was no exception. For so long, I was disconnected from my cultural roots, which shaped my perspective of life.

I was born and raised in the United States to Dominican immigrants. My parents instilled a strong sense of familial duty, collective responsibility, and interdependence. In their culture, prioritizing family above all else, including one's aspirations, was a deeply held value.

I lived in predominantly Anglo neighborhoods and attended local schools. From an early age, I was steeped in mainstream American society's cultural norms and values. The emphasis on individualism, independence, and direct communication shaped my worldview. From an early age, I absorbed the societal values around me, shaped by the predominant Anglo-American culture in my community. The American ideals of independence, personal achievement, and autonomy shaped my outlook on life.

At the same time, my home was a slice of the Dominican Republic in America, with its bustling relationships, the tantalizing aroma of traditional dishes, and the Spanish language filling the air. My parents held tight to their cultural values, including a strong sense of family, respect for elders, collectivism, shared

responsibility, and a more indirect approach to communication. Although I spoke English fluently, I could not speak it at home. As I grew older, I found myself caught between these two worlds. At school, assertiveness and outspokenness were praised, reflecting the valued traits in American culture. But at home, these qualities were considered offensive and disrespectful, particularly toward elders.

As I grew older, the tension between my American and Dominican values became more pronounced. I was thrilled when I received an offer in my senior year of high school to attend college away from home. It wasn't very far, and I could not resist the opportunity. But my mom had different expectations. In addition to the cost, she believed I should attend a local college to remain close to home and continue to play an active role in family life, helping care for my younger sister.

My American upbringing taught me to seize the opportunity for higher education and personal growth, viewing it as a step toward independence and success. Yet, my family's concerns were rooted in Dominican values emphasizing family cohesion, collective support, and shared responsibility.

Caught between these contrasting cultural values, I faced a tough decision. On the one hand, I was eager to forge my path, consistent with the individualistic values I adapted from the broader American society. On the other hand, I felt a

strong sense of obligation to my family and collectivist Dominican roots. Ultimately, I chose to stay home and attend a local college.

My story highlights a few complexities of balancing differing cultural values at home. Many individuals, primarily second-generation immigrants, face navigating different cultural value systems within their families. Balancing the pursuit of personal aspirations with familial responsibilities can be a delicate task, requiring communication, understanding, and, sometimes, difficult compromises.

In this bubble I created for myself, I was continuously striving to do better, to be better, failing to acknowledge the privileges I already had. But then came a turning point. And let me tell you, it changed everything.

### **A CALL TO ACTION**

And thus, the road to my metamorphosis unfurled before me. I faced my shame and stared it down with a resilience born from newfound understanding. As I embarked on this enlightening journey, it was not just about learning but also unlearning—a task just as crucial. I scrutinized and questioned the biases and microaggressions I had unknowingly participated in. And I made a choice. I made a bold **C.H.O.I.C.E.** to become the change.

**C**—I summoned the courage to accept my journey and radically accept my biases in my search for self-awareness.

**H**—I humbled myself to the idea that bias is a part of me and all of us, and differences do not divide us. They unite us.

**O**—I became open to new experiences. I sought mentors and engaged in meaningful conversations with people from diverse backgrounds to gain different perspectives.

**I**—I integrated what I was learning with action each step of the way.

**C**—I became curious about our cultural differences and how they impact our behavior.

**E**—I summoned empathy for myself and others in this learning journey. I educated myself about my cultural values and how they impact my personal and professional relationships.

Believe me when I tell you my path was not without its tribulations. As I deepened my understanding of cultural values, a storm of confusion and discomfort often cast a shadow over me. Yet, I embraced these moments' pivotal role in molding my evolution. As an Afro-Latina who identifies as white, self-discovery was not just about understanding my cultural values or privileges. It was about confronting and dismantling the biases I carried within me. This was a critical step. It wasn't just about paving the way for a society brimming with inclusivity and equity but also about making room within myself for that inclusivity and equity to flourish.

I wanted to help cultivate a community where individuals, regardless of skin color, could celebrate their unique identities

without the specter of discrimination or marginalization looming over them. To do that, I had to face my biases and understand how they were a byproduct of my cultural values and privilege.

I had to grapple with the reality that my cultural values were only sometimes shared or universally beneficial. Understanding this fusion of cultural values and privilege didn't weaken my identity; it strengthened it. I realized my identity is multidimensional, composed of my heritage, my beliefs, my experiences, and, yes, my privileges.

This combined to form a unique blend that is constantly evolving as I learn and grow. The dance of identity formation is an ongoing process, an intricate tango of understanding and accepting the multifaceted nature of who I am. It's about navigating the complex interplay between cultural values, privilege, and personal biases.

It's a rich, challenging journey, but one that's worth every step. Because, at the end of the day, recognizing and embracing the complexity of our identities allows us to engage more authentically and empathetically with the world around us. And that is a step toward the inclusive and equitable society we all envision.

I had to exit the comfortable sphere I knew and come face-to-face with my biases. There were moments cloaked in vulnerability,

enveloped in self-doubt, and tinged with discomfort. Yet, through this transformative process, I came to celebrate the unique beauty of my fragmented cultural identity and the significance of understanding and appreciating the diverse identities around me.

And my transformation didn't halt with my evolution. As I continued to grow, I recognized the capacity I had to set in motion a wave of change, to ignite a spark in others, prompting them to embark on their journeys of self-discovery and understanding. I became a fervent champion of cultural intelligence within my circle.

Today, I wear my journey of transformation as a badge of honor. It has shaped a life that resonates with meaning, influence, and change. Cultivating cultural intelligence has gifted me joy, allowing me to make peace with my fragmented identity and foster a more interconnected and unified world through CQ.

So, as I unravel the tapestry of my and others' stories before you, I invite you to embark on this journey alongside me. Not to alter who you are or what you believe but to open your eyes to the power of cultural intelligence, learn about your cultural preferences, question your biases, and revel in the beauty of human diversity.

Let's forge ahead, creating a world where everyone feels seen, heard, and cherished.



**Loren Rosario-Maldonado**  
Author - Speaker - Coach

Loren's journey has been far from ordinary. She has traveled the world for twenty-five years as a People Strategist, honing her human resources, leadership coaching, and change management expertise. At every turn, she has gained a deep understanding of how to build, grow, and scale high-performing teams. As a respected thought leader, she has dedicated her life to combining insightful perspectives with a passion for creating human-centered experiences both in and out of the workplace.

[View her website here.](#)



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# Upcoming Events

**AMA with James Garrett**  
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A sequel to Mini Habits: A Small Tool for Big  
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First  
Thursday of  
every month



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