



eBook

Building a New Online Community?

Lay a Strong Foundation with
4 Planning Steps

YOU WANT TO START AN ONLINE COMMUNITY –
HERE'S WHERE TO BEGIN



The best communities are thriving, engaging destinations that people want to return to again and again.

And the idea of a branded community is becoming popular. Organizations are seeing the value in building online communities to support their brand and customers. Maybe that's why you're here.

If you want to create a community program that thrives, engaging your customers, members, or employees, growing in ROI, and providing real business value, the first step is to **start with careful planning**.

So we're glad you're here, because this eBook is all about building a strong foundation: how to plan a branded community that will thrive, building loyalty among your members, customers, employees, or users.

We've launched thousands of communities – and we'd like to share that experience with you. We'll walk you through the planning phase of building an online community for your brand or organization.

We'll share information on creating a valuable community, setting goals and KPIs, selecting a community platform, and organizing your team. When you've finished reading, you'll have the information you need to create a community that will become a vital resource for your organization and your users.

Let's start with the 'why.'



Start by reminding yourself of the value of community – with a branded online community that encourages engagement at every stage of your user’s journey, you will...



Build Connections

Create vital connections with your users, unlocking collecting knowledge and engaging everyone in your community.



Retain Users

Keep your users coming back with personalized, relevant experiences from onboarding to renewal, growing them from everyday users into brand heroes.



Grow Your Organization

Whatever stage you’re at, a community helps you thrive, accelerating the growth of your organization.

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CHAPTER 1

Creating a valuable community

When someone joins a community, what are they looking for? Maybe it's insider knowledge, an answer to a question, or a sense of camaraderie. Although some online communities have unlocked the secret of an engaging community, others struggle to create a community that's truly valuable.

If you want to build a successful online community for your organization, the first step is **why** – let's get really introspective here.

Why do you want to create a community, and how can it help your organization and your members?

You'll need to understand goals that various stakeholder groups are striving for. That's not only among users– it's also among your internal team and leadership.

Overall, the community's goals should be driven by both your organization's and your users' goals.



WHAT'S IN IT FOR YOUR ORGANIZATION?













Maybe you came to this with your company's goals in mind, maybe you came to it with your members, customers, or employees' goals in mind. We'll walk through both.

You want to provide a platform for your users, but you should understand your own goals, as well. Communities can be useful for all levels of an organization and for many different teams. How will the community be useful to your organization, and what do you want to accomplish?

Perhaps you want to use it as an opportunity to gather feedback from users. Maybe a community is a large part of your offering. There are many different reasons to start a community, but you have to find yours.



A branded online community can help your organization with any of these use cases – often, accomplishing many at once.

- | | |
|---|---|
|  Support |  Events |
|  Enablement |  Program or Product Adoption |
|  User Groups |  Program or Product Feedback |
|  Advisory Boards |  Communities of Practice |
|  Onboarding |  Improving Retention |
|  Advocacy |  Building an Industry Hub |

Learn more about the value of communities for organizations in The Community Roundtable's eBook

COMMUNITIES POWERING CHANGE →

Their research shows how communities are empowering online collaboration, eliminating organizational bottlenecks, and increasing efficiency – for all types of organizations.

Sometimes, people think of communities as a siloed offering, relegated to one team, like marketing or support, rather than part of the organization as a whole.

However, different teams at your organization can overlap your goals so that strategies are working in tandem. And getting this figured out at the beginning will help you make sure your community effort succeeds in the long run.

Here's what you'll need to do:

IDENTIFY YOUR ORGANIZATION'S BIG PICTURE GOALS

Find out your company's goals and priorities. This will help you understand how community fits in, and how your online community can serve those goals.

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INTERVIEW DEPARTMENTS TO UNDERSTAND GOALS AND PRIORITIES

Community can easily support the goals of multiple department. For example, if you pick an online community platform or software that offers **resource libraries** (education), **volunteering and advocacy tools** (membership, customer success, marketing), **product ideation** (product and customer success), **discussion threads** (enablement, success); you can provide tools to address multiple use cases in one platform.

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GET BUY-IN BY WEAVING IN OTHERS' IDEAS

Make your community indispensable to your organization by getting buy-in and weaving it into your priorities too.



Check the end of this chapter for a how-to guide on this process and sample interview questions



Consider What Will be Valuable to Your Users

Not only should you consider why your organization needs an online community, but you should also make sure you're providing a community that appeals to your users. Why would these users join? What will they get out of it?

Delivering an indispensable, engaging branded community that people want to come to again and again begins with determining the “jobs” that will motivate your users to come to the online community.

We've found that people typically join communities because they want to continuously learn, develop a sense of belonging, and gain exposure.

To build your community, you can think about how they'll access the community, what content they'll engage with, and how they'll communicate:

ACCESS | How do they like to communicate?

CONTENT | What type of content do they find valuable?

COMMUNICATION | What holds them back from communicating and collaborating with their peers and your organization?



Building Advocates, Early

When you involve users, members, or customers at the beginning of the process, you're building advocates by giving them buy-in. Communicate with them as a special group as you move forward. You can lean on this group to be beta testers and early adopters.

The community you create needs to feel like it belongs to your users, not to you. You'll benefit from it, of course, but your users – and their needs – have to come first, if you want it to be a success. But you can marry your organizational goals with what will be valuable to your users.

For example: Your organizational goal might be to “become a resource for users in the industry.” Your users might be craving support and connection with other customers or members. To solve both of these in one, you'd use the online community to provide a private, members-only area including exclusive content like blogs, discussions, and file libraries.

How to Identify Your Organization's and Users' Goals

Fortunately, figuring all this out doesn't have to be guess work. Use a strategic process to interview key stakeholders across your organization to understand what you need to accomplish, using the **Jobs-to-be-Done Framework**. Determine the “jobs” that motivate you to build an online community.

The Jobs-to-be-Done Framework in 5 Steps

- 1 | Determine the Main Jobs everyone is trying to get done.
- 2 | Categorize the Main Jobs.
- 3 | Determine the Sub-Jobs and Desired Outcomes and prioritize.
- 4 | Select tactics and community platform features to get the Job done.
- 5 | Build your Community Strategy and Roadmap.

You should do this process with both your internal staff and your community end-users (whether they're members, customers, employees, or other users).

Use the following interview questions as a template. These aren't community specific, but that's okay. If you currently have a community and you're trying to migrate or re-launch the community, you could customize these to get at current issues or problems they're facing with the community. For example, an adapted question might be, “tell me about a challenge you have with the community.”





TIP: When the interviews start to sound the same, you've talked to enough people.

INTERNAL (ORGANIZATION) INTERVIEW QUESTIONS

- Tell me about your role at the organization.
- Tell me about a challenge you're experiencing.
- What makes the job time-consuming?
- What technology tools are you using to get these jobs done now?
- What's the final result you're trying to achieve?

EXTERNAL (END USER) INTERVIEW QUESTIONS

- How long have you been a customer of [org]?
- How did you decide to become a customer of [org]?
- How do you use our products/services?
- Are there features/services you use all the time? How?
- Tell me about a challenge you're experiencing as a customer of [org]?
- What makes the job time-consuming?
- What technology tools are you using to get these jobs done now?
- What's the final result you're trying to achieve?

CHAPTER 2

Setting goals and KPIs

Before you launch your online community, you'll want to set goals and key performance indicators (KPIs) so that you can make sure you're on track. Define these at the outset so that you can measure your results – and ask vendors specific questions about what kinds of analytics their platform can provide.

You can measure **engagement metrics** (metrics you'll generally find within the community platform, like logins) and **business metrics** (metrics you'll find by looking at broader business numbers, like retention rate).

Engagement metrics measure how active your community is, while business metrics measure the business impact of the community.

When you come up with metrics to track, make sure you're matching them to your goals.



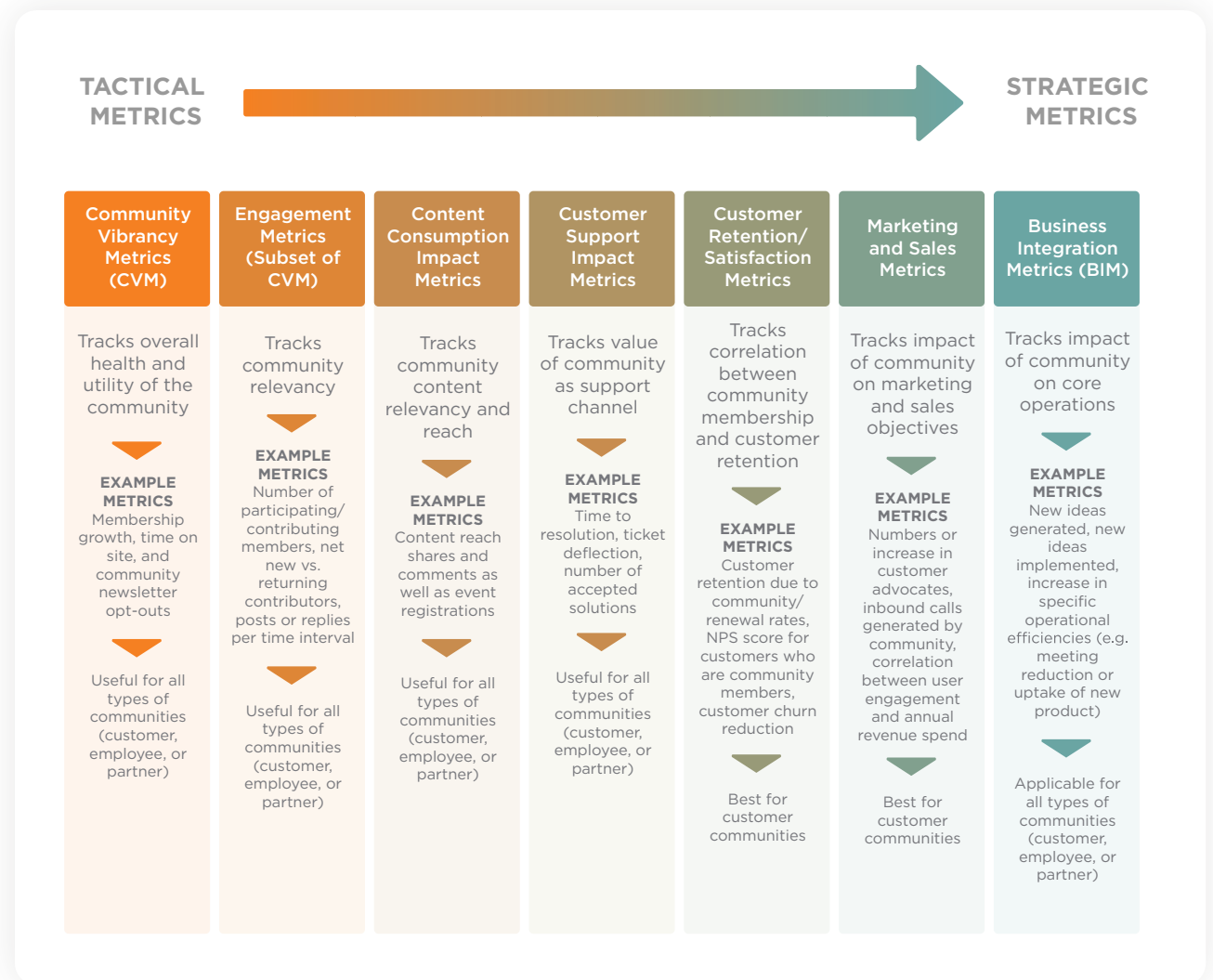
For more tips and trends surrounding online community engagement, check out the **2020 Engagement Trends Report**

DOWNLOAD NOW →

For example, if you want to increase operational efficiency on how you manage your events, look at how you currently do this and how you measure success, and create new KPIs that will help you measure how this is done in the community.

As you go, you'll want to define baseline KPIs and target KPIs. You'll want to track several metrics, but all should fall under engagement metrics or business metrics.

Leader Networks illustrates it like this in their Community Impact Framework. The first three metrics showcase engagement metrics, while the last three showcase business metrics.



Source: Community Impact Framework, Leader Networks



Engagement Metrics

Engagement metrics will tell you how successful your community is by helping you understand how many people create, respond, and interact with content.

THERE ARE TWO KEYS TO MEASURING ENGAGEMENT:

KEY #1: MEASURE ON A REGULAR BASIS



You'll need to measure engagement on a regular basis in order to see how your community is doing over time. While you can measure engagement on a monthly basis, we recommend measuring quarterly. This is because a user's engagement may vary a lot month-to-month, but much less if you look at it on a quarterly basis.

KEY #2: MEASURE THE RIGHT THINGS

You won't be able to gain insights unless you measure the right metrics. What do we mean by the "right" metrics? It's the metrics that map to your goals – if one of your goals is to provide a resource hub, see how often those resources are being downloaded. Either way, these measurements will help you evaluate whether the community's actually being used and relied on.

Here are some engagement metrics you can track (if your community platform provider makes them available):



Community retention and use

-  Logins
-  Agreed to terms



Consumption

-  Pageviews
-  Contributor vs. consumer vs. inactive

Engagement

-  Discussion posts
-  Library uploads

Perception

-  Quotes/comments from members
-  Emails to you



Business Metrics

Again, your organization's goals should drive the business goals you'd like the community to achieve. For example, if one of your organization's "jobs" is to increase retention, you'll need to figure out a way in advance how you're planning to calculate that.

The same principles apply here: measure on a regular basis, and measure the right things.

Review these ideas for business metrics you might use, by use case:

Satisfaction and Advocacy:

- Average Net Promoter Score of those who engage in the community vs. those who don't

Retention:

- Retention rate of those who engage in the community vs. those who don't
- Average lifetime value of those who engage in the community vs. those who don't

CHAPTER 3

Selecting a platform

Before you can build your online community, you'll have to decide which platform will be the right fit.

But before you start making a list of potential solutions, you should know what you need the platform to do. This is where the work you did to determine the goals comes in handy.

Once you have well-defined organizational requirements, you'll be in a good position to jump into research. Based on your organization's needs, research the different features and functions included in each potential platform to make sure it has everything you want.

For platform ideas, try reviewing industry sites like **G2** and asking your network for community platform recommendations.

Once you have your needs outlined, adapt our vendor checklist based on these needs.

The Case for a Proprietary Community Platform

You might be considering using an open source solution or a social media platform to create your community. However, we recommend using a proprietary community platform, for several reasons:



More control: If you create your community on social media or open source solution, you're subject to any and all of their changes, with no say, effectively building your house on rented land.



More security: Community vendors place privacy as top priority – it's their job. With a Facebook or LinkedIn Group, you have a limited ability to protect your members' privacy and your own information.



More data: On a social media platform, they gain invaluable data that your community will inevitably generate about your members and customers – you don't. If you create your own online community, you'll have access to all that data, helping you understand your users and create an enriching experience for your users.



More community management tools: With a community platform like Higher Logic's, engagement tools are built in, specifically designed to help you create an engaging experience.



VENDOR CHECKLIST

Choose the best online community software

- Can the platform support your goals?
- Can the platform support multiple use cases?
- Does it have the functionality needed to accomplish the use case you need?
- Is it easy to customize the platform and brand it?
- Does engagement come naturally? What built in tools exist to make it engaging?
- Does the platform integrate with your user database? This could be a Customer Relationship Management system like Salesforce or Oracle, or it could be an Association Management System like iMIS or YourMembership.
- Can the platform provide a personalized experience for users?
- Is vendor innovative and forward thinking?
- Do they offer any services to help you launch your community or staff it with a community manager until you can hire one?

DOWNLOAD OUR TIP SHEET: THE 10 MOST IMPORTANT QUESTIONS TO ASK ANY CUSTOMER COMMUNITY VENDOR





CHAPTER 4

Organizing your team

Once you've set your goals, defined your KPIs, and chosen a platform, you'll need to assemble your team for a community launch. To do this, decide on the size of your team, choose roles and responsibility, and determine where the community-building resources will come from.

DECIDE ON THE SIZE OF YOUR TEAM

Don't be overwhelmed if the task seems daunting. Many successful communities have been launched with one community manager. The key is to figure out what you need. You may be able to start with a small and nimble team, but you should be prepared to hire more people or dedicate more resources as the work increases. Identify your gaps and the skills you already have among the team available to you, and then fill them.



Don't have the resources or expertise you need to launch and manage your community?

Some community vendors will offer this as a service – for example, we have a team of industry leading community managers available at a variety of service tiers to help you launch yours.

DECIDE ON ROLES AND RESPONSIBILITIES

Although you may have many people involved, divvy up roles and responsibilities so that everyone is clear on what they're supposed to do. You might want an entire department to be involved in your community, but that doesn't mean that department needs to own it.

If there is a problem, you'll know who to turn to. No matter what, make sure the community is owned by someone or a department – you'll need a final decision-maker leading the team through the process.

DETERMINE WHERE RESOURCES WILL COME FROM

This is the tricky part – who's paying for it, and who will own it?

Ideally, you'll have gotten a good sense of who will be most involved, internally, during your research process.

For example, if the marketing team will use the community the most, it might make sense for it to come from their budget. If it's an even split between departments, see if the budget can be split as well.

Figuring this out will take some discussion, but relying on the research you did will help you make your case.

Do you need a community manager?

Every organization needs at least some dedicated management. That being said, most small organizations do not need a full-time community manager. But a large organization with a lot of customers, members, or users most likely will. Community management can be a part-time position that could be taken on by someone at their organization.

The bottom line is it's less about the number of hours as it is about the experience level of the person who's managing the community. For example, a person with more experience will need fewer hours to be highly effective, while someone with less experience will have to spend more time learning and executing effectively.

For more insight, check out The Community Roundtable's research on their eBook, **Community Management: Understanding Roles and Responsibilities in 2020.**



Ready, Set, Start Planning

Planning an online community can seem overwhelming, but it doesn't have to be. By following the steps outlined in this eBook, you'll be well on your way to planning a community that provides values to your organization as well as your users.

If you have questions, reach out. We'll be happy to help.

Interested in seeing a demo of the Higher Logic platform? Drop us a line, and we'll set something up.

LET'S CONNECT

