



The CMX Summit 2026 Action Guide

Turning Insight into Action:
Practical Takeaways from the CMX Stage

Table of Contents

06 **Welcome to the Action Guide!**

Catharina Nilsson

07 **Our Incredible Emcee**

Margaux Miller

10 **Welcome to Summit**

Derek Andersen

12 **Community Is Not a Vibe: The Community Signal Engine for Scalable Growth and Impact**

Suzanne Shaw

16 **Community Isn't an Experiment. It's Infrastructure**

DeMario Bell

17 **Community Advocacy IS Earned Media—So Start Treating It Like It**

Gabrielle Herrera

20 **I Spent \$56K on Community Events and Generated \$3M in Pipeline (Here's Exactly How)**

Ed Giansante

24 **AEO Panel: Amplifying Your Community in the Age of AI**

David Kobrosky (moderator), Stephanie Quan, Logan Johnston & Caitlin Foster

Table of Contents

26	Why Cohort-Based Programs Outperform Always On Communities Paz Pisarski
28	Your Product Is a Commodity. Your Community Isn't. Act Like It Monica Rodriguez
31	Develop a Modern Local Meetup Events Strategy Brian Oblinger
36	Is the Traditional Enterprise Community Model Outdated? Derek Andersen (moderator), Richard Millington, Nisha Baxi & Jacob Gross
38	Stop Making It Easy: How Friction Creates Belonging Santiago Espinosa
43	Launch a Customer Office Hours That Drives Adoption (This Monday) Alex Jorgenson
44	Community-Led Growth Was a Useful Start. It's Not Enough Anymore Josh Zerkel

Table of Contents

48 **Small Team. Big Mission. How Sandboxx Uses AI Agents to Support Military Families at Scale**
Bethany Joy Clark

50 **Your Community Metrics Are Lying (And AI is Why)**
Anuj Adhiya

55 **The Dawn of the AI Builder**
Marily Nika and Derek Andersen

58 **Build Your Standout Skillset: Patterns to Steal From the Best Community Leaders**
Jon Wishart

60 **AI-Ready Communities: Turning Your Community into a Knowledge Goldmine**
Richard Millington

65 **Stop Designing Your Events for Instagrammable Moments: Measure for Return, Not Registrations**
Jessie Jacob

68 **Your Community Isn't an Engagement Tool—It's a Trust Engine**
Vero Heino

71 **Rejection is Redirection: Build the Role You Want**
Guilda Hilaire

Table of Contents

74 **Bonus Content: Renaissance Minds: The Hidden Power of Community Managers**
Avital Knoller

76 **Bonus Content: Unconference**
All Attendees

79 **Bonus Content: CCIA Ceremony**
The Winners of the CCIA's

81 **Thank you!**



Welcome to the Action Guide!

Last year, the Action Guide was born from a simple idea: what if attendees had a workbook to carry all their learnings with them after the event? The response blew us away, and we knew we had to bring it back.

CMX Summit has always been about more than great content. It's a place for genuine connection, career-defining conversations, and the kind of "aha!" moments that actually change how you work. The Action Guide is part of how we extend that beyond the two days we spend together.

This year, you'll notice one difference: we didn't record sessions and only *some* slide decks are included. Many of our speakers shared sensitive data, real numbers, and candid insights they felt comfortable sharing in the room, and we wanted to protect that. What we did make sure of is that every speaker's actionable resources, frameworks, and worksheets are captured right here, so you still walk away with everything you need to put their ideas into practice.

Whether you were with us at the Fox Theatre in Redwood City or are diving in after the fact, this guide is yours. Use it!

CMX Summit 2026 may be over, but the magic never ends at CMX! Make sure you get your tickets to **CMX Summit 2027!**

Thanks for showing up, sharing generously, and continuing to shape the future of our industry. See you in the CMX Community!



Catharina Nilsson

Catharina Nilsson
Community & Growth Lead
CMX/Bevy

Margaux Miller

Emcee

Global MC & Moderator | Connection Expert

Margaux Miller is a dynamic speaker, moderator, and event host known for her vibrant energy and business acumen in tech, startups, innovation, and community. Her engaging style and ability to distill complex topics helps to drive meaningful conversations and deliver content that resonates deeply with an international audience.

[Connect with Margaux on LinkedIn](#)

[Watch Margaux's TEDx Talk](#)



The One Conversation Worth Multiplying

Before you do anything else, write this down while it's fresh.

The conversation that stuck with me most at CMX Summit 2026:

Person: _____

What we talked about: _____

The insight I'm still thinking about: _____

Who else needs to hear this: _____

That last line is the whole point. One conversation doesn't have to stay between two people. The best thing that came out of CMX Summit this year can travel—to your team, your network, your community, and people who weren't even in the room.

Here's how to make that happen:

The One to Many Method: Turn Your Best CMX Conversation Into Something Bigger

You made real connections at CMX Summit. This guide helps you make sure those connections don't just live in your notes app. Use these five moves to take the good conversation and compound it.

Margaux Miller

1. Follow Up Fast, And Make It Specific

The window is short. A message sent within 48 hours lands completely differently than one sent two weeks later.

Don't just say "great to meet you." Reference something real.

💡 Prompt: "It was great talking with you about [specific topic] - the way you framed [idea] is something I keep thinking about. I'd love to stay in touch and hear how you're moving forward with it."

Send it to: _____

2. Make the Introduction

Think about who you met at CMX and who in your existing network would benefit from knowing them. A well-placed intro is one of the highest-value things you can do for two people at once - and it makes you memorable to both.

💡 Prompt: "[Name A], meet [Name B]. You're both working on [shared challenge or interest]. I think you'd have a lot to talk about - I'll leave the rest to you two."

The intro I want to make: _____ meets _____

3. Bring the Insight Back to Your Team

The best sessions shouldn't stay at the event. Pick one idea from CMX Summit that your team actually needs to hear - and share it this week.

It doesn't have to be a big presentation. A Slack message, a team meeting shoutout, or a forwarded resource all count.

💡 Prompt: "I heard something at CMX last week that I think applies directly to what we're working on. [Insight]. Here's why I think it matters for us: [your take]."

The insight I'm bringing back: _____

Who I'm sharing it with: _____

Margaux Miller

4. Post It, And Name the Source

Sharing a takeaway publicly does two things: it extends the value of the conversation to your whole network, and it gives the person you talked with real, visible credit. That's a relationship-builder disguised as a LinkedIn post.

💡 Prompt: "At CMX Summit this week, [Name] said something that stopped me: '[quote or paraphrase]'. Here's why I think it matters beyond just community: [your take]. Tag someone who needs to hear this."

What I want to post about: _____

5. Reach Someone Who Wasn't There

Think of one person outside CMX - a colleague, a founder you know, a friend in a different industry - who would have gotten real value from something you heard this week. Send it to them directly, with context.

This is how insights travel. And it usually starts a conversation you didn't expect.

💡 Prompt: "You weren't at CMX Summit but this came up in a session and it made me think of you immediately: [insight or resource]. Thought it was worth passing along."

The person I'm sending this to: _____

What I'm sending: _____

Why This Works

Most post-event follow-up dies in a to-do list. The One to Many Method works because it's built around one conversation - not a list of 50 names you half-remember. Start with the moment that actually stayed with you. Then let it travel.

One good conversation, compounded, is worth more than a hundred half-hearted follows. That's what community professionals already know better than anyone. Now go prove it.

Welcome to Summit: Community, AI and the Most Valuable Skill Left in Tech

Keynote

Speaker: Derek Andersen

Derek Andersen opened CMX Summit 2026 by exploring how AI is reshaping product development, and what that means for community.

As builders become increasingly AI-led and further from the customer conversation, he argued that community professionals now sit as the critical connective tissue between technology and the humans who want to feel heard.

He closed with a rallying call: the ability to build real connection is one of the scarcest skills left in tech, and if the industry grows the market and embraces AI-native ways of working, everyone in that room becomes a unicorn.

[Check Out the Session Slides](#)

Derek Andersen

Co-Founder and CEO of Bevy

Derek Andersen is a seasoned community builder with 15+ years of experience connecting people and powering networks.

He is the co-founder and CEO of Bevy, a SaaS platform helping companies like Salesforce, Atlassian, Google, Snowflake, and Adobe build thriving virtual and in-person communities, backed by \$60M from Accel, Upfront Ventures, and others.

Derek also co-founded Startup Grind, a global network of 600 chapters in 125 countries, hosting over 20,000 events to educate and inspire founders. Previously, he co-founded CommonRed (acquired by Income.com) and worked as a product manager at Electronic Arts.



[Connect with Derek on LinkedIn](#)

[Bevy](#)

[Divot](#)

Derek Andersen

Turning Insight Into Action

Derek's keynote was a call to action for the community industry.

Here are a few reflection questions to determine your path forward:

Question	Notes
<p>Where does community actually sit in your org? Is it embedded in how your company drives adoption, retention, and revenue, or is it operating as a parallel function that rarely shows up where decisions get made?</p>	
<p>Are you making the scarcity argument? The ability to build genuine human connection is one of the most valuable and hardest-to-replicate skills in tech right now. Are you using that language internally, and advocating for what that's actually worth?</p>	
<p>Are you positioning yourself as the connective tissue? As product and engineering become increasingly AI-led, someone has to bridge the gap between fast-moving builders and customers who want to feel heard. Are you framing your work that way?</p>	
<p>Where could AI be taking things off your plate? AI won't replace community builders, but it will multiply what one person can do. What parts of your workflow are routine and time-consuming enough to hand off?</p>	
<p>Are you growing the market, or just your program? The biggest opportunity for the community industry isn't fighting over existing budgets. How are you bringing more companies into community-first thinking beyond your own four walls?</p>	

Community Is Not a Vibe: The Community Signal Engine for Scalable Growth and Impact

Keynote

Speaker: Suzanne Shaw

In this keynote, Suzanne Shaw introduced The Community Signal Engine — a framework that turns engagement into intelligence, intelligence into alignment, and alignment into measurable growth.

Drawing from experience across sales, product, operations, and GTM leadership, she showed how AI can surface the hidden signals inside community conversations: expansion opportunities, retention risk, and innovation accelerators hiding in plain sight.

This session challenged leaders to stop positioning community as a support function — and start treating it as a strategic growth engine.

Suzanne Shaw

Director, Community & Field Readiness at LogicMonitor

Suzanne is a growth strategist. She is currently Director of Community & Field Readiness at LogicMonitor, leading community and GTM enablement initiatives. A former quota-carrying sales leader, she brings a revenue-first mindset to community strategy, transforming engagement into measurable business impact.

She has created The Community Signal Engine, a framework that converts participation into growth signals, executive alignment, and commercial outcomes. She builds cross-functional partnerships across Customer, Product, Marketing, and GTMOps to drive retention, expansion, and innovation.

Outside of work, she enjoys her mountain life with her husband, grown children, a dog named Goose and a goat named Rooster (plus a few others.)



[Connect with Suzanne on LinkedIn](#)

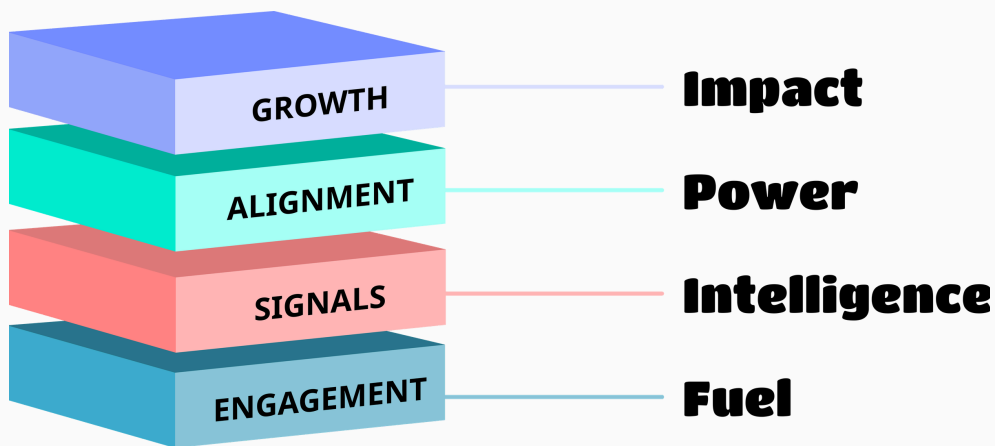
Suzanne Shaw

Turning Insight Into Action

The Community Signal Engine

Overview

Most community teams measure engagement, but high-performing teams translate that engagement into signals, alignment, and measurable growth. This workbook is designed to help you turn everyday community interactions into tangible business impact.



Part 1: Signal Engine Self-Assessment

Rate your community program on a scale of 1 (Low) to 5 (High) to identify where you are strongest and where you are stalled.

Layer	Question	Score (1-5)
Connection	Are we driving meaningful engagement?	
Signal	Are we capturing insights from interactions?	
Alignment	Are insights shared across teams?	
Metrics	Are we tracking business outcomes?	

Part 2: Identify Your Signals

Map your specific community interactions to the impact they have on the business.

Signal (Interaction)	What It Indicates	Who Needs This?
Example: Feature Request	Product Gap / High Intent	Product Team

Part 3: Build Alignment

Community does not exist in a vacuum. Use this table to map how your signals support other departments. [cite: 19]

Department	What do they care about most?	How can community signals support them?
Product		
Marketing		
Sales / GTM		
Customer Success		
Product		

Part 4: Define Your Metrics

Set your baseline and targets for the business outcomes that matter most to leadership.

Metric	Current Baseline	6-Month Target
Pipeline Influenced		
Revenue Influenced		
Retention Rate		
Product Adoption		

Part 5: 30-Day Action Plan

Break down your implementation into actionable steps for the next month.

- Connection:** (e.g., Audit top 3 engagement types)
- Signal:** (e.g., Create a tracking system for specific insights)
- Alignment:** (e.g., Schedule a meeting with one cross-functional lead)
- Metrics:** (e.g., Define the 'Defensible Metric' to track today)

Part 6: Reflection Questions

- What signals are we currently missing?
- Are we reporting activity (likes/posts) or outcomes (revenue/retention)?
- What would our executives care about most right now?
- What is the one metric we can defend with data today?



Remember: Engagement is just the start!
Engagement **FUELS** connection
Signals create **INTELLIGENCE**
Alignment generates **POWER**
That power drives growth = **IMPACT**

Suzanne on stage at CMX Summit 2026

Community Isn't an Experiment. It's Infrastructure

Hot Take

Speaker: DeMario Bell

We've been debating how to "prove community ROI" for years — and yet many leaders still find themselves justifying their existence. That's not a measurement problem. It's a positioning problem.

In this candid hot take, DeMario Bell challenged the industry to stop treating community like a program and start building it as GTM infrastructure. He shared why so many roles get stuck in executor mode, how to create healthy strategic tension with leadership, and what it actually takes to operate as an advisor — not just an operator.

Drawing from real experience aligning community to executive priorities at scale, this session offered a practical blueprint for moving from experiment to influence.

DeMario Bell

Senior Community Manager at Amazon Web Services (AWS)

DeMario Bell is a community strategist and builder with over a decade of experience scaling communities across higher education, startups, and global enterprise.

He leads North America Community Strategy on the Developer Experience team at Amazon Web Services (AWS), partnering cross-functionally to grow developer-led programs and strengthen advocacy. He is also the Founder of Gatherful, an advisory practice focused on community-led growth and belonging.

Previously, DeMario co-led the Culture First Community at Culture Amp, growing it to more than 100,000 members and influencing millions in revenue. He was named LinkedIn's Top Community Voice and CMX's Best B2B Community Professional.



[Connect with DeMario on LinkedIn](#)

Community Advocacy IS Earned Media — So Start Treating It Like It

Hot Take

Speaker: Gabrielle Herrera

Community advocacy is earned media. We've just been too humble to say it out loud.

As the line between social and community kept blurring, advocates were out there driving reach, shaping brand perception, and building trust that paid teams spend millions trying to replicate — and we were reporting it in Slack.

This session was a direct challenge to community practitioners to stop translating their results into feel-good metrics and start speaking the language that actually moves budgets and resources. Your program is already doing the work. The question is whether leadership can see it.

Gabrielle Herrera

Sr. Marketing Manager for Community Growth At HubSpot

Gabrielle Herrera is the Senior Marketing Manager for Community Growth at HubSpot, where she builds customer advocacy programs that turn real relationships into real business impact.

She has a knack for helping customers find their voice — spotlighting established advocates and emerging perspectives alike. With a background spanning B2B SaaS, cybersecurity, nonprofits, and private medicine, she's seen firsthand that in a marketing landscape increasingly driven by AI, the content buyers actually trust still comes from people like them.



[Connect with Gabrielle on LinkedIn](#)

Gabrielle Herrera

Turning Insight Into Action

The Advocacy Audit: Are You Speaking Leadership's Language?

The problem isn't your program's performance. It's translation. Use this worksheet to audit how you're currently reporting your advocacy results — and identify exactly where the language gap is costing you.

Part 1: Where Does Your Advocacy Live?

Think about your last advocacy report, recap, or leadership update. Where did it land?

- Slack channel shout-out
- Internal newsletter
- Quarterly business review (QBR)
- Board deck or executive summary
- It didn't get formally reported

Reflection: If your results ended up in Slack instead of a board deck, ask yourself — was that a performance problem, or a framing problem?

Part 2: The Translation Check

For each metric you currently track, fill in how you're reporting it today — then translate it into earned media language.

What You're Tracking	How You Report It Today	Media Translation
Community activity / engagement		
Sentiment or member feedback		
Advocate participation / UGC		
Event attendance or reach		
Forum activity / support interactions		
Other: _____		

Ask yourself: Which version would get a line item in your next leadership meeting?

Part 3: Your Next Action

What's one thing you'll do differently in your next advocacy report?

Who needs to see it?

What's the media equivalent of your biggest result from last quarter?



Gabrielle on stage at CMX Summit 2026

I Spent \$56K on Community Events and Generated \$3M in Pipeline (Here's Exactly How)

Keynote

Speaker: Ed Giansante

In 2023, it started with scrappy meetups and free pizza just to get people in the room. Fast forward 18 months: 86 events, 2K+ attendees, and \$3M in pipeline influence — all while being a team of one.

This talk broke down the exact playbook Ed used to transform community events from a "nice-to-have" into a scalable revenue engine generating over \$50 for every dollar invested. He shared his processes for AI-powered event operations, how he curated VIP experiences that convert, and the tracking framework that finally proved community ROI to the executive team.



Ed on stage at CMX Summit 2026

Ed Giansante

Head of Community at Persona

Ed Giansante is an award-winning community leader with 12+ years of experience building and scaling global online communities. Formerly Global Head of Community at Dropbox and Wix.com, he was named Community Professional of the Year 2020 at the CMX Awards.



[Connect with Ed on LinkedIn](#)

[Join Ed's Community](#)

Ed Giansante

Turning Insight Into Action

The Community ROI Starter Kit

This toolkit helps community managers transform events from feel-good networking into measurable revenue drivers. Starting with business fundamentals — ICP, LTV, CAC — it walks through an AI-powered workflow for running a high-ROI event with just 12 carefully selected guests.

The strategic guest list formula and post-event tracking system give practitioners a clear way to demonstrate pipeline attribution to leadership and protect their budgets — even as a team of one.

The 4 Pillars: \$60 Return Per \$1 Invested

AI-Powered Ops

Automate admin, personalize at scale

VIP Experience

Premium > volume, curate ruthlessly

Ruthless Tracking

Prove ROI or lose your budget

Sales Partnership

Intelligence + warm intros = layups

Know Your Numbers First:

Your ICP: Title _____ Industry _____ Stage _____

Your Product LTV: \$ _____

Your Current CAC: \$ _____ (Can community beat this?)

Sales Cycle Length: _____ days

Ed Giansante

Turning Insight Into Action

Guest List Formula

1) 4 Customers

Advocates who share insights

2) 4 Prospects

High-intent, in your ICP, active buying

3) 4 Ecosystem

VCs, partners, thought leaders

The Workflow

Pre-Event

- Research attendees on LinkedIn → pain points, recent news
- Ask ChatGPT: "Who should sit together based on this list?"
- Create strategic seating chart

During Event

- Take voice notes: "Sarah + Marcus discussed fraud prevention"
- Note who connected and what pain points emerged

Post Event

- Upload notes to ChatGPT → generate personalized follow-ups
- Edit AI drafts to sound like YOU
- Tag attendees in CRM with event name + conversation context
- Brief sales: "[Name] mentioned evaluating solutions in Q1"

Track

Set 90-day reminder: **Did attendees become opportunities?**

Ed Giansante

Turning Insight Into Action

BEFORE YOUR NEXT EVENT, ASK:

“If I could only invite 12 people who would drive \$50K in pipeline, who would they be and why?”

Name	Why

! Now build your event around **THEM**, not a random crowd.

Track Your First Win

Event: _____ Date: _____ Attendees: _____

Opportunities: _____ Pipeline: \$ _____ Budget: \$ _____ ROI: \$ _____

Recommended Stack

 LUMA

 ChatGPT / Claude

 Your CRM

 LinkedIn

“A generous person will prosper, whoever refreshes others will be refreshed”

Proverbs 11:25

AEO Panel: Amplifying Your Community in the Age of AI

Panel

Speakers: Stephanie Quan, Logan Johnston, Caitlin Foster and David Kobrosky (moderator)

AI is changing how content is discovered, shared, and valued — but what does that mean for community leaders? This panel dived into actionable strategies for making your community and its members more discoverable in an AI-driven world.

Speakers explored what to focus on, from content structuring to engagement tactics, to ensure community impact and influence extend far beyond the platform.

Stephanie Quan

Marketing Manager, ModLab at Reddit

Stephanie Quan is part of the Community team at Reddit, creating programs that champion and empower Reddit's global moderator community.

[Connect with Stephanie on LinkedIn](#)



Caitlin Foster

Head of Experience League, Community Engagement at Adobe

Caitlin is leading the vision, strategy and team executing the new customer retention marketing function, focusing on delivering digital and scaled value realization to decision makers and leaders across all Adobe Marketing solutions.

[Connect with Caitlin on LinkedIn](#)



Logan Johnston

Head of Community (Researcher Relations) at Protege

Logan Johnston is a community and growth leader who spent seven years at Meta building and scaling global AI and creator programs, and now leads community for AI researchers at Protege.



[Connect with Logan on LinkedIn](#)

David Kobrosky

Product Manager at Bevy

David Kobrosky grew up north of Boston and studied Computer Science at the University of Michigan before leaving at 19 to build community engagement products for Gary Vaynerchuk. He later worked as an engineer and product manager at DataRobot and 1Password. At 21, David founded Intros AI, backed by Neo and operators from OpenAI, Figma, HubSpot, and Ramp, serving clients like Morning Brew and Squarespace. In the summer of 2025, he sold Intros AI to Bevy Labs, where he now leads AI and GTM initiatives, driving innovation at the intersection of community, technology, and growth.



[Connect with David on LinkedIn](#)



The AEO panel on stage at CMX Summit 2026

Why Cohort Based Programs Outperform Always On Communities

Hot Take

Speaker: Paz Pisarski

Always-on communities are built for access. Cohort-based programs are built for outcomes. The problem is most communities are designed for the first, while being asked to deliver the second.

Drawing from experience building and scaling programs at companies including Canva and Google, Paz shared a consistent pattern: always-on communities are great at providing content, but cohort-based programs are where transformation happens at scale. When you introduce a defined start and end date, shared goals, and a group of humans moving through the same experience together, something shifts — friendships deepen, accountability increases, and results become measurable.

This session offered a practical framework for stealing the best tactics from cohort models and applying them to what you're already doing.

Paz Pisarski

Co-Founder of The Community Collective

Paz is the Co-Founder of The Community Collective, a 17-person Melbourne meetup turned global movement with a 17.8k+ audience & 700+ community across 18 countries after accidentally going viral in 2021.

She's trained 320+ businesses in community-led growth including industry leaders Canva, Google and MYOB, while speaking internationally in London, Sydney & San Francisco and interviewing community legends such as Seth Godin and Steph Claire-Smith.

When not building community, you'll find her living in the Surf Coast, wearing orange, playing classical guitar and composing relaxation music for her music brand Paz Sounds, which recently hit 10 million streams.



[Connect with Paz on LinkedIn](#)

[The Community Collective](#)

Paz Pisarski

Turning Insight Into Action

Membership communities are designed for access. Cohorts are designed for transformation.

Use this template to audit your existing community and embed the best elements of a cohort model.

COHORT Framework

C — Container

Who is this for? Define the edges of your community with precision.

O — Obligation

What creates accountability? Deadlines and skin in the game drive commitment.

H — Heart

How do you build deep connection? Contacts vs. friends for life. Design for depth.

O — Outcomes

What do members walk away with? Members don't join for content. They join for transformation.

R — Rhythm

What is the cadence? Rhythm creates habits. Habits create momentum. Momentum creates belonging.

T — Transformation

How do you measure the change? You enter one person. You leave a different one.

[Access the Full Cohort Framework Template](#)



Paz on stage at CMX Summit 2026

Your Product is a Commodity. Your Community Isn't. Act Like It

Hot Take

Speaker: Monica Rodriguez

In a market where competitors can replicate your features, match your pricing, and outspend your ads, community is often positioned as the ultimate differentiator. But most community programs aren't actually defensible — because they're not designed to be.

In this hot take, Monica Rodriguez challenged community leaders to rethink how they build and operationalize their programs. Drawing from her experience evolving HoneyBook's Pros program, she explored why many communities fail to create real competitive advantage, what it takes to turn members into true partners, and how leading organizations are building ecosystems that competitors can't replicate.

Monica Rodriguez

Community and Partner Manager at HoneyBook

Monica Rodriguez is a community strategist and partnerships leader at HoneyBook, where she drives member activation, ecosystem growth, and partner programs for one of the leading platforms for independent business owners.

With a background spanning community management, engagement marketing, and member-led strategy, she specializes in turning passionate users into invested partners — and community programs into competitive advantages.

Monica believes that the most defensible thing a business can build is trust, and that most companies are sitting on that asset without knowing it. She is based in San Francisco.



[Connect with Monica on LinkedIn](#)

Monica Rodriguez

Turning Insight Into Action

Most community programs feel defensible. Few actually are. Score yourself honestly.

The Defensibility Audit helps community leaders diagnose whether their program creates real switching costs or just the illusion of them.

Use Part 1 to score your program honestly across seven indicators of true partnership. Use Part 2 to understand where you land: subscriber-level, building, or partner-level.

The reflection questions push you toward your first concrete next step.

You'll leave knowing exactly where your community is extracting value instead of creating it — and what to change first.

Score each statement [1 = Not true] [2 = Somewhat true] [3 = Fully true]

PART 1 · SERVING OR PARTNERING?

My members have real influence over our product — not just a feedback form.	
My members' success metrics are tracked alongside our company metrics.	
My team has named relationships with our top members (they know each other).	
We share internal information with members that we don't share publicly.	
When we go quiet, members notice and reach out — not the other way around.	
Members have recruited others into the community without being asked.	
If our community disappeared tomorrow, members would lose something they can't find elsewhere.	

Total Score: _____ / 21

PART 2 · SCORE YOUR MOAT

07-11

Subscriber-level.

Members are engaged but not invested. High switching risk.

12-16

Building.

You have the foundation. Go deeper with your top members.

17-21

Partner-level.

You're building something genuinely hard to replicate.

Reflection Questions

Ready to build a community that competitors can't copy? Use these to move from insight to action.

Who are the 10 members already showing up like partners?

Contributing, recruiting, defending without being asked. Write their names down.

What could you give them this month that goes beyond content or perks?

Think: real access, influence over a decision, or public visibility.

What metric is your boss asking for that keeps your program at the surface level?

What would you measure instead if you could? What does partner-depth actually look like?

If your community disappeared tomorrow, what would your members actually lose?

Be honest. If the answer is 'a Slack group and some webinars,' that's your work.

Build toward the answer you want.

Develop a Modern Local Meetups Events Strategy

Workshop

Speaker: Brian Oblinger

Collaborative local meetups are so back.

In this hands-on workshop, Brian guided attendees through frameworks, processes, and learnings to develop successful, scalable, and sustainable meetup programs.

Attendees walked away with the beginnings of a strategy to deliver real value to their community and organization — covering everything from what makes local events scale, to enlisting passionate members, to measuring success and justifying ROI.

Brian Oblinger

Community Strategy Consultant

Brian Oblinger helps brands engage their customers to increase satisfaction, lower costs, and generate more revenue through the power of community.

He's recently worked with Airbnb, Docusign, Greenhouse, Hubspot, Techstars, and many more. Brian is also the co-host of In Before The Lock podcast and the founder of Community Strategy Academy.



[Connect with Brian on LinkedIn](#)

[Brian's Website](#)

[Community Strategy Academy](#)

[In Before the Lock Podcast](#)

Brian Oblinger

Turning Insight Into Action

Never built a local meetup program? No problem.

This framework will serve as a starting point to build the foundation of your first local meetup. You'll set strategic objectives, target a specific audience, build an agenda, and build a path to clear outcome measurement.

EVENT BRIEF

01. Details	
Event Name / Page	
Date / Time	
Location / Platform	
Local Leader(s)	
Program Manager	

02. Strategic Objectives	
What business outcomes are we supporting?	
What member needs are we fulfilling?	
How will we know it worked?	

Brian Oblinger

Turning Insight Into Action

03. Audience	
Customer Segment(s)	
Geographic Market	
Targeted Accounts	

04. Agenda		
Time	Format	Owner
6:00 PM		
6:05 PM		
6:30 PM		
7:00 PM		
8:00 PM		

05. Contributors		
Team	Role	Owner

Brian Oblinger

Turning Insight Into Action

06. Success Metrics
Program Health
Engagement Impact
Business Outcomes



Brian on stage at CMX Summit 2026

Debate: Is the Traditional Enterprise Community Model Outdated?

Debate

Speakers: Richard Millington, Nisha Baxi, Jacob Gross and Derek Andersen (moderator)

Richard Millington, Nisha Baxi, and Jacob Gross took the stage for one of Summit's most charged sessions: a live debate moderated by Derek Andersen on whether the traditional enterprise community model has run its course.

The three debaters argued the merits and limits of conventional approaches, challenged long-held assumptions, and pushed each other on what it actually takes to build community programs that drive real business impact in 2026 and beyond. It was the kind of conversation the industry needed to have out loud.

Richard Millington

Founder of FeverBee

Richard Millington is the founder of FeverBee, a community consultancy, and author of 'Build Your Community' (Pearson, 2021) Over the past 15 years, Richard has helped 320+ organisations, including Apple, Meta, Microsoft, Google, The World Bank, and SAP use powerful psychology to build thriving communities. Through his community management academy, he has also trained 1450 of the world's top community pros.



[Connect with Richard on LinkedIn](#)

Nisha Baxi

Head of Community at Gong

Nisha Baxi is a community and customer experience leader at Gong, where she built the Visioneer Community into a thriving space for customers to connect, learn, and share how they're using AI in their day-to-day work. She has led community and go-to-market programs across Salesforce, Facebook, and Monte Carlo, with a focus on turning real customer experiences into insights that shape products and drive growth.



[Connect with Nisha on LinkedIn](#)

Jacob Gross

Senior Program Manager, Digital Community at Vanta

Jacob leads Digital Community at Vanta, the trust management platform that helps businesses earn and prove trust by automating security, compliance, and risk workflows, with AI helping accelerate and scale that trust.

Before Vanta, Jacob led Community at Slack, a Salesforce company, and also spent some time at a couple startups managing Community. In a prior life, he worked in higher education, supporting students with their study abroad plans. Jacob is based in Chicago (go Cubs!), is often managed by his dog Walter, and enjoys spending time outside, going for runs, and catching up on the latest Survivor episode.



[Connect with Jacob on LinkedIn](#)

Derek Andersen

CEO & Co-Founder at Bevy

Derek Andersen is a seasoned community builder with 15+ years of experience connecting people and powering networks.

He is the co-founder and CEO of Bevy, a SaaS platform helping companies like Salesforce, Atlassian, Google, Snowflake, and Adobe build thriving virtual and in-person communities, backed by \$60M from Accel, Upfront Ventures, and others.

Derek also co-founded Startup Grind, a global network of 600 chapters in 125 countries, hosting over 20,000 events to educate and inspire founders. Previously, he co-founded CommonRed (acquired by Income.com) and worked as a product manager at Electronic Arts.



[Connect with Derek on LinkedIn](#)

Stop Making It Easy: How Friction Creates Belonging

Hot Take

Speaker: Santiago Espinosa

In this hot take, Santiago challenged one of the tech industry's core assumptions: that frictionless equals good.

Drawing on research from Oxford anthropologist Tamas David-Barrett and a real case study from MUTUO's work with a wellness brand in Mexico, he showed how intentionally adding friction led to 1,000% more engagement and transformed a dead community into a thriving one, leaving attendees with a powerful question to take back to their own communities.

[Check Out the Session Slides](#)

Santiago Espinosa

Co-Founder at MUTUO

Santiago Espinosa is Co-Founder & CEO of MUTUO, Latin America's first strategic community design firm, and Co-Founder of The State of Communities, an industry initiative professionalizing community building across LATAM, Spain, and Portugal.

He leads the CMX Mexico City Chapter and served as a judge for the CMX Awards 2026. MUTUO has designed 50+ communities impacting over 300,000 members. His path to this work is personal; a community transformed his life, and he's spent the years since proving that belonging can be designed. His upcoming book explores the Human-First approach in the AI era.



[Connect with Santiago on LinkedIn](#)

[MUTUO's LinkedIn Page](#)

Santiago Espinosa

Turning Insight Into Action

37 Ways to Add Friction (and Create Belonging)

Every community builder has heard the advice: make it easy to join, remove every barrier, reduce friction at all costs.

Some of the best communities we've worked with do the opposite.

What follows are 37 real examples of intentional friction designed into communities across Latin America — drawn from MUTUO's work with 50+ organizations. No brand names (NDAs), no metrics, no case studies. Just the friction itself. The specific thing that was asked of members. The barrier that became the bridge.

Take this as inspiration. Scan the list when you're designing onboarding, rethinking membership criteria, or wondering why engagement feels flat. Each example is intended to make you think: **what if the thing you're removing is the thing that makes people stay?** No framework to follow. Just proof that friction, designed well, creates belonging.

1. A wellness community requires every applicant to answer one question: "What are you willing to change?" Applications under two sentences are automatically declined.
2. An investor community charges a refundable \$200 USD deposit that members only get back after attending their first three events.
3. A personal development community for executives doesn't accept anyone who applies within 24 hours of discovering the community. There's a mandatory 72-hour reflection period before the application opens.
4. A pet owners' community asks new members to record a 30-second voice note introducing their pet — in the pet's imaginary voice.
5. A community for landscape architects requires applicants to submit three photos of projects they're inspired by. Not to judge quality — to see if they care enough to curate.
6. A community for HR leaders at mid-to-large companies requires every new member to be vouched for by an existing one.
7. A book authors' community asks prospective members to read a specific chapter of another member's book and share one honest reaction before joining.

Santiago Espinosa

Turning Insight Into Action

8. A high-end fitness studio makes prospects wait 60 days after their first inquiry before they can join. If you come back, you're ready.
9. A community for education marketing professionals requires every new member to share their biggest professional failure in their first week.
10. A wealth management community requires a live 15-minute video call with the founder before granting access.
11. A speakers' and facilitators' community only opens enrollment twice a year. Miss the window, wait six months. They've solved their retention problem.
12. A community for women in board-level positions requires new members to write a one-paragraph letter to their 25-year-old selves. It's shared anonymously with the group before the member joins. The group decides if she's invited.
13. A ground logistics community requires every member to document one real problem they faced on the road that week and post it to the group before the Friday call. No venting allowed — only problems framed as "here's what I'd try differently." The group is known to be a living ops manual.
14. A wellness conference community charges a non-refundable "commitment fee" that covers nothing. It's not a ticket. It's not a deposit. It's a declaration that you'll show up and participate.
15. A community for retail professionals requires members to conduct a "mystery shop" at a competitor and submit a one-page reflection.
16. A personal transformation community doesn't allow members to use their professional title for the first 90 days. No "CEO." No "Director." First name only.
17. A community for high-performance athletes requires applicants to submit a video or written testimony of themselves failing at something.
18. A gut health and lifestyle community requires every member to complete a 7-day food journal before being granted access to the group. No journal, no entry. The journal itself becomes the first transformation.
19. An investing community asks new members to publicly commit to one financial goal in their first event. Something specific. Something scary.

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- 20.** A community for marketing agencies requires every new member to share one honest lesson from a campaign that underperformed. The shared library isn't built on best practices. It's built on what didn't work and why.
- 21.** A community for education professionals holds its application open for only 48 hours per quarter. They announce it once. No countdown timers. No "last chance" emails. You either pay attention, or you don't.
- 22.** A pet-friendly brand community requires every member to attend one in-person event within their first 60 days. Virtual members don't exist. If there's no event near you, you wait until there is one.
- 23.** A community for startup founders requires each applicant to record a 2-minute video explaining why they want to join — but they can't mention their company, product, or revenue. Only personal motivation.
- 24.** A wellness community assigns every new member a "first friend" — another member who's been there for at least six months. You can't access the full community until your first friend says you're ready.
- 25.** A community for supply chain leaders requires members to share one unpopular opinion about their industry during onboarding. Not a hot take for social media. Something they'd hesitate to say at a conference.
- 26.** A fitness community requires new members to train with a current member for their first two sessions.
- 27.** A community for consumer brand founders won't accept members with fewer than 100 customers. Not 100,000 followers. 100 people who paid.
- 28.** A personal development community requires every member to handwrite a letter to the community explaining what they hope to give — not get. The letters are displayed on the community platform.
- 29.** An investor community won't let members access the deal flow channel until they've attended four consecutive monthly gatherings.
- 30.** A conference community for wellness professionals requires attendees to arrive the night before and share a meal with strangers.

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- 31.** A community for speakers requires every new member to give a 5-minute talk to the existing members within their first month.
- 32.** A community for landscape and design professionals requires applicants to bring a physical object to their first gathering that represents their design philosophy.
- 33.** A community for HR entry-level professionals charges nothing to join but requires 4 hours per month of peer mentoring to stay.
- 34.** A community for retail executives requires each member to sponsor one junior professional's membership.
- 35.** A community for book authors requires every member to read one other member's full manuscript per year and provide written feedback.
- 36.** A community for high-performance athletes requires new members to share their recovery story — what happens after the podium.
- 37.** A community for education marketing leaders requires a "reverse interview" — where three current members interview the applicant, then the applicant interviews them. Both sides must say yes.

You can see the pattern.

When you ask more of people before they enter, they bring more of themselves once they're in. Friction isn't the enemy of belonging. It's the base of it.

The question isn't whether to add friction. It's where.



Santiago on stage at CMX Summit 2026

Launch a Customer Office Hours That Drives Adoption (This Monday)

Hot Take

Speaker: Alex Jorgenson

In this hot take, Alex made the case for a simple but powerful shift: stop performing for your customers, and start facilitating with them.

She walked through how a lightweight Office Hours program turned passive audiences into active participants by creating space for real conversation anchored in behaviors customers already trust. No complex strategy, no heavy lift — just a practical, repeatable way to drive meaningful engagement, fast.



Alex on stage at CMX Summit 2026

Alex Jorgenson

Community Manager at Collibra

Alex "AJ" Jorgenson is a Community Manager at Collibra, where she brings customers together through forums, user groups, live events, and shared learning experiences. She focuses on making the community feel easy, valuable, and actually fun—helping teams turn everyday moments into real adoption and impact.



[Connect with Alex on LinkedIn](#)

Community-Led Growth Was a Useful Start. It's Not Enough Anymore

Keynote

Speaker: Josh Zerkel

In this keynote, Josh challenged the current framing of community-led growth and explored what changes when community is designed directly into the go-to-market system.

He made the case that while CLG raised expectations for what community could do, it didn't change how most companies actually run — leaving community operating as a parallel system rather than a core driver of adoption, retention, and revenue.

Attendees walked away with a sharper lens on where most approaches to proving impact break down, and what it looks like when community is built into GTM from the start.

Josh Zerkel

Head of Marketing and Community at Gradual

Joshua Zerkel, CPO® is a community and go-to-market leader with more than twenty years of experience building and scaling community-driven systems.

He currently leads Marketing and Community at Gradual, where he focuses on embedding community into go-to-market strategy and operations. Joshua has led global community and education programs at Asana, Evernote, CBS News, and HeyGen, connecting community to product, marketing, and customer outcomes.

He also advises companies on integrating community across the customer lifecycle. He writes and speaks about community as a structural component of modern business through *The Community Code*.



[Connect with Josh on LinkedIn](#)

[Josh's Substack](#)

[Buy *The Community Code*](#)

Josh Zerkel

Turning Insight Into Action

Community-Led Growth Was a Useful Start. Now What?

Community-led growth helped make community more visible. It gave teams better language and raised the expectation that community should connect to business outcomes.

But in a lot of companies, that's where the progress stops.

Community may be valuable. It may influence growth. But it still sits outside the workflows that actually drive onboarding, adoption, retention, feedback, and expansion.

Use this worksheet to identify where that's happening in your business.

Pick one workflow to examine

Choose one area where community should have more influence on the outcome:

Onboarding

Customer education

Product feedback

Support / peer help

Advocacy

Pipeline

Expansion

Events

Other: _____

What does this workflow look like today?

Who owns it? What are the main steps? What systems or touchpoints make it run?

Josh Zerkel

Turning Insight Into Action

Where and how does community show up today?

Is it actually part of the workflow, or just sitting nearby?

What did the community-led growth framing help make visible here?

What value can you now see, name, or measure more clearly because of that framing?

Where does that framing still fall short?

Where is community still useful, but not something the business actually relies on?

If community disappeared tomorrow, what would actually break?

What would stop happening? What would continue mostly as usual?

Josh Zerkel

Turning Insight Into Action

Where could community become part of the workflow?

If the workflow would continue mostly unchanged without community, that's the gap.

The next step is not to prove the value harder. It's to identify one place where community can become part of how the work actually happens.

Identify one integration point

Where could community become part of the workflow itself, rather than something adjacent to it?

Examples:

- A required onboarding step
- A peer layer inside customer education
- A formal feedback loop into product planning
- A structured support path that includes community answers
- An advocacy motion tied to expansion

What would need to change to make that real?

Consider ownership, process, systems, and team behavior.

What's the smallest useful experiment to try?

Complete these lines:

We want to integrate community into this workflow:

We believe this will improve:

Right now it's still outside the workflow because:

The first way to integrate it is:

We'll know it's working when:

Small Team. Big Mission. How Sandboxx Uses AI Agents to Support Military Families at Scale

Keynote

Speaker: Bethany Joy Clark

In this keynote, Bethany shared how Sandboxx's 2-person community team has welcomed 175,000+ individuals over the last year — most arriving in one of the most stressful moments of their lives, needing answers fast.

She walked through how they built Community Pro, a premium membership featuring eight purpose-built AI teammates designed to support military families across the entire military lifecycle.

Attendees left with honest lessons from a small team and a practical framework for knowing where AI belongs in their community — and where it doesn't.

Bethany Joy Clark

Head of Community at Sandboxx

Bethany Joy Clark is the Head of Community at Sandboxx, where she leads initiatives uniting America's military families and supporters through digital connection and storytelling. With deep roots in community building, she has led programs at TOMS, WeWork, Upwork, and The Walt Disney Company.

At Sandboxx, her work is deeply personal. With more than 20 family members who have served across four branches, she brings both professional expertise and lived experience to this role.

For Bethany, building communities where people feel seen, celebrated, and at home is not just what she does. It is who she is.



[Connect with Bethany on LinkedIn](#)

[Sandboxx Website](#)

[Connect with Annie on LinkedIn](#)

[Sandboxx Community](#)

[Connect with Janelle on LinkedIn](#)

[Social: @sandboxxapp](#)

Bethany Joy Clark

Turning Insight Into Action

3 Question Framework

Before you deploy AI in your community, ask these 3 questions:

1) Information or emotion?

AI delivers information. Humans hold the emotional labor. Know which the moment requires.

2) Will it reach everyone?

Design for your least tech-comfortable member first. Not your power users.

3) Where are the stakes?

Start where AI won't hurt anyone if it gets it wrong. Reports before relationships.

The interactive Community AI Planner helps community professionals figure out where to start with AI based on their specific community type, biggest time drain, most vulnerable member, and current comfort level. Answer four quick questions and get a personalized three-step action plan with tools and resources tailored to you.

This tool reflects what was shared on stage at CMX, and is a kind reminder that you don't need a big budget, an engineering degree, or a perfect plan. You just need to be willing to start. You don't need easy. You just need possible. We're cheering for you!

[Access the Community AI Planner Tool](#)



Bethany on stage at CMX Summit 2026

Your Community Metrics Are Lying (and AI is Why)

Keynote

Speaker: Anuj Adhiya

In this keynote, Anuj made a sharp case that most community teams are measuring success the wrong way — and that AI is making the problem worse.

He pointed out that traditional metrics like posts, comments, and time spent were designed for people talking to people, meaning a member who goes back and forth with a bot eight times looks "engaged" even if they never got help.

He shared a simple framework for measuring what actually matters — did members get what they came for, how many tries did it take, and what happened when AI failed — and walked attendees through how to run a quick 30-minute check of real conversations to spot the difference between genuine success and fake activity hiding frustrated users.

[Check Out the Session Slides](#)

Anuj Adhiya

Expert-in-Residence, Growth at Techstars

Anuj Adhiya is the author of 'Growth Hacking for Dummies' (Wiley & Sons). He has extensive experience working with early stage startups, serving as their first growth hire to streamline processes and teams.

Anuj is also Expert-in-Residence at Techstars and holds mentoring positions at Harvard Innovation Labs, First Round Fast Track, Seedstars, and The McCarthy(s) Venture Network.

Prior to his current roles, he held positions as the Category Growth Lead at The Predictive Index, where he successfully launched the talent optimization category, and as the Director of Engagement and Analytics at GrowthHackers, he grew it into the world's largest growth community.



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[Anuj's Substack](#)

[Growth Hacking For Dummies](#)

Anuj Adhiya

Turning Insight Into Action

The Truth Tracker Audit Worksheet

A 60-minute guide to measuring whether your AI actually works

Part 0: How to Pull 20 Interactions (10 minutes)

Where to find them:

- Your community platform's recent activity feed
- Support ticket system (filter by AI-tagged conversations)
- Community analytics export (last 30 days of AI interactions)
- Direct message logs where AI was involved

What counts as an "interaction":

- One complete thread/conversation where AI was involved from start to finish
- Include both resolved AND unresolved conversations
- Include abandoned threads (member stopped responding)

Pro tip: Pull the most recent 20 chronologically. Don't skip the messy ones.

Part 1: Pick Your AI Feature (2 minutes)

Which AI feature are you auditing today?

- AI answering questions** (support bot, Q&A assistant, help desk)
- AI matching/connecting people** (recommendations, introductions, networking)
- AI moderating content** (auto-moderation, spam detection, flagging)
- AI generating content** (social posts, summaries, newsletters, responses)
- The feature I'm auditing:** _____

Part 2: Define Success vs. Failure (3 minutes)

For the AI feature you picked, complete this:

Success looks like: _____

Failure looks like: _____

Anuj Adhiya

Turning Insight Into Action

Quick reference guide:

AI Feature Type	Success =	Failure =
Answering questions	Member got accurate answer and moved forward	Wrong answer, no answer, or member gave up
Moderating content	Correctly identified violations without over-moderating	Missed violations OR removed good content
Matching people	Member connected with relevant person/content	Irrelevant matches, member ignored them
Generating content	Content was useful, members engaged with it	Generic/irrelevant content, members ignored it



Anuj on stage at CMX Summit 2026

Anuj Adhiya

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Part 3: The 20-Interaction Audit (30-40 minutes)

Pull 20 recent interactions where your AI feature was involved. For each one, track:

#	Success? (✓/X/?)	# of Back-and-Forths	What happened at the end?
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			

Anuj Adhiya

Turning Insight Into Action

#	Success? (✓/X/?)	# of Back-and-Forths	What happened at the end?
16			
17			
18			
19			
20			

Part 4: Calculate Your Truth Metrics (5 minutes)

Metric 1: Intent Resolution Rate (IRR)

- Count your ✓ marks: ____
- Divide by 20: $\text{____} \div 20 = \text{____}\%$

Benchmarks: Above 75% = Healthy | 50-75% = Concerning | Below 50% = Urgent

- Compared to before AI: What was resolution before? ____%

Metric 2: Turns to Success (TTS)

- Add up back-and-forths for ✓ interactions only: ____ total turns
- Count your ✓ marks: ____ successes
- Divide: $\text{____} \div \text{____} = \text{____}$ average turns to success

Benchmarks: Under 3 = Healthy | 3-5 = Concerning | Above 5 = Urgent

- Compared to before AI: What was this before? ____

Metric 3: Recovery Rate (RR)

- Count your X marks: ____ failures
- How many of those escalated to humans? ____
- Divide: $\text{____} \div \text{____} = \text{____}\%$

Benchmarks: Above 60% = Healthy | 40-60% = Concerning | Below 40% = Urgent

- How many just disappeared? ____ (failures minus escalations)
- That's ____% silent abandonment

Continue the Truth Tracker Audit Worksheet

The Dawn of the AI Builder

Workshop & Live Engagement

Speaker(s): Marily Nika & Derek Andersen

In this workshop, Marily joined remotely to walk community professionals beyond theory and into practice, showing how accessible AI tools — including Stitch, Opal, and Pomelli — can be used to generate on-brand multimedia content, automate workflows, and build end-to-end AI agents that amplify a community's voice.

Derek Andersen then led a live, interactive session with the room exploring practical strategies for transforming content creation, engagement, and community impact across teams of all sizes.

Attendees left equipped not just to work faster, but to design AI-driven experiences that actually move the needle.

Marily Nika

Gen AI Product at Google

Based in Silicon Valley, Dr. Marily Nika is an award-winning AI leader, builder, and educator with 12+ years of experience at Google and Meta, and a PhD in Computer Science.

She is the creator of top-rated AI programs, including her popular Maven course and the #1 AI Product Bootcamp. Marily is passionate about helping individuals and organizations harness AI to build impactful products and communities, and shares insights with a global audience through her writing at marily.substack.com.



Connect with Marily on LinkedIn

Marily Nika & Derek Andersen

Turning Insight Into Action

Workshop & Live Engagement Takeaways: The Dawn of the AI Builder

Marily's session was less of a presentation and more of a live toolkit drop — a practical look at the AI tools she's actually using, and how community builders can start using them too.

Derek's live engagement portion pushed the conversation further, helping the room think about what it means to build with AI, rather than just use it.

Here's a breakdown by tool:

From Marily: Google Labs Tools (labs.google.com)

Google Labs is Google's home for AI experiments, and it's worth bookmarking. Three tools Marily highlighted are particularly relevant for community builders:

- **Pomelli**: a campaign and photoshoot creator. Think AI-generated visual content for community events, member spotlights, or social campaigns without needing a design team.
- **Stitch**: an AI design tool that takes you from idea to UI. Great for mocking up community pages, onboarding flows, or program landing pages quickly.
- **Opal**: a no-code AI app builder. Build lightweight tools and automations for your community without writing a single line of code.



Marily presenting remotely at CMX Summit 2026

Marily Nika & Derek Andersen

Turning Insight Into Action

From the Room: What Attendees Are Using

Derek's live engagement portion turned the session into a real-time knowledge share.

Here's what came up from attendees:

- **Claude + MCP:** Connect Claude directly to your community platform via API using MCP, a connector that lets Claude pull in member data, activity, and engagement signals. If your platform has developer docs, the tip was simple: give the docs to Claude and ask it to build the custom MCP for you.
- **GumLoop:** An AI automation framework for pulling in multiple data sources and building workflows between them. Useful for stitching together data from different tools without manual work.
- **Monday.com + Claude:** Using Claude to read a Monday.com board and surface insights. The framing: “the anti-to-do list”. Instead of adding to your plate, ask Claude what you currently spend time on that could be automated or delegated.
- **The "AI Interns" Framework:** Treating AI agents like interns that start out rough and get smarter over time. The mindset: AI is the only tool that teaches you how to use it.
- **Couch to 5K for AI:** A training resource for community managers who want to get up to speed on building with AI, including writing code.



Derek's live engagement with attendees at CMX Summit 2026

Build Your Standout Skillset: Patterns to Steal from the Best Community Leaders

Keynote

Speaker: Jon Wishart

Jon brought a perspective few people in the industry can offer — not one career story, but thousands of data points drawn from working daily with community leaders across companies of every size and growth stage.

In a rapid-fire keynote, he distilled what actually separates the community professionals who are rising from everyone else: the trends worth paying attention to right now, the habits and beliefs worth leaving behind, and the honest, direct lessons from the best in the business that you won't hear anywhere else.

[Check Out the Session Slides](#)

Jon Wishart

VP of Community Strategy & Growth at Gainsight

Jon has been working with enterprise communities for over two decades helping hundreds of brands launch and grow their programs. At Gainsight, Jon aids customers and prospects build full-scope community strategies and roadmaps while consistently showing measurable ROI.

[Connect with Jon on LinkedIn](#)



Jon Wishart

Turning Insight Into Action

A Community Operator's Playbook for the AI + "No-Click" Era

PAI answers questions before anyone clicks through, superusers are burning out on repeat tickets, and vanity metrics mean nothing.

This playbook lays out what actually works now: organizing around user intent (not folder hierarchies), redeploying superusers as creators (not answer factories), and writing atomic content.

AI can find and attribute, and shipping every product release with a full "bill of materials."

The north star: reduce effort, raise quality, unify the experience, protect human energy, prove business value.

[Access the Community Operator's Playbook](#)



Jon on stage at CMX Summit 2026

AI-Ready Communities: Turning Your Community Into a Knowledge Goldmine

Workshop

Speaker: Richard Millington

Richard led a future-focused workshop helping community leaders prepare their communities for an AI-driven world by improving the quality, reliability, and structure of their knowledge.

Rather than chasing engagement metrics or AI features, the session zeroed in on what truly matters right now: community hygiene.

Participants walked away understanding how AI changes the role of community from conversation space to knowledge system, why poor hygiene quietly undermines trust and value, and how to make targeted improvements that allow communities to safely support AI, scale expertise, and deliver long-term enterprise impact.

[Check Out the Session Slides](#)

Richard Millington

Founder of FeverBee

Richard Millington is the founder of FeverBee, a community consultancy, and author of 'Build Your Community' (Pearson, 2021).

Over the past 15 years, Richard has helped 320+ organisations, including Apple, Meta, Microsoft, Google, The World Bank, and SAP use powerful psychology to build thriving communities.

Through his community management academy, he has also trained 1450 of the world's top community pros.



[Connect with Richard on LinkedIn](#)

[FeverBee Website](#)

Richard Millington

Turning Insight Into Action

Prepare Your Community for AI.

The five dimensions, the problems to fix, and what to do

THE CORE IDEA

AI does not fix bad data. It **amplifies** it.

Every duplicate, contradiction, and outdated answer in your community is now being served to customers at scale, with confidence, and without caveat. No one else is going to clean this up for you.

1 THE FIVE DIMENSIONS OF AI READINESS

Data Quality

Can AI extract a correct, unambiguous answer?

Authority

Can AI tell expert answers from opinions?

Taxonomy

Can AI find the right content via structure?

Terminology

Does your community use consistent language?

Freshness

Can AI tell if content is still current?

Richard Millington

Turning Insight Into Action

2 THE SEVEN PROBLEMS TO FIX

Duplication

One question.
Many fragments.

Why AI Fails

The same question exists in multiple threads with partial answers. AI retrieves all fragments and produces a hedged, confused response.

What to Do

Pick the canonical thread. Merge or close duplicates with redirects. Consolidate views and notes into one.

Contradiction

Same question.
Opposite answers.

Why AI Fails

Two threads give directly opposing advice. Both marked solved. AI cannot determine which is correct and hedges.

What to Do

Detect systematically with AI prompts. Escalate to a subject matter expert. Archive the wrong answer with explanation.

Decay

Was correct.
No longer is.

Why AI Fails

Answer was accurate when written. Product UI, pricing, or features changed. Nobody updated the thread. AI treats it as current.

What to Do

Add “last verified” dates. Tie content reviews to product release cycles. Use version tags so AI knows scope.

Richard Millington

Turning Insight Into Action

2 THE SEVEN PROBLEMS TO FIX

No Authority Signal

Expert replies look like any other.

Why AI Fails

A staff engineer's answer looks identical to a new member's guess. AI has no signal to distinguish trustworthy content.

What to Do

Use accepted answers, staff badges, upvotes, and structured metadata (schema.org, customer ranking fields, API attributes).

Bad Taxonomy

No structure.
No scope.

Why AI Fails

Threads sit in wrong categories, have no tags, no resolution status, no version. AI retrieves them for the wrong features.

What to Do

Controlled categories, tags (dropdowns not free text), mandatory resolution status, content type, and scoping custom fields.

Bad Terminology

Six names for one feature.

Why AI Fails

"Workflows", "Automations", "the workflow thing." AI treats each variant as a separate concept. Six names = six retrieval silos.

What to Do

Update titles with canonical terms + add edit notes. Work through terminology clusters. Add editorial notes to accepted answers using old names.

Richard Millington

Turning Insight Into Action

2 THE SEVEN PROBLEMS TO FIX

No Freshness Signal

Can't tell what's current.



Why AI Fails

No signal showing what's still accurate. A verified-last-month thread looks the same as a 2021 thread. AI trusts both equally.



What to Do

Add the five signals: Last Verified Date, Content Owner, Lifecycle Status, Review Cadence, Version Tag.

Continue the Prepare Your Community for AI Worksheet



Richard on stage at CMX Summit 2026

Stop Designing Your Events for Instagrammable Moments: Why Community Engagement Should be Measured by Return, Not Registrations

Hot Take

Speaker: Jessie Jacob

Jessie made the case that registrations are one of the weakest metrics in community building — and that return is the signal that reveals true engagement.

Drawing from her experience designing and scaling global community programs, she challenged the industry's default of measuring success through attendance and social media impressions, which can make events look successful on paper while masking a deeper problem: people don't come back.

By shifting focus to return rates, leader engagement, and consistent gatherings, she showed what it actually looks like to measure the real health of a community. Because the goal was never getting people to show up once — it's giving them a reason to keep coming back.

Jessie Jacob

Sr. Community Engagement Manager at Culture Amp

Jessie Jacob is an experience designer, facilitator, and community builder who helps brands create gatherings people actually want to come back to.

She currently leads the global Culture First community, including a chapters program of 100+ volunteer-led groups with over 25,000 members — and specializes in designing in-person and virtual experiences that foster genuine connection and lasting belonging.



[Connect with Jessie on LinkedIn](#)

[Culture First Community](#)

Jessie Jacob

Turning Insight Into Action

Community Health Audit: Rhythm + Return

Use this quick audit to assess whether your community is optimized for reach—or actually built for engagement.

Rhythm + Return → Reach

1. Rhythm (Consistency)

- How often are you hosting gatherings?
- What % of our chapters, user groups or hosts are consistently active?
- Do members trust that your community will show up regularly?

2. Return (Engagement)

- What % of attendees come back to a second or third event?
- Are you tracking return at all? If not, how might you?
- What other signals tell you someone wants to stay involved?

3. Reflection

- Are you optimizing for attendance or repeat participation?
- What would change if return became our primary success metric?

4. Action

- Identify one way to increase consistency (rhythm)
- Identify one way to improve the experience so people come back (return)



Jessie on stage at CMX Summit 2026

Your Community Isn't an Engagement Tool—It's a Trust Engine

Hot Take

Speaker: Vero Heino

Vero challenged leaders to rethink community's role: not as an engagement channel, but as a deliberate system for shaping trust and influence.

She made the case that most community programs optimize for activity — but activity doesn't shape perception. People do.

She also shared practical ways to activate the right contributors, reduce noise, and connect community efforts directly to reputation and measurable business impact — because the most influential members are already driving how a brand is discussed across platforms and peer networks. The question is whether you're intentionally guiding and elevating that influence.

[Check Out the Session Slides](#)

Vero Heino

Founder and Principal at Group COCO

Veronica (“Vero”) Heino is the Founder and Principal of COCO, a strategic communications and public affairs advisory firm that helps organizations and leadership teams turn complex priorities into clear communication, aligned stakeholders, and measurable outcomes.

With more than 20 years of global experience, she works at the intersection of communications, community, and executive leadership. Before founding COCO, Vero held senior leadership roles at Visa, Etsy, and FleishmanHillard. At Visa, she led global stakeholder engagement for the company’s social impact initiatives. At Etsy, she led global seller community engagement and education programs serving more than five million entrepreneurs worldwide. Her work focuses on turning community into a strategic asset—driving insight, trust, and influence.



[Connect with Vero on LinkedIn](#)

[Group COCO Website](#)

[Group COCO LinkedIn](#)

Vero Heino

Turning Insight Into Action

The COCO TRUST Framework

The COCO TRUST Framework™ helps community teams shift from measuring engagement to building community as a system of influence.

Use it as a working session or team exercise to identify who shapes perception in your community, design meaningful participation structures, and connect community input to real decisions. Teams walk away with a mapped influence network, redefined trust metrics, and at least one concrete structural change to implement immediately.

The result: stronger credibility with leadership and a community that generates outcomes, not just activity.

Need help running it? groupcoco.com.



Vero on stage at CMX Summit 2026

Vero Heino

Turning Insight Into Action

T

Trace Influence

Find who shapes perception—not just who posts most.

ASK:

- Who generates responses (not just reactions)?
- Who do others trust in moments of uncertainty?

ACTION

Map your top 10 influence nodes across channels (internal + external).

R

Recognize vs. Reward

Move from activity perks to influence-based access.

ASK:

- Are we rewarding activity or influence?
- Do top contributors have visibility into decisions?

ACTION

Shift from perks → participation: early access, context, feedback loops.

U

Unlock Access

Trust grows with proximity to decisions.

ASK:

- Where can contributors see trade-offs, not just outcomes?
- How do we bring them closer to product, policy, or roadmap?

ACTION

Create structured access points: advisory groups, beta councils, chapters.

S

Structure Participation

Unstructured communities create noise. Structured ones create signal.

ASK:

- Where are conversations actually shaping outcomes?
- Do we have spaces for peer-to-peer leadership?

ACTION

Design intentional spaces: chapters, working groups, thematic hubs.

Vero Heino

Turning Insight Into Action

T

Track Signals That Matter

Engagement is activity. Trust is influence.

ASK:

- Are we measuring volume or impact?
- Can we trace how community input shapes decisions?

ACTION

Track: contribution → adoption, peer influence → behavior change, sentiment → advocacy.

KEY TAKEAWAYS

- Community is not a channel. It is a system of influence.
- Engagement scales activity. Trust scales decision impact.
- Your moat isn't how much people talk—it's who people listen to, and how you design for it.

Apply the COCO TRUST Framework

Step 01: Influence Mapping

List your top 5–10 community members who drive conversations, are referenced by others, or influence beyond your platform.

→ *What makes them trusted?*

Vero Heino

Turning Insight Into Action

Step 02: Access Audit

For those individuals: What decisions do they have visibility into today? Where are they currently excluded?

→ *What's one level of access you can unlock?*

Step 03: Participation Design

Where can they contribute meaningfully—not just engage? What structure would elevate their role?

→ *Define 1 new format (e.g., advisory circle, chapter, pilot group).*

Step 04: Signal Redesign

Current metric → Better metric. Example: Posts → Contributions adopted · Likes → Peer responses generated · Reach → influence on decisions

→ *Redefine 3 metrics you report to leadership.*

MY COMMUNITY TRUST COMMITMENT

One thing I will change in how my community measures trust:

Rejection is Redirection: Build the Role You Want

Keynote

Speaker: Guilda Hilaire

Guilda shared one of the most honest and galvanizing stories of the Summit — facing five rejections for the job she wanted, and when she finally got through the door, finding the position had already changed.

Rather than give up, she took matters into her own hands, building a global community program from scratch, earning trust across eight managers, and designing initiatives that drove measurable impact.

Through real-world examples — from advocacy programs to customer "Rewind" initiatives — she walked attendees through how to identify gaps in their organization, turn repeated setbacks into a blueprint, and align their skills and customer understanding to build programs that prove value. The room left with a clearer sense of how to navigate career pivots, design their own path, and make the strategic case for community at their company.

Guilda Hilaire

Senior Director of Marketing Evangelism at Salesforce

Guilda Hilaire is Senior Director of Marketing Evangelism at Salesforce, where she leads the global marketing customer community and a 400+ member advocacy program.

She specializes in building high-impact programs that amplify customer voices, drive engagement, and deliver measurable business value. Known for creating her role from the ground up, Guilda has spent the past seven years aligning customer success with strategic growth initiatives at scale.

She is passionate about fostering community, elevating customer stories, and empowering professionals to grow their careers through connection, advocacy, and shared success.



[Connect with Guilda on LinkedIn](#)

Gilda Hilaire

Turning Insight Into Action

Many community leaders are figuring it out as they go, without clear guidance, roadmap or internal support.

Whether you're making the business case to leadership, figuring out where to start or second guessing yourself, these words are for you.

The gap you see and the gut feeling you have are real.

The idea you're holding onto is worth pursuing, and every setback you've faced is part of your success story.

Use this if you need a push. We all do.

The floor you land on becomes the foundation you build on.

Keep evolving what you built. Don't let it become stale.

Don't let your brilliance collect dust.

Be your own megaphone. Stay visible.

Always be sharing! Every metric counts.

The community needs more leaders who are willing to speak up. Be that voice.

Rejection isn't the end of your story. It's just the part that makes the rest of it worth telling.



Gilda on stage at CMX Summit 2026

Renaissance Minds: The Hidden Power of Community Managers

Bonus Content

Speaker: Avital Knoller

A week before Summit, Avital found out she wouldn't be able to join us in person — but she still wanted to make sure her ideas reached the room, so we're sharing her session details and presentation here as bonus content.

Avital challenges one of the most persistent misconceptions in our industry: that community managers are just engagement drivers or moderators. Drawing from her experience building communities at a large startup, a company Google acquired for \$32 billion, and her current role at Orchid Security, she makes the case that the best community managers operate like Renaissance minds — connecting marketing, product, sales, and customer success to turn community into a strategic asset.

Her core argument: fluency in multiple "business languages," building internal alliances, and aligning community work with cross-functional pain points can drive measurable ROI, influence product decisions, and elevate community from a support function to a strategic partner.

Check Out the Session Slides

Avital Knoller

Head of Ecosystem at Orchid Security

Avital is a community leader focused on building strategic, high-impact communities that drive business outcomes. With experience across high-growth startups, including a company acquired by Google for \$32 billion, Avital has built communities from the ground up and scaled them by aligning closely with product, marketing, sales, and customer success teams.

Currently leading community at Orchid Security, Avital focuses on turning community into a cross-functional asset that influences product direction and delivers measurable ROI. Her work centers on bridging silos, translating business needs, and positioning community as a key driver of company growth.



Connect with Avital on LinkedIn

Avital Knoller

Turning Insight Into Action

The "**Renaissance Minds**" framework, known as the **L.I.N.G.O. model**, provides a structure for community managers to transition from operating as channel managers to becoming strategic system connectors.

The core thesis is that community impact is generated by translating insights between business functions and connecting organizational systems.

The L.I.N.G.O. Model

- **L** – Learn the Languages: Move beyond "community language" to understand how other functions define value, such as Marketing (growth, narrative), Sales (revenue, pipeline), Product (usability, roadmap), and CS/Support (retention, efficiency).
- **I** – Identify the Signals: Transform "noise" from fragmented conversations—such as feature requests, onboarding friction, or emerging use cases—into actionable cross-functional insights.
- **N** – Navigate Systems: Map the business to understand decision-making, feedback loops, and internal bottlenecks before attempting to influence the system.
- **G** – Generate Alignment: Make the community useful to other teams by connecting insights directly to business priorities, such as turning feedback into product input or stories into marketing assets.
- **O** – Orchestrate Impact: Position community as essential infrastructure by building internal alliances, aligning with KPIs, and proactively packaging insights to influence organizational decisions.

Implementation and Strategy

- **Workflow:** Successful strategies involve a cyclical workflow of observing daily inputs, translating them into business impact weekly, building repeatable systems monthly, and re-evaluating strategic positioning quarterly.
- **Cross-Functional Playbook:** Community managers should act as a "Renaissance Layer," translating signals for Product (feedback/beta), Sales (proof/objection handling), Support (deflection/retention), and Marketing (narrative/content).
- **Strategic Check:** Community is truly strategic when it moves away from vanity engagement metrics toward influencing business decisions, improving efficiency, and driving ROI.

[Access the L.I.N.G.O Framework](#)

From the Floor: Unconference Takeaways

Bonus Content

The stage has a program. The Unconference has a pulse.

Every year, some of the most honest and energizing conversations at CMX Summit don't happen in scheduled sessions, they happen when we hand the mic to the room. For the very first time, we held an Unconference session, bringing attendees together to set their own agenda, surface what's really on their minds, and dig into the topics that don't always make it onto a formal program.

What follows are the key themes and takeaways that emerged from those conversations: unscripted, practitioner-driven, and entirely yours.

Using AI to Create Authentic Community Engagement

The biggest barrier to AI adoption in community isn't the technology — it's trust.

Attendees shared that members often struggle to believe AI interactions are authentic, with fear of misinformation and bots driving skepticism, particularly in older or more tight-knit communities. The core challenge the room kept coming back to: AI ≠ authenticity by default — but it can get closer with the right approach.

What's working: treating AI like an intern — give it a task, review the output, and refine it. Social listening and sentiment analysis emerged as a powerful pairing, helping AI learn to read communities more accurately while freeing humans to focus on the relationships that actually matter.

The group also highlighted using AI to automate the tasks you don't love — drafting, scheduling, routing — so you can spend more time on the work that requires a human touch.

The shared takeaway: start small, stay curious, and be intentional about where AI genuinely belongs in your workflow — and where it doesn't.

From the Floor: Unconference Takeaways

Bonus Content

Getting Members, Employees & Speakers to Contribute

The room identified a core tension: most community members are lurkers, and the rise of AI is making it worse — people are resolving their questions with AI before ever posting, accelerating what one attendee called "dead internet theory."

What's working: leaning harder into what AI can't replicate: human connection, gated and exclusive content, and co-created resources that give members a reason to show up. Virtual sessions and in-person user groups consistently outperformed async forums because people want to connect with real humans and influence the product roadmap directly.

For employees and speakers, the key is embedding community participation into their existing workflows — getting it into playbooks, hosting Product Power Hours, and transitioning lurkers into learners by trusting your super users to lead the way.

The simplest advice from the room: talk to your users. Everything else follows from that.



Unconference discussion groups at CMX Summit 2026

From the Floor: Unconference Takeaways

Bonus Content

Proving Community's Value Internally

The challenge isn't just measurement — it's access, alignment, and executive buy-in. Groups flagged being stuck in old metrics (classic community stats vs. core business outcomes), fragmented data systems, and community being used as a "barometer" rather than a strategic input.

What's working: using AI to build ROI calculators that start with existing data points and layer in engagement and community data to generate richer insights. Competitions and innovation challenges emerged as a strong proof point — creating focus, buzz, and new ways customers could leverage the product. AI bots summarizing and analyzing community content in real time (sentiment, ideas, concerns) are helping teams surface insights that previously required hours of manual work.

The framing that resonated most: stop trying to prove value with a single number. Build a "basket of metrics" that collectively tell a persuasive story — and embed community as part of the infrastructure across marketing, sales, CS, and operations, not a standalone function defending its existence every quarter.



Unconference discussion groups at CMX Summit 2026

CCIA Ceremony Takeaways

Bonus Content

If the Grammys celebrate the best in music, the CMX Community Industry Awards (CCIAs) celebrate the best in community — the professionals and programs pushing the field forward in ways the rest of us can learn from.

This year's winners didn't just build communities. They built revenue engines, global movements, and proof points that will make every community leader's internal business case a little easier to make.

Here's what stood out across the 2026 winners:

The numbers that stop you in your tracks

- **Cheryl Rasmussen** and Palo Alto Networks achieved an 86% case deflection rate and \$68K/month in direct cost savings — while also growing attendance 118% after a platform migration.
- **Edwin Gonzalez** built a 5,000+ member community solo in 6 months at TaxDome, where engaged firms were 3x more likely to expand licenses within 90 days of joining.
- **Michael Kimathi's** developer community programs at Africa's Talking influenced \$9M+ ARR — including a Kigali founder who launched an emergency SMS service within a week of activation.
- The **Pokémon GO Ambassador Program** scaled from 300 to 2,000 ambassadors, generating 183,000 events and 6 million attendances.
- **Steve Chen's** Code & Coffee grew from 374 to 822 in-person events in a single year, across 37 cities, 100% volunteer-run.

CCIA Ceremony Takeaways

Bonus Content

The mindset shifts worth stealing

- **Woolworth's Bunch** community redefined engagement entirely — their Community Health Index and 99.5% member retention intent show what it looks like to measure belonging instead of clicks.
- **Comunidade CEO Digital** shifted from vanity metrics to member outcomes, and their NPS jumped from 44 to 68.9 — while generating 674 social proof assets used directly in ad campaigns in 2025 alone.

The through-line across every winner

Community isn't a nice-to-have. It's infrastructure.

Whether it was a solo community manager outperforming entire teams, a volunteer-run org hosting a 700-person global hackathon, or a developer program generating millions in pipeline — every winner this year proved that the right systems, the right trust, and the right human touch creates outcomes that no other function can replicate.



Our in-person winners on stage at CMX Summit 2026 (plus Cat & Margaux)!

Thank you!

Thank you for being part of CMX Summit 2026—whether you joined us in-person, or are just diving in through this Action Guide. We're so grateful you're part of the CMX community!

Your energy, insights, and passion are what make this industry so special. Thank you for showing up, for sharing your experiences, and for continuing to build community in meaningful, impactful ways.

We hope this guide helps you carry the momentum forward and turn inspiration into action.

CMX Summit 2026 may be over, but the magic never ends at CMX!

[Get Your Ticket to CMX Summit 2027](#)



Join the CMX Community!

The CMX Slack Community facilitates the sharing of information, resources, and encouragement among over eight thousand community professionals.

If you share a passion for community and would like to get to know a great group of friendly peers, share your knowledge, and learn something new. Join us!

[Join the CMX Community!](#)

Thanks to Our Sponsors:



Designed by:

Cat Nilsson

Community & Growth Lead at Bevy/CMX

Cat Nilsson is the Community & Growth Lead at Bevy and CMX, where she oversees all things CMX — including the Fellows program, Masterclasses, the Community Industry Report, and CMX Summit.

She joined through Bevy's acquisition of Intros AI in 2025, making the leap from customer success and sales into community leadership in under two years. Cat believes the best communities strike a balance between genuine belonging and measurable business impact — and that you shouldn't have to choose between the two.



[Join the CMX Community!](#)

[Connect with Cat on LinkedIn](#)

John Martin Tan

Webflow Front-End Developer and Design Expert at Bevy/CMX

John is a Webflow designer/developer and visual designer, supporting Bevy and CMX in creating dynamic, community-driven digital experiences.

With expertise in both development and design, he builds scalable, responsive websites and branded assets that capture the vibrant spirit of community-led growth.

[Connect with John on LinkedIn](#)



Thank you!



Thank you for showing up, for sharing your experiences, and for continuing to build community in meaningful, impactful ways.