Photo by Ian Cylkowski on Unsplash



IMPLEMENTING AN INCENTIVISED PARTNERS PROGRAM IN MAUTIC

@RCheesley

MAUTIC PROJECT LEAD

RUTH CHEESLEY (she/her)

18+ years using and contributing to open source projects

Located in Ipswich, UK

Working full time for Acquia as Mautic Project Lead

noti.st/rcheesley for slides, resources & notes

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ESTABLISHING AN INCENTIVISED PARTNERS PROGRAM

WHAT WE'RE GOING TO COVER



CONTRIBUTIONS

How do we determine what a contribution is, and track them over time?

Image by Pexels from Pixabay



FINANCES

How do we make the financial aspect equitable around the world to all potential partners?

Photo by Ibrahim Boran on Unsplash



PROGRAM

What does the partners program offer? How has it worked? What have we learned?

Photo by AbsolutVision on Unsplash

ABOUT MAUTIC

A LITTLE BIT OF HISTORY

- Open source marketing automation platform launched in 2015 (mautic.org / github.com/mautic/mautic)
- Founder's SaaS company Mautic Inc was acquired by Acquia in 2019
- Community now has its own governance model and is operating as a self-sufficient open source project



WHY DID WE NEED A PARTNERS PROGRAM?

WE WANTED TO:

- Encourage **practical contribution** and **financial support** from businesses who depend on Mautic
- Help people **find the 'makers'** who are actively supporting the community
- **Promote organisations who are contributing** both financially and in practical terms
- Give organisations **something they can be proud of** and which helps demonstrate their commitment to the project and community



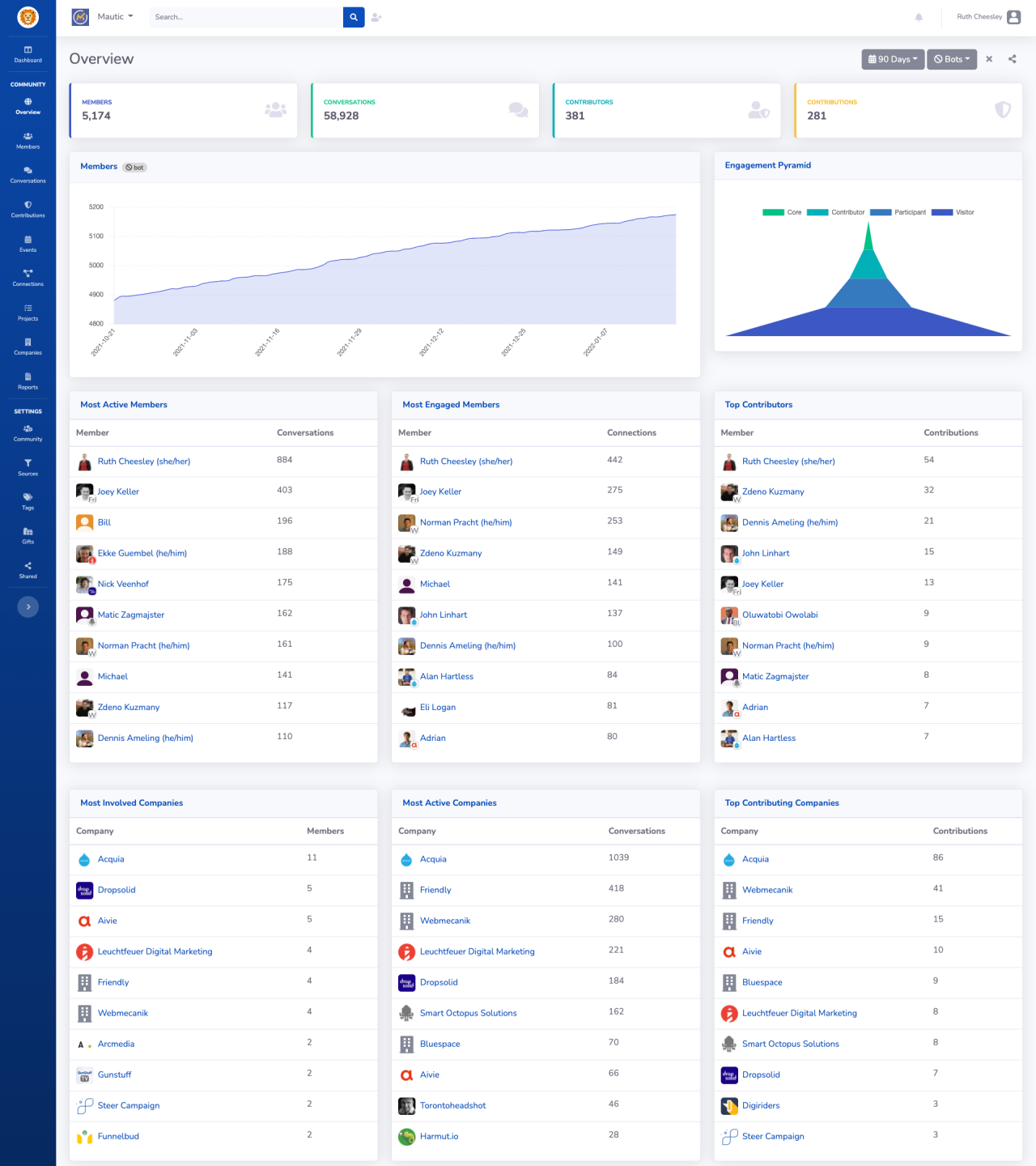
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GETTING THE BASICS IN PLACE

CONTRIBUTIONS

- What is defined as a contribution?
- Where do contributions happen?
- How do we track out-of-channel contributions?
- How do we associate contributions with organisations?



OPEN SOURCE COMMUNITY CRM

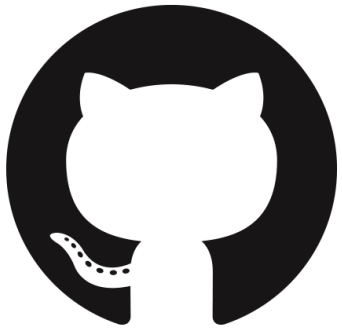
SAVANNAH CRM

- Bring together all our community channels in one central dashboard
- Determine what is a contribution, and track this over time
- Identify organisations who are contributing

https://github.com/SavannahHQ/Savannah

MONITORING CONTRIBUTIONS

WHAT DO WE TRACK?



01

GITHUB

Pull Request opened



02

DISCOURSE

Replies marked as solutions

03

SLACK

Help given in a chat



04

MEETUP

Hosted a meetup



MONITORING CONTRIBUTIONS

WHAT DO WE TRACK?



05

REDDIT

Help given in a thread



06

STACK EXCHANGE

Accepted answer to question

07

PODCASTS

Community podcasts



08

BLOGS

Articles on mautic.org



OTHER CONTRIBUTIONS

GIVING CREDIT WHERE IT IS DUE

MANUAL OR API ASSIGNMENT

Team Leads can manually assign credits to a contributor for anything outside of existing tracked channels (e.g. leading a sprint, speaking at a conference, proof-reading an article).

The API can be used to track other activities - for example Jira issues being closed, GitHub release being made.



Photo by Caleb Chen on Unsplash



INDIVIDUAL CONTRIBUTIONS

WHAT DO WE REPORT ON?

- Top contributors
- Most active members

Photo by Shane Rounce on Unsplash



ORGANISATION CONTRIBUTIONS

WHAT DO WE REPORT ON?

- Top contributing organisations
- Most active organisations

Photo by airfocus on Unsplash

RECOGNISING ORGANISATIONS

MONTHLY SHOUT-OUT

A big thank you to all the organisations who have contributed to Mautic in December! These organisations are making Mautic and helping to grow our awesome community. The numbers are quite a bit lower as many will have been out on leave over the festive period, just in case you're wondering about all the ⬇️!

You can always take a look at the data for the last 90 days via this link: https://savannahcrm.com/public/overview/2b4590bf-cad0-4c71-870a-6f942a25f8fe/

⬆️ = Increase from last month
⬇️ = Decrease from last month

Most active companies:

Acquia 216 (⬇️ 55.92%)
Friendly 110 (⬇️ 32.52%)
Leuchtfeuer Digital Marketing 76 (⬆️ 55.10%)
Smart Octopus Solutions 63 (⬇️ 21.25%)
Webmecanik 46 (⬇️ 74.16%)
Dropsolid 44 (⬇️ 65.63%)
Torontoheadshot 26
Entrepositive 17
Aivie 16
AppCívico 16

Top contributing companies:

Acquia 14 (⬇️ 62.16%)
Aivie 5
Webmecanik 4 (⬇️ 82.61%)
Friendly 4 (⬇️ 20%)
AppCívico 2
Dropsolid 2 (⬇️ 60%)
Leuchtfeuer Digital Marketing 2 (⬇️ 66.67%)
it2servu.be 1
Bluespace 1 (⬇️ 83.3%)

Contributions are as defined here.

Want to appear on this list? Get contributing, and drop me a line with your company name, domain and the folk who work for you and we'll make sure that you are attributed correctly! (edited)

RECOGNISING CONTRIBUTORS

MONTHLY SHOUT-OUT

A big thank you also to all the individuals who are helping us build this awesome community 🫂🎉🙌🏻

Most active members:

@Joey Keller 104
@Michael 70
@Ekke Guembel 66
@mzagmajster 63
@Nick Veenhof 43
@Renato Cron 33
@kuzmany 27
aglyons 26
@john 24
nickbm 24

Top contributors:

@john 4
@kuzmany 4
@Adrian Schimpf 3
@Michael 2
Rahul Dhande 2
Volha Pivavarchyk 2
@ts-navghane 2
@Renato Cron 2
@Kathrin 2
@Joey Keller 2

This month we had 12 new contributors (⬆️ 20%) and 92 new members joining the community (⬇️ 21.37%).



GETTING THE BASICS IN PLACE

FINANCES

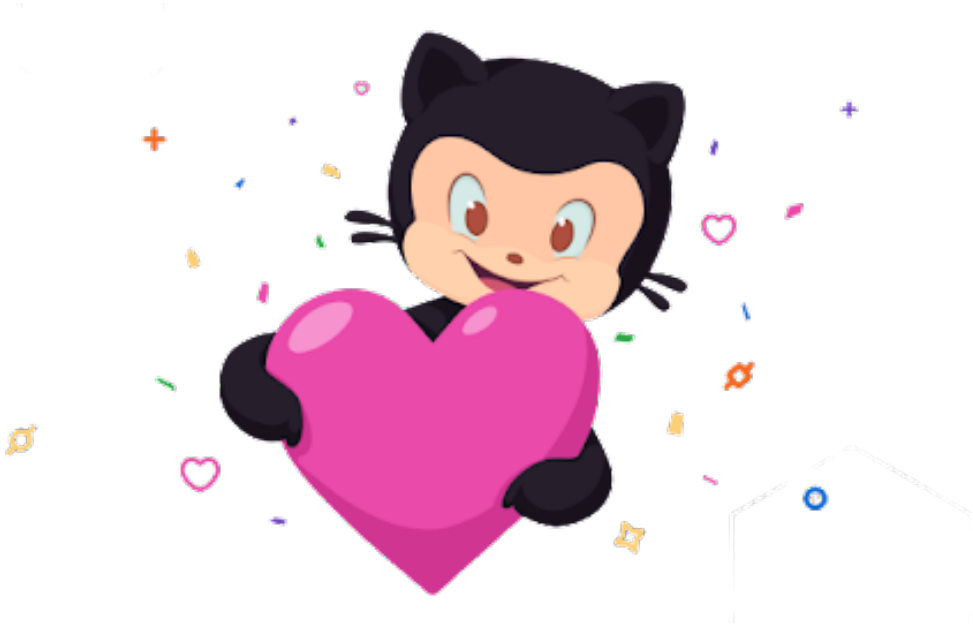
- How do we accept financial contributions?
- How much is ‘enough’ and over how long?
- How do we make that amount equitable worldwide?

ACCEPTING DONATIONS

FINANCIAL TRANSPARENCY IS KEY

- Established Open Collective, hosted by Open Source Collective, to hold and manage our funds
- Applied for GitHub Sponsors which passes funds directly to Open Collective

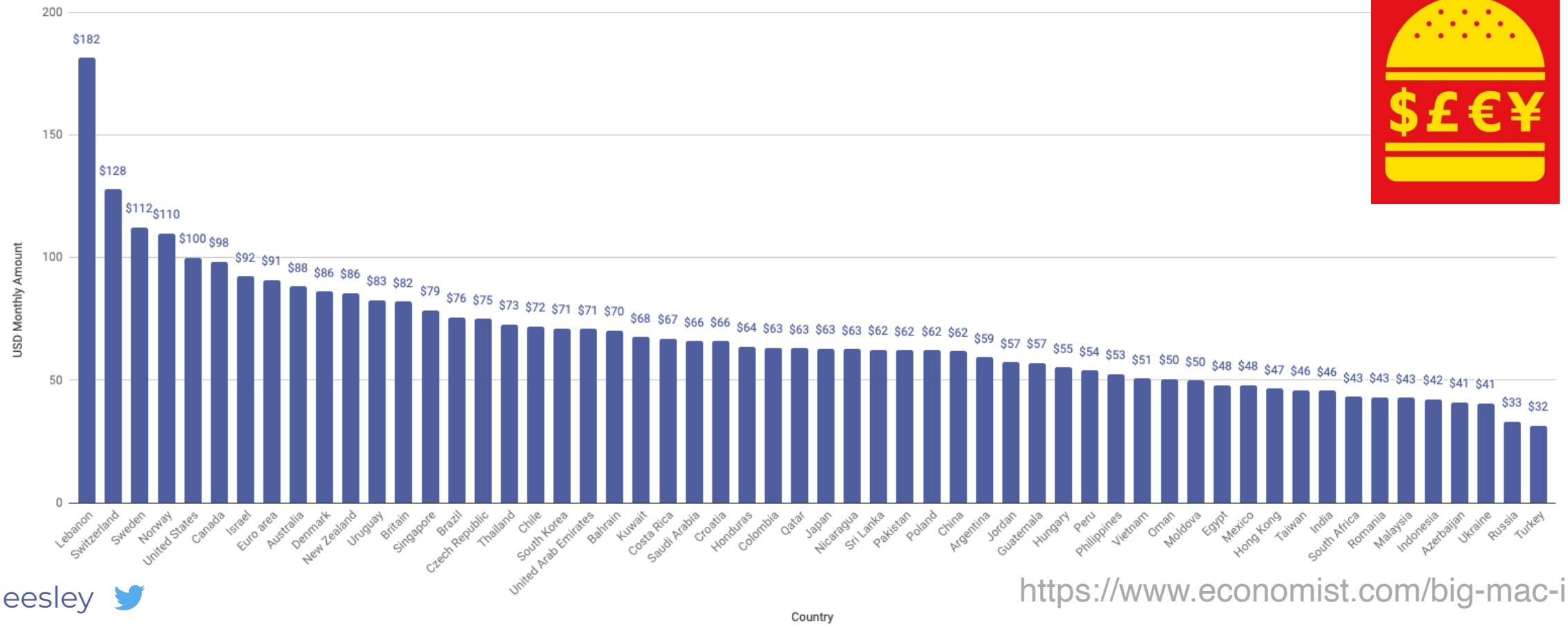
open collective



HOW MUCH IS ENOUGH?

HOW TO MAKE THRESHOLDS EQUITABLE

- Implemented the ‘Big Mac Index’ to determine how much would be the minimum contribution by country
- 3 months minimum term for consistent contributions (financial and practical contributions)





https://www.economist.com/big-mac-index



BUILDING A PARTNERS PROGRAM

HOW DOES IT WORK?

- How do organisations apply to join?
- What do they get as a Community Partner?
- How are they incentivised?

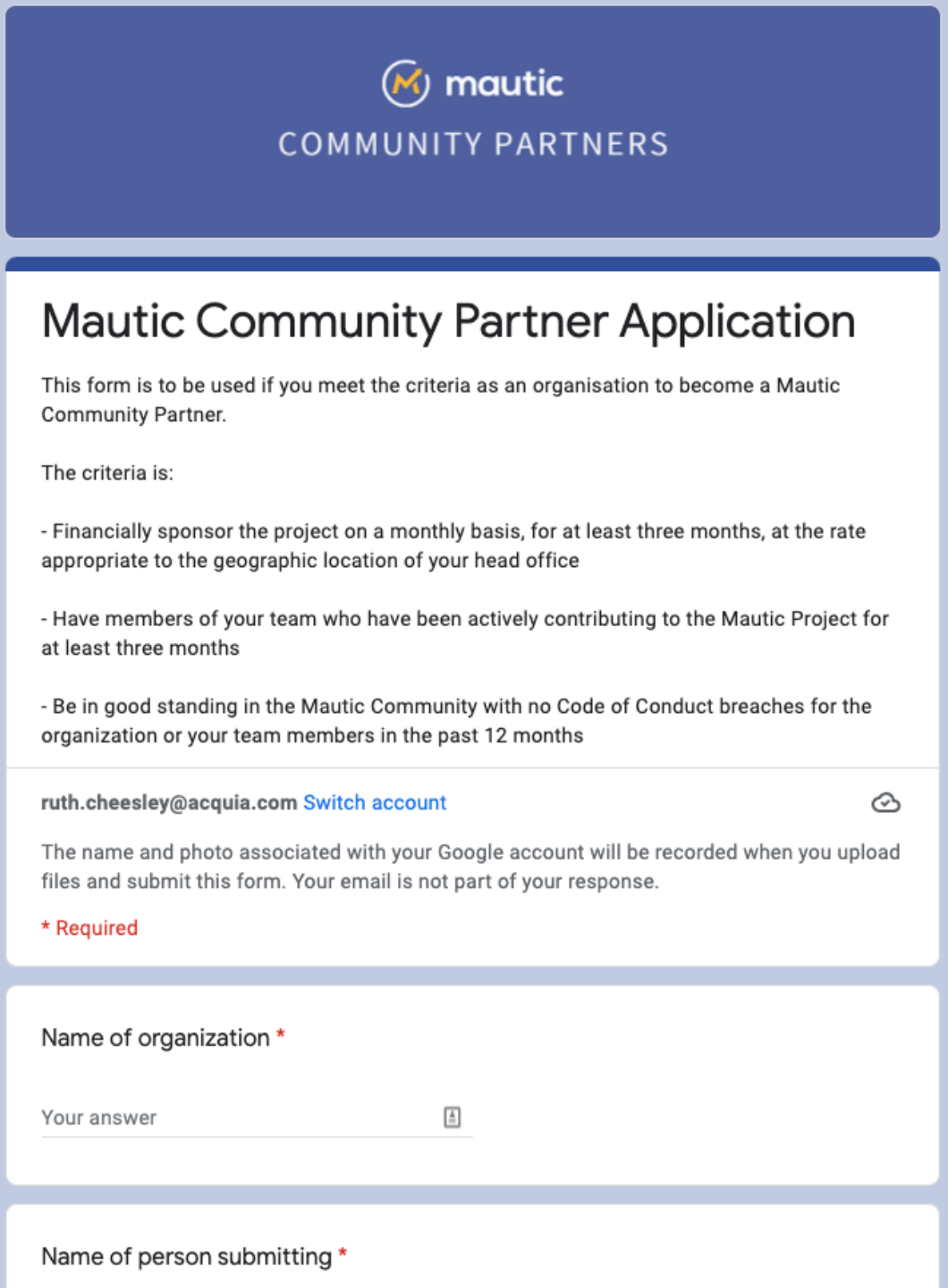
BECOMING A PARTNER

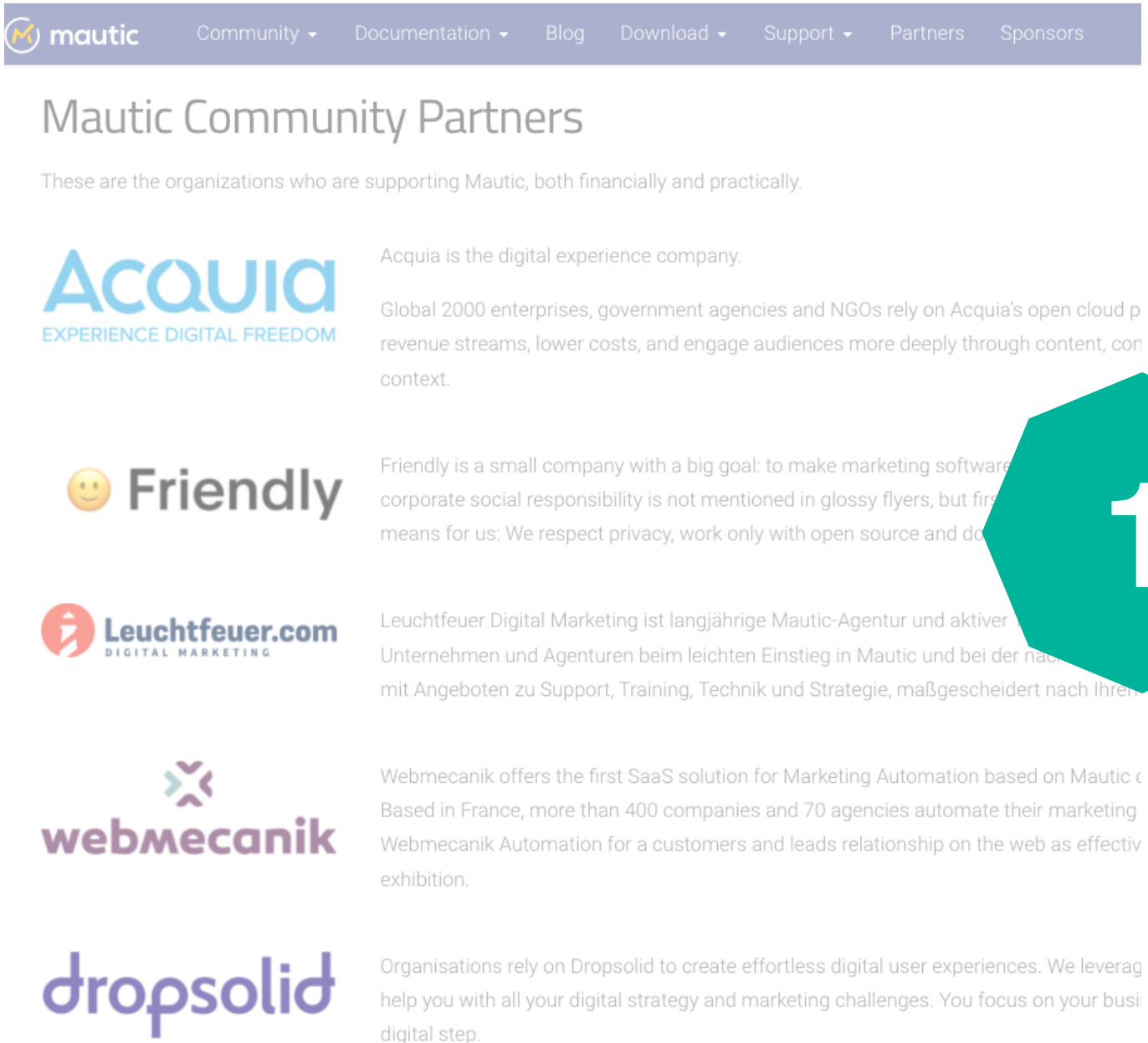
APPLY WHEN CRITERIA IS MET

MUST MEET MANDATORY REQUIREMENTS

- At least 3 months contributing to the project (evidenced in activity in Savannah CRM)
- At least 3 months contributing financially at the minimum level or above for the country of their head office or primary location
- No Code of Conduct breaches against organisation or team members over the past 12 months (tracked in Savannah CRM)

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1

PARTNER DIRECTORY LISTING

PROMINENT LISTINGS

- Each partner has a page in the directory including backlink
- Top 3 partners featured on mautic.org homepage
- Partners ranked by activity and contributions in the previous month
- Partners mentioned in all official conferences

ORGANISATION LISTING

SHOWCASE SERVICES AND CONTRIBUTIONS

- ✳Company overview
- ✳Highlight contributions
- ✳List active contributors
- ✳Quarterly activity graph
- ✳Relevant case studies
- ✳Promote partnership opportunities
- ✳Lead generation form

2

Acquia

EXPERIENCE DIGITAL FREEDOM

Acquia is the digital experience company.

Global 2000 enterprises, government agencies and NGOs rely on Acquia's open cloud platform to create new revenue streams, lower costs, and engage audiences more deeply through content, community, commerce and context.

For more information visit www.acquia.com or call +1 781 238 8600.

Services provided

- Cloud hosting
- DXP
- Managed Enterprise hosting
- Marketing Strategy
- lti-tenant installations

Mautic Contributions

Acquia is an active, enthusiastic contributor to the Mautic project, including:

- Employing a full-time Project Lead
- Marketing Cloud engineering team contributed the bulk of the work on Mautic 3
- Major contributor to key Strategic Initiatives

y Activity

t month

- heesley
- Alan Hartless
- Rahul Shinde
- Tejas Navghane
- John Linhart

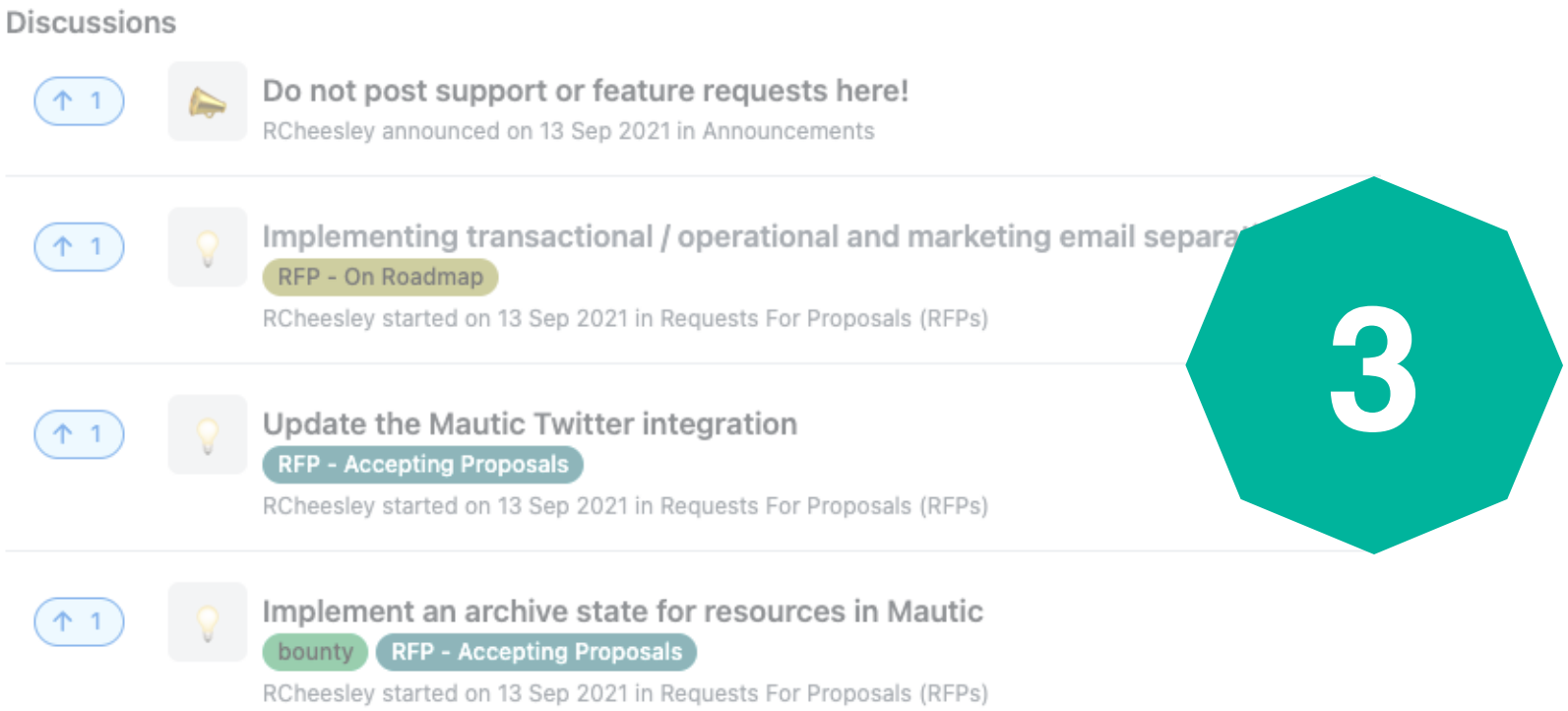
Activity over the last 90 days



Case Studies







3

ROADMAP PRIORITISATION

FEATURE REQUESTS

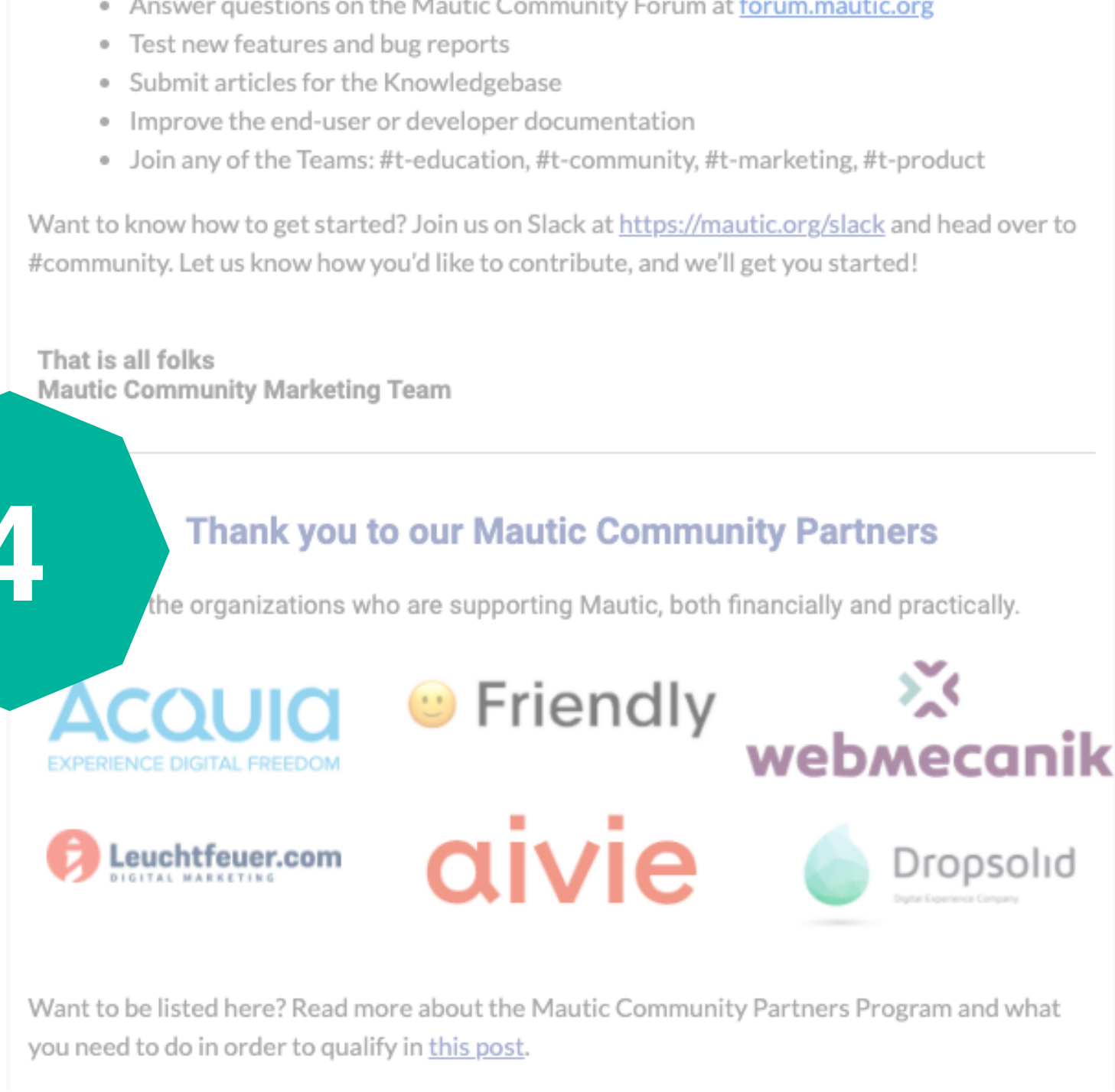
✳ Partners may submit up to three features to the Project Lead per calendar year (funded or unfunded) for consideration to include in the roadmap, without going through the community voting and prioritisation process

NEWSLETTER MENTIONS

PROMOTION ACROSS CHANNELS

- Social media and email promotion on joining
- Featured on every community newsletter with links to their partners page
- Re-sharing relevant news and content

4


- Answer questions on the Mautic Community Forum at forum.mautic.org
- Test new features and bug reports
- Submit articles for the Knowledgebase
- Improve the end-user or developer documentation
- Join any of the Teams: #t-education, #t-community, #t-marketing, #t-product

Want to know how to get started? Join us on Slack at https://mautic.org/slack and head over to #community. Let us know how you'd like to contribute, and we'll get you started!

That is all folks
Mautic Community Marketing Team

Thank you to our Mautic Community Partners

the organizations who are supporting Mautic, both financially and practically.

ACQUIA EXPERIENCE DIGITAL FREEDOM
Friendly
webmecanik
Leuchtfeuer.com DIGITAL MARKETING
aivie
Dropsolid

Want to be listed here? Read more about the Mautic Community Partners Program and what you need to do in order to qualify in this post.

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HOW HAS IT WORKED?

WE HAVE:

- Seen **significant uptake in sponsorships** from organisations
- Enrolled **six partners** with one in review
- Seen **sustained contributions** from partners
- **Gained new contributors** from new partners
- Enabled community members to **build partnerships with 'makers'** in the community, driving mutually beneficial growth of the ecosystem





WHAT DID WE LEARN?

TRANSPARENCY MATTERS

- Have clear policies and workflows to cover the whole process
- Be clear on expectations with promotion of partners
- Set clear content guidelines for their listing pages

Photo by Tim Mossholder on Unsplash

WHAT WOULD/WILL WE CHANGE

SOME THOUGHTS:

- Automate / embed as much as possible on the portal (currently fully manual process)
- Improve search/filter capabilities to include location, language, services offered
- Automated follow up if partners are declining in their activity
- Considering possibility of having a tiered program
- Sponsored content



MAUTIC PROJECT LEAD

RUTH CHEESLEY (she/her)

What questions can I answer?

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noti.st/rcheesley for slides, recording, links and resources.



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