

Autodesk Research Community: Governance Plan

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Governance and Admin Leads:

- Shari Nemerovski
- Charlene Portante
- Alex Galanter
- Rob Brantley
- Feyi Agbaje
- Erin Cotrone
- Zahra Kamal
- Kristel Valaydon
- Justin Najjar
- Sophie Lin
- Melissa Anderson

Stakeholders: Research Core Team

Metrics & Reporting

1. Metrics
 - a. Create semi-annual reports with some or all of the following metrics (note: Admins responsible for creating and using Dashboards. Reports available upon request.)
 - b. number of activities (activity metrics will include those from Recruiting/Research Projects and Member Hub postings) tracked on SmartSheets
 - c. authored by which BU
 - d. response or click-through rates
 - e. Member Hub page views and click-throughs
 - f. Community growth and distribution across industry, roles, region, etc. as needed.
 - g. Count by product for research requests
 - h. Count by location for research requests
 - i. Count by research type (survey, discussion forum, usability, interview, etc.)
 - j. Count by participant job title/work responsibility requested
2. Quality control
 - a. Metrics are a check point to ensure a good blend and variety of the target profile for research and not just adding headcount.
 - b. Centrally managed through Slack channel, Alida account access given initially as Author, then DIY training happens, then Power User permissions are given.
 - c. Only Admins can launch Community Member Recruitments
3. Meetings
 - a. Admins (as the Governance committee) to meet annually unless there is an issue that needs immediate attention.
 - b. Admins meet weekly to discuss ongoing recruitments, projects, and Community metrics
4. Semi-annual meeting on Community strategy to Research Core team to report metrics

Community Growth, Management and Awareness

1. It is each BU's responsibility to invite or load existing outside panels into the Autodesk Research Community
2. Each BU agrees to Member recruitment activity in the Autodesk Research Community on a quarterly basis. Activity can include targeting the following opportunities:
 - a. In-product recruitment e.g., call to action messaging when opening and closing software
 - b. Customer uploads e.g., customers interested in research opportunities
 - c. Sales teams e.g., Telemetry
 - d. Marketing opportunities i.e., Revit Launch, Marketo, Social Media, Product
 - e. Cross collaboration opportunities and events with partner or Member organizations within Autodesk e.g. Autodesk University
 - f. External cross collaboration opportunities with partner or Member organizations outside Autodesk e.g., Women In BIM
3. Each BU wishing to launch a Community growth campaign should coordinate with a Community Manager

4. Each BU shall review and share with Admins possible gaps detected within Community for targeting.
5. Each BU coordinates Community growth efforts so there are no doubled efforts – share in ReOps Guild meeting and submit for Growth Celebration activity and awareness drive.
6. Community Managers to organize new Member-facing welcome activities at least once a quarter.
7. Admin team to determine when to purge inactive Members due to low engagement, with a check in on the topic every three months.
 - a. The starting recommendation is every Member should be contacted at least once a month. Best practice is for Community Members to respond at least once every six months to be in good standing.
 - b. Team to send out non-participant activity every month to engage Members
 - c. Past engagement, completion of activity will be measured before purging.
8. BUs to help grow awareness of Autodesk Research Community internally within ADSK and externally by:
 - a. Advising teams of conferences and events to sponsor or attend
 - b. Promoting opportunities to showcase ARC success and continue to attract new Members i.e., internal comms like slack channels, Autodesk One, external media publications and organizations.
9. To ensure other activities taking place will not interrupt your selected Member group, Member groups can be reserved.
 - a. Only Admins have access can reserve Members for projects
 - b. Maximum limit of two weeks to reserve a group

Member Hub Management

1. Using the Community
 - a. If you're using the community, you must provide a minimum of two content pieces for smaller orgs and four for larger orgs – e.g. one research shareback and one content/engagement piece at least once a month
 - b. Teams to work with their Community Managers to help produce regular content
 - c. Teams that do not have a ReOps specialist to liaise with Community Managers for guidance.
 - d. Each shareback should be assigned to an appropriate 'collection' in the Hub and tagged appropriately. This makes searching for content on the Hub much easier. Collections sorted by Product group i.e. AutoCAD Family, BID, Construction. Hashtags on each post by specific product.
2. Calendar of Hub activity – [SmartSheet Grid View](#)

- a. Please post the activity to be published in the [hub activity calendar](#). Community Managers to review and ensure there is a healthy balance of content over the weeks.
3. Each person who uses the community is responsible for creating sharebacks content. Liaise with the Community Managers (Zahra and Kristel) if you have any further questions or queries.
 - a. Submissions through Member hub submission form to review content and track activity for reporting.
 - b. Process for consistent submissions

Toxicity

1. Calendar of research activity ([SmartSheet](#)) for all BUs to have insight into upcoming Member engagement
 - a. Calendar to be managed by the Admin team
2. Community default setting includes a 5-day toxicity filter. For exceptions, discuss in ReOps weekly meeting for transparency.
 - a. Consider a 10-day toxicity once the Community has grown large enough
 - b. All Members to receive a minimum of one (1) communication and/or invitation per month.
 - c. These “burden rules” are implemented in the platform as well
3. “Reserving sample” functionality to be used in the platform (see above)
4. Admin team to review current activity calendar/smartsheet in weekly team meeting to ensure no overlap of customer groups for upcoming requests
5. Tagging for Members who are not suitable for research – to be determined if this becomes an issue.

Customer Communication Management

1. All Member communication must be on the same logo template with standardized language and design, which you can customize for your project. These can be found in the Sharepoint site.
 - a. Invite template
 - b. Reminder template
 - c. Forum email invite template
 - d. Forum template
 - e. Usability/1:1 invite template
2. All Members are to be paid an incentive upon the completion of their live/remote research session or engagement. The amount can vary slightly based on BU preferences/budget. There are special circumstances and exceptions, please speak to an Admin.
 - a. Incentives will be emailed to Members via Tango
 - b. Aim to send incentives within 48 hours of completed session
 - c. US Government employees cannot receive incentives. We've included a text line in all invitations to ensure government employees are aware of law and have also added a government question in the PQ survey

- d. Admins actively track incentive totals to ensure no US-based participants receive \$600 or more in a calendar year.
- 3. Training for new Power Users – DIY program included
 - a. Admins are responsible for creating an appropriate training protocol
 - b. New Users must complete training before accessing the platform. Training must include at least the following:
 - i. The benefits of leveraging ARC
 - ii. The methods and expectations of recruiting via ARC, including, but not limited to: following recruiting best practices, contributing research share backs, helping to grow the Member base, and responding promptly to requests or questions from Admins
- 4. Alida Technical Support contact details, and Help Center details to be shared with new Users
 - a. [Technical Support team contact details](#)
 - b. [Help Center](#)

Training for new Admins

- 1. For advice on Community best practices, the Alida CSM is a good resource.
 - a. Hannah Forsythe: hannah.forsythe@alida.com
- 2. In addition to standard Power User Training, Admins should also receive training about:
 - a. Member recruitments
 - b. GDPR (General Data Protection Regulation)
 - c. Alida storage procedures (everything stored on the platform)
 - d. 5-year Autodesk Research Community Terms (non-disclosure agreement and consent to record)
 - e. Opt-out information and sensitive data is automatically scrubbed (sensitive data feature) 2 days after a Member's status changes to 'unsubscribed' or 'purged'.
 - f. Adding internal ADSK Users
 - g. Tango
 - h. Smartsheets

Appendix:

Salesforce Profile Variables (descriptions)

Salesforce PV	Definition
sf-accountName	Company Name
sf-accountType	Account Type (e.g. Target, Subscription, Major Account, etc.)
sf-country	Country
sf-geo	GEO
sf-listOfServiceContracts-agreementSubTypes	Subscription Level (e.g. silver/gold)
sf-listOfServiceContracts-agreementTypes	Subscription
sf-listOfServiceContracts-productLines	Products Under Subscription
sf-listOfServiceContracts-usageTypes	Usage (e.g. commercial)
sf-oxygenId	Oxygen ID
sf-parentIndustrySegment	Industry
sf-primaryAccount	Account #
sf-primaryRole	Job Role/Title
sf-siteIndustryGroup	Industry Initials (e.g. AEC, M&E, etc.)
sf-siteIndustrySegment	Industry
sf-siteIndustrySubSegment	More Detailed Industry List
sf-type	Type of Customer (e.g. end user, strategic account, reseller, etc.)
sf-userStatus	Status within their company (e.g. active, not at company, registered, etc.)

Glossary:

1. ARC = Autodesk Research Community
2. Alida = The vendor we use for managing ARC
3. BU = Business Unit, like AEC or ACS
4. Community = Autodesk Research Community
5. Community Manager = Members of the Admin team who are responsible for managing processes for tracking and reporting on Community growth, Community Engagement, and Member satisfaction
6. CRA = Customer Research Agreement (I.e., the NDA for research purposes). Also referred to as Airstream Terms
7. ReOps Guild = Cross-Autodesk Research Operations professionals
8. Member = a customer or user of Autodesk products and/or services who has joined the Community and is considered Active by having signed the CRA
9. ReOps = Research Operations
10. Research Core Team = Same as Steering Committee. These are the Heads of Research for BUs at Autodesk
11. User = An internal Autodesk employee who is given access to the ARC via the Admins

12. GDPR = The General Data Protection Regulation is a regulation in EU law on data protection and privacy in the European Union and the European Economic Area. For more information, see [Autodesk's Data Protection and Privacy](#) site.