

BUILD A THRIVING COMMUNITY

WITH YOUR
CUSTOMERS AND
PARTNERS




SELL. SERVICE. MARKET. SUCCEED.



“Customers in customer communities spend on average **19% more**.”



Are you leaving money on the table?



**If you build it,
they may
not come**

Too Many Communities Suffer From The “Empty Bar Syndrome”

This is what usually happens:

- User visits community
- User sees no content and no interaction
- User doesn't understand what it's for or how it's relevant
- User leaves never to come back

Enemies Of Community Adoption

- “Build it, they will come” approach
- No focus on change management or community management
- No connection to business process; community exists in a silo
- Lack of executive vision, sponsorship and engagement
- Lack of (middle) managerial commitment

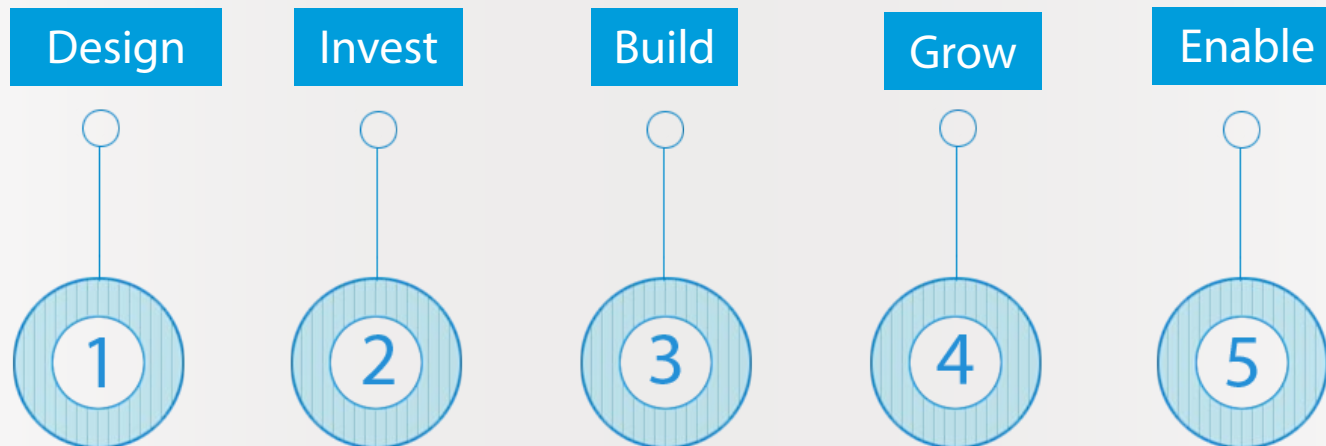


We Created This Adoption Guide To Help You Avoid This “Empty Bar Syndrome”

This short Adoption Guide is for those of you who want to make your community for external stakeholders a success – whether you are a formal or informal community manager.

What you’ll get out of this Playbook... You’ll learn how to build a community of action that people want to be a part of, design and roll out the community, and enable key stakeholder groups.

To make it easier, we’ve broken down the adoption process into five main phases:



During the rest of this book we’ll follow these steps as we learn how to launch a community the right way.

1

DESIGN: CREATE A VISION AND A PLAN

A successful community meets the needs of the business and its members. This doesn't happen by accident. You need to explore the needs of your business and your members and create a blueprint for success.



Get To Know Your Potential Members: What Do They Need?

The best way is to ask them. Make sure to also spend time listening to customer-facing employees in your organization. Know answers to the following:

- What do they need? (*That they can and can not verbalize?*)
- What do they seek from the overall relationship with your company?
- Why will they visit your community and why will they return?
- Why will they participate / contribute? What's their WIIFM (what's in it for me)?
- What else is competing for their time?
- What value can the community provide that no one else can?
- What's their passion? What's their identity? How does the community align with it?

❖ Map out a few member “personas” and answer these questions for each persona.



Start with Why: Answer These Two Questions

What's in it for you?
(the business)

What's in it for them?
(your community members)

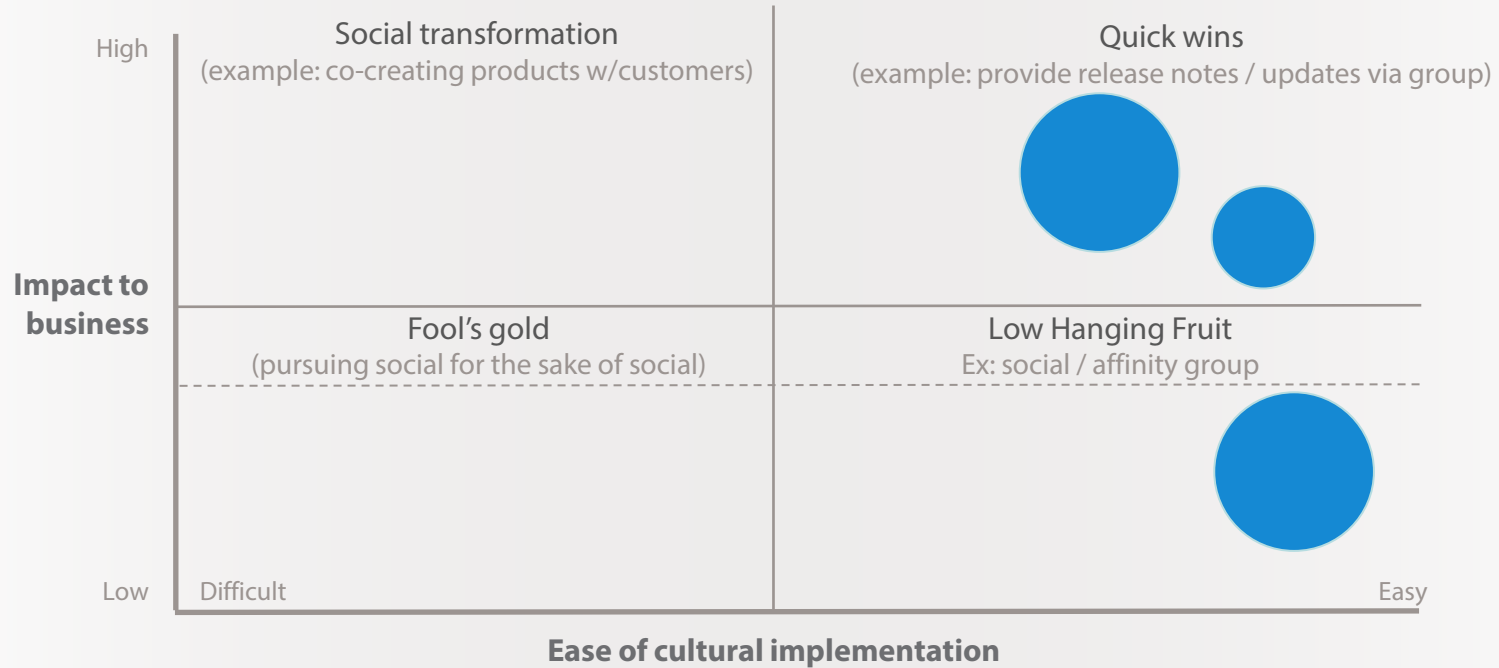
Find a few of these overlapping goals and map out a couple of *experiences* (use cases) to help reach these goals. Here's an example:



"We started the Salesforce Success community as a way get the right information into the hands of our customers and support small to medium sized businesses. We also wanted to partner with customers on developing our products. We did that through a Q&A portal and IdeaExchange" – Erica Kuhl, [Salesforce Success Community](#)



Prioritize Experiences (Use Cases) You Mapped Out



- ❖ Assemble a group of stakeholders and advocates – your *Brain Trust*. Work together to brainstorm and develop a few use cases and prioritize them. Focus on Quick Wins to create value and Low Hanging fruit to draw people in.

Don't Do Too Much From The Get-Go: Think Of Use Cases As "Wedges"

Be careful to not boil the ocean; think of these use cases as a wedge to expand into other experience and scenarios – to a hub for your entire ecosystem.

Don't pile on a lot of change – it can overwhelm people and defeat your objective. Focus on use cases that can "grease the train tracks" and *create conditions for transformation*. A good "wedge" use case is:

- Impactful
- Easy to implement
- Value is apparent and easy to describe
- Observable -- public
- Magnetic --- people are drawn to it naturally

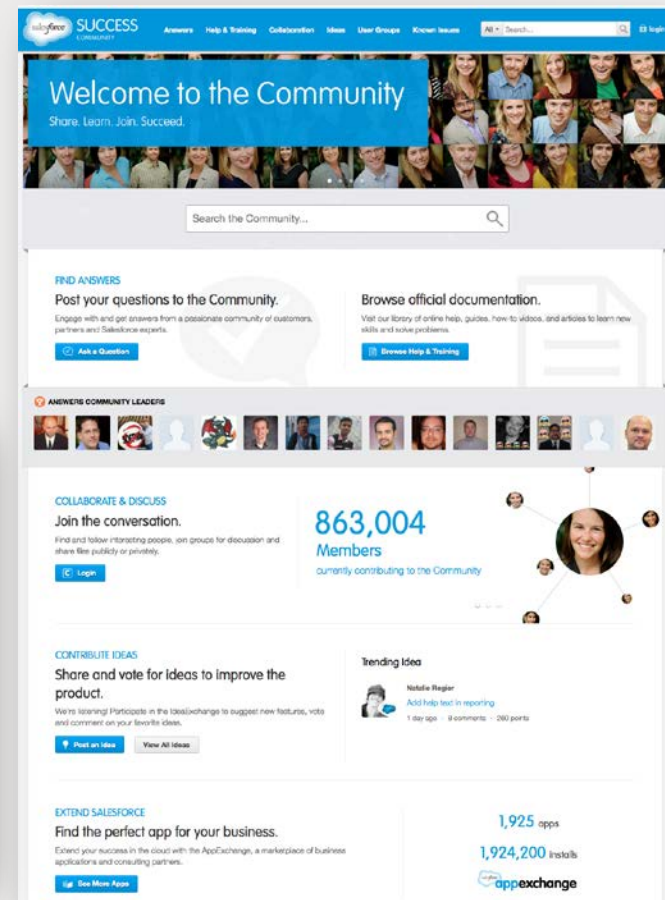
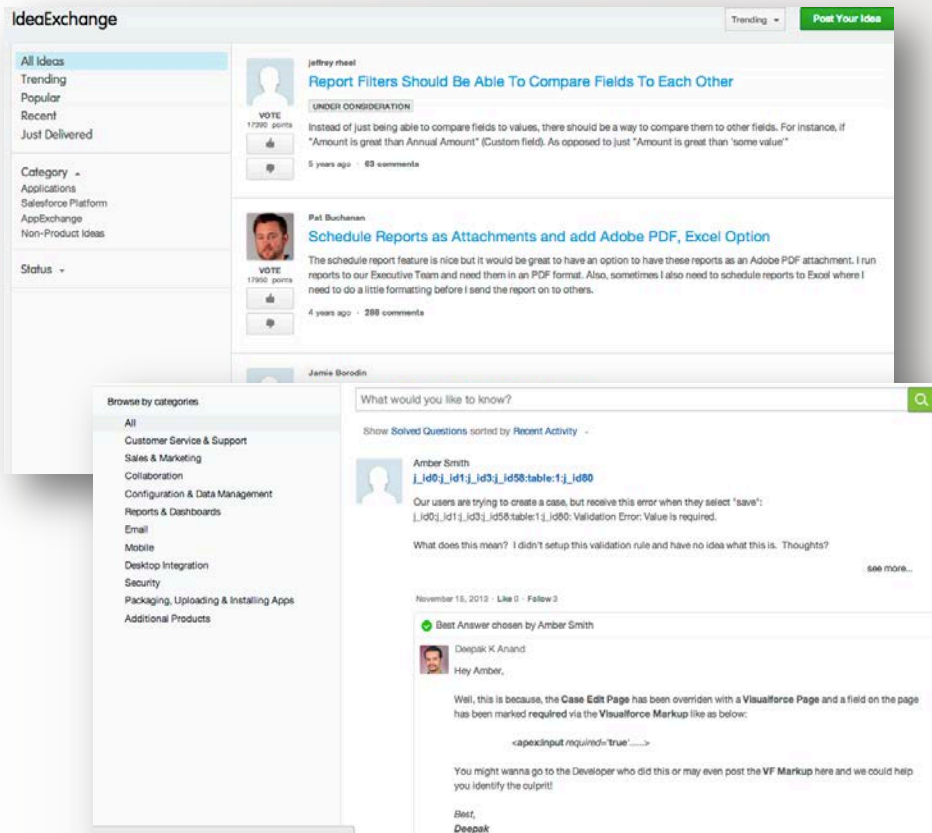


Top Tip: See if there's an existing community already and see if you can align your use cases to that.

Example: From Simple Use Cases To A Whole Experience

Salesforce Success Community started with Ideas and Q&A..

...And evolved into a full-fledged hub for the Salesforce ecosystem

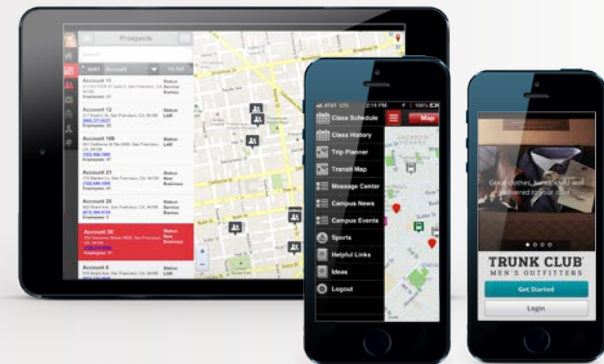


Address Technology: Design A Frictionless Experience For Web And Mobile

Now is a good time to make technology implementation decisions.

These decisions should help you drive and encourage the right behaviors and should be aligned with your use cases:

- How can you provide the most seamless experience for your customers and partners?
- How do customers / partners interact with you right now – what are the touchpoints?
- What kind of UI will be most useful to members?
- What existing systems do the users use already? How can you integrate?



❖ Identify existing technologies that should connect to your Community for a seamless experience.



Think Of Providing A Frictionless Experience: This Is What A Partner May Need

Partner Community



Home Leads Opportunities Dashboards Fund Requests Channel Plans

GLOBAL SEARCH

Community Search

MY PROFILE

Welcome!



James Preston

QUICK CREATE

- Account
- Contact
- Event
- Lead
- Opportunity
- Task
- Case

MY APPROVALS

Jessica Cullen	Pending
Ian Brown	Pending

LEAD INBOX

Name	Title	Company	Source	Action
John Stivender	CFO	Doster Construction Company Inc.	Google Adwords	<input type="button" value="Accept"/>
Adan Horst	SVP Marketing	Kenworth Sales-Missoula	Web Referral	<input type="button" value="Accept"/>
Rick Mui	EVP Business Development	Manias River Electric Co-Op	Jigsaw	<input type="button" value="Accept"/>
Lorraine Boettcher	VP Sales	Meredith Construction	Jigsaw	<input type="button" value="Accept"/>
Tenisha Mabery	Owner	J R Gillis Assoc	Web Direct	<input type="button" value="Accept"/>

NEWS FEED

Post File Blue Jeans More

What are you working on?

Sort By Post Date



Harmon Manufacturing: 80K — Terrance Peterson (Precise Solutions)

Here are the materials from the last customer meeting. It looks like we'll have to compete against Metrix solutions.



Harmon Manufacturing Meeting
Download pdf (657 KB) · More Actions

Comment · Like · Today at 2:48 PM

MY LEADS BY STATUS




POPULAR TOPICS


Corporate Tablets	14
Metrix Solutions	14
Competitive	11
MX LCD	11
Dynasharp TV	10

MY GROUPS

- Selling: Conference Products
- Partner Connect Conference
- Partner Lunch and Learn
- North American Resellers
- Mobile Configuration
- Onboarding


Frictionless Experience: This Is What A Customer May Need


FordSocial



Ford
 Grab a badge >

OUR ARTICLES
 YOUR STORIES
 YOUR IDEAS
 IMAGES
 VIDEOS

Search Ford Social


LATEST ARTICLE FROM FORD

AUG 06



Reunited and it Feels So Good

Charlie Snearly, 8/06/2013

You may have seen [this viral video](#) making the rounds recently. It's a classic feel-good story: a man is reunited with his Ford Mustang thanks to his resourceful family and the internet, many years after he had originally sold the car.




Since we know that our community loves the Ford Mustang, Ford Social dug deeper, we talked to Rick and Michael Lookebill to get the story behind the story.

First, you should know that this 1972 Mustang Mach 1 was not just one of Rick's cars; it was the first car he ever purchased. Second, he didn't decide to sell it. He had used the car as collateral on a business loan, and when the business closed, the car was sold with it.

RECENT COMMENTS ON THIS ARTICLE

You're the first to comment on this. Have at it!

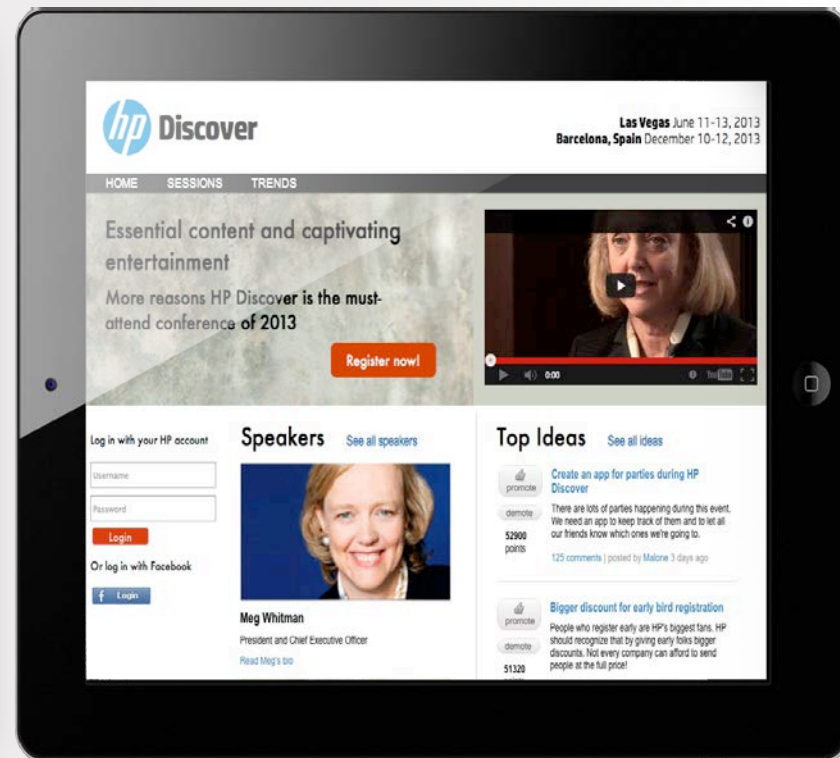
SIGN IN
 REGISTER NOW

ABOUT | BLOGS | EVENTS | LINKS | RSS | SOCIAL NETWORKS
 



Example: HP Healthcare Community With Partners



Example: HP Community With Customers



Let's Put It All Together!

Your Action Plan:

1. Examine user needs (see appendix)

2. Examine your needs and business goals

- Short term and long term
- Which business goals can the whole company rally behind?



3. Brainstorm use cases and come up with a few experiences you want customers to have in the community:

- Select your “brain trust”. They should work in a department closely related to the community and believe in community. This is not (yet) the time to convert nonbelievers
- How will you achieve these business goals? What are the processes and people necessary? If “increase quality of customer support” is a goal, then what are the specific things that will happen in the community to address that?
- Remember to rank them and start with Quick Wins and Low Hanging Fruit

2

INVEST RESOURCES

How can you expect results from a community if you don't invest in it? At the very least, you need to have a community manager in place who is responsible for the health of the community.



Set The Right Expectations For Resources & Culture

What You Need

Community Manager

While everyone should contribute to the community – if no one is responsible, how can it be successful?

Executive Sponsor

Helps legitimize the effort and galvanize the rest of the organization to participate

Resources

Budget, technical resource, community team

Why Community Is Different

- Focus on building relationships beyond transactions
- Shouldn't be measured like other digital initiatives - - it takes time to build
- Slow rollout is good, so set right expectations for measurement
- Needs daily investment - don't set it and forget it

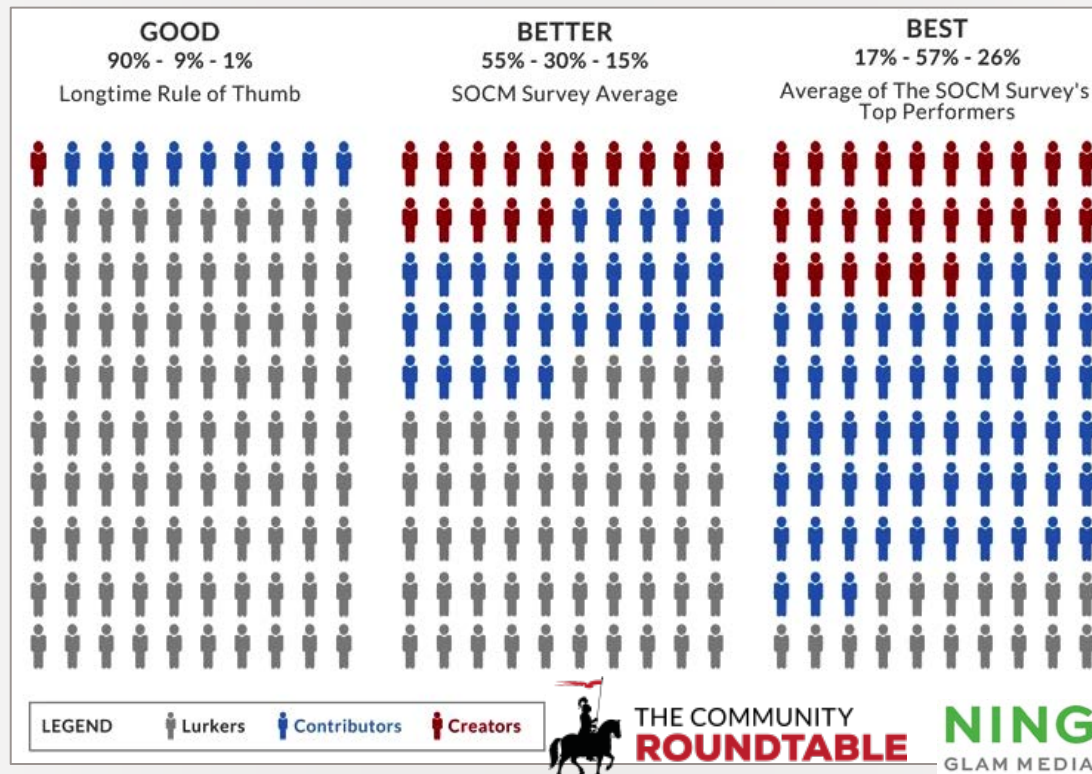
What Community Isn't

- One way broadcast or "messaging" to customers
- Ignoring and deleting posts you don't like
- Being the center of every conversation
- Simple transactional tech support
- Eyeballs and views

But.. Don't Communities Run Themselves?

In case you need data to support your ask for a dedicated community manager (whether that's you or someone else), check out the [State of Community Management Report](#) from Community Roundtable. It shows that community managers dramatically increase engagement levels.

Community Engagement Standards



What Does A Community Manager Do?

- Sets strategy and ensures value
- Measures impact
- Voice of community & company
- Facilitates, connects
- Leads inside and outside of the org
- Curates and celebrates
- Promotes shared purpose and ownership
- Builds engagement
- Grooms Champions to lead
- Promotes productivity
- Limits destructive behaviors

❖ identify your community manager. How many will you have? What's the mix between strategist and hands-on manager? Where in the organization does the community team report?



Community Managers Turn “What If’s” Into Opportunities

Common What If’s

- Information leaks
- Complaints
- People stealing your ideas
- Losing control of conversation



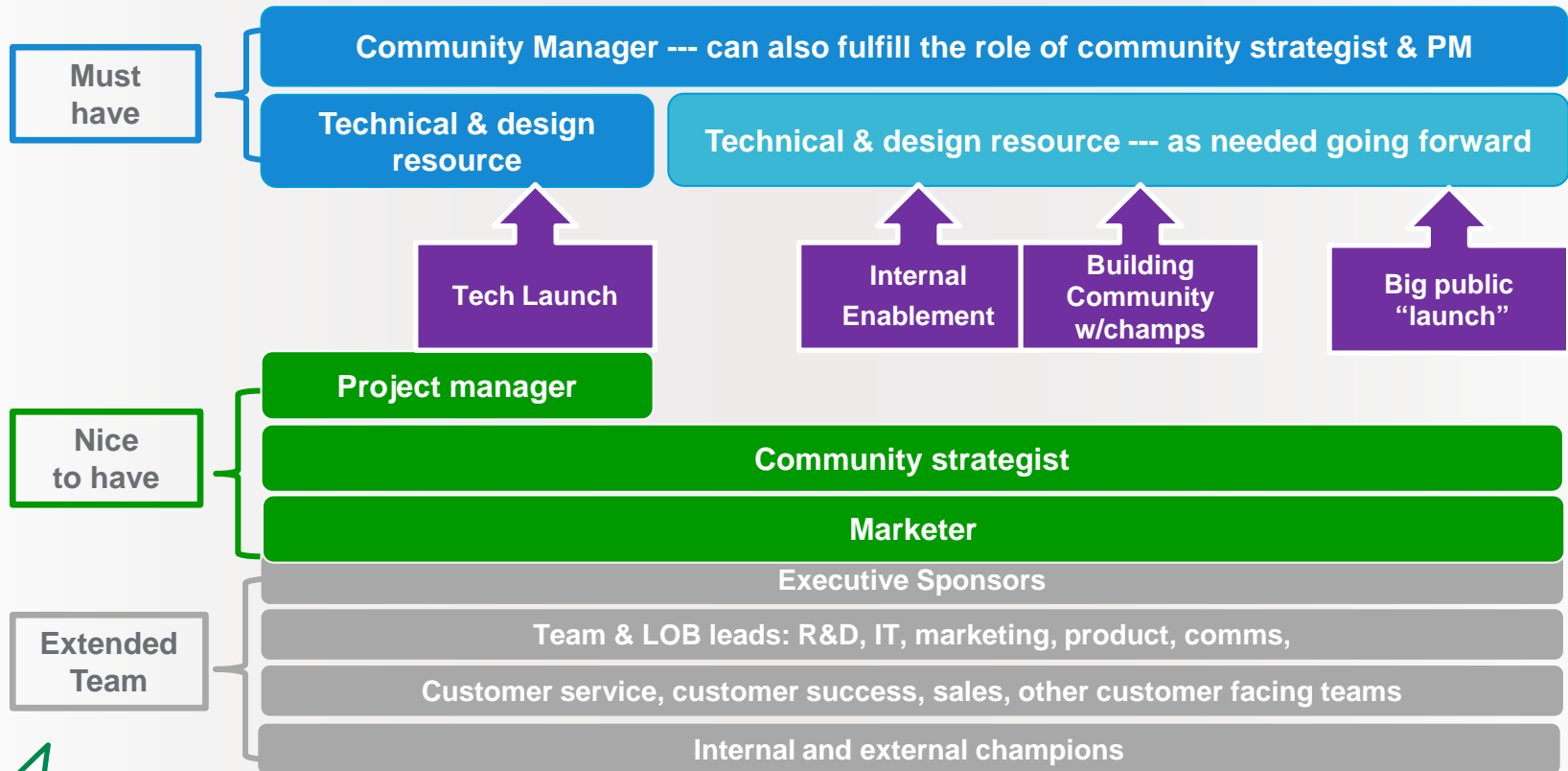
Opportunities:

- Provide proper training & governance
- Create advocates
- Promote productive conversation
- Accelerate innovation and knowledge transfer

❖ identify your organization’s What If’s and how community management can resolve them.



But You'll Need More Than Just The Community Manager: Community is a Team Sport



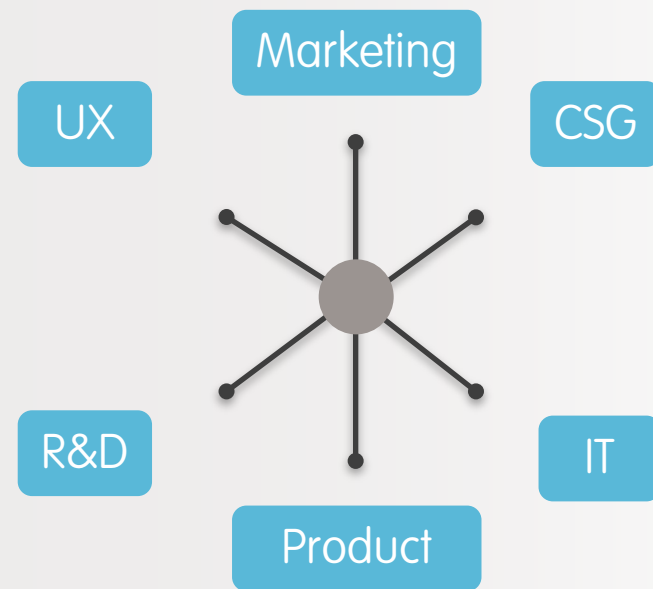
❖ Identify your core team, extended team and key participants.

How We Rallied Salesforce Behind Our Customer Community Vision



"I created a tight, attainable vision statement, which clearly stated the benefits to us and the customers. I drew up two documents – a future/vision focused Power Point and a functional document with more technical specs to get it done. I then met with all key stakeholders to present the vision statement.

We then created a team that was critical to achieving this goal that included key stakeholders from R&D, Platform, Marketing, IT, Customer Success and User Experience." – Erica Kuhl



Let's Put It All Together!

Your Action Plan:

Write out a plan and be explicit about the vision and goals for the community – and how you will reach them.

From your list of supporters, select an executive who may want to sponsor this effort. Secure their participation:

- Communicate their role and agree on mutual expectations
- Share your plan and make sure to paint a realistic picture of expectations and resources needed

Make technology decisions that align to your plan.



Build out your team. At the very least, you'll need people from the “must have” list.:

- You may be fulfilling the role of a community manager yourself or you may have a dedicated resource
- If you can't get a full-time resources, make sure it becomes part of someone's formal job description – even if just part time

Recruit your extended team:

- Technical resource – probably someone from IT
- Bring HR and internal comments into the fold
- People to “own” use cases you outlined
- Execs to champion these use cases

Continue to evangelize internally to garner early support for the cause.

3

BUILD: START SMALL, BUILD IT WITH MEMBERS

Don't try to boil the ocean. Start small, gather support, build community with community members, and start proving value.





Don't launch...yet

Roll Out Slowly, In Phases

Launching your Community isn't like a traditional IT launch – just because you build it, doesn't mean they will come.

Because you are changing behaviors inside and outside of your company, don't attempt a wholesale transformation all at once.

While you want to make the technology platform available to the right people – don't advertise it widely just yet. Give it some time to build!

Let's take a look how to stage your rollout.

Show – Don't Tell – the Value

Here's how you avoid the “empty bar syndrome.”

1. Show -- don't tell – the value of community to each new member. Help new users say *“Aha! I get it!”* upon their first interaction.
2. To do this, you want to start small and focus on your “wedge” use cases.
3. Tie it to people's existing experiences and touchpoints – because no one wants to use yet another site.



How Do You Start?

Who's going to build this community?
Assemble your council of *Founding Champions*. The process of building community *with* community members creates trust and strengthens.

- Shared ownership builds engagement and drives better decisions
- You can't foresee everything
- Peer to peer evangelism is more authentic than top-down
- Your members know what they need better than you do
- Your Champions' behaviors inform how future members behave



"We've built everything with community as they always have the best ideas. For example, our user group program started as a member idea and is now a thriving program with 165 global groups and 60k+ members. We are constantly looking for feedback on the community itself through our innovation platform IdeaExchange, where the community surfaces and votes on features they need." - Erica Kuhl



Becky Webster (Acumen Solutions)

I am SO excited. HUGE shout out to @Erica Kuhl (salesforce.com) and her #Awesome team for successfully launching this amazing new Community. It feels so good to be able to find, connect, and communicate with each other in such a fluid manner. Thank you, thank you, thank you!!!!!!

Topics: [Awesome](#), [Salesforce Community](#)

Start by Building a Champion Army Of Your External Stakeholders (Customers or Partners)

Your **external Founding Champions** should be:



- Existing customers (or partners)
- Bought into vision of company and community
- Have a track record and passion for helping others
- Varied across job types, company sizes and industries
- Willing and able to build and evangelize
- Knows social; possess the right etiquette

“To find our customer and partner champions, we looked to a variety of social and community channels, including top contributors in our Q&A forums, bloggers, customer speakers and user group leaders. As community grew, we looked to most engaged members who and those who were active in social channels.” – Erica Kuhl

❖ Identify and get your external Founding Champions on board



Mobilize Your Internal Champions Too!

It's just as important for key internal stakeholders to be represented in your community's design. Your **internal Founding Champions** should:

- Be natural connectors and influencers
- Be in customer-facing positions from across company
- Have a vested interest in community
- Be willing and able to build and evangelize
- Possess the right etiquette and understand social



"Early on, we identified our internal champions as employees who were answering q's, posting content and ideas and responding to ideas. As we launched our community on the SFDC platform, we saw a huge uptick in employee engagement as they could now create groups and collaborate openly outside of formats of Q&A and Ideas."

"–Erica Kuhl"

❖ Identify and get your internal Founding Champions on board



To Do

Lead Your Champion Army

Now that you've identified your Founding Champions, here are some things you can do together to kick things off.

Mobilize

- Meet in small groups and 1:1
- Share vision and validate plan
- Secure participation
- Create a private work group for deep collaboration
- Create a regular cadence of virtual and in-person meetings

Align

- Co-create vision statement and “elevator pitch”
- Agree on milestones and what success looks like
- Create a plan to execute your “wedge” use cases
- Agree on mutual expectations

Structure

- Build out the right groups, infrastructure and content for your plan?
- Plan some programming
- Decide how you will invite the next wave of users
- Structure reward and recognition programs; identifying Superusers
- Decide how you will onboard new users


Start Working On Your Use Cases In Groups. Here Are Some Best Practices To Set A Good Example


1. Be clear about purpose: which use case it supports, what's the goal? Who is it for?
2. Create a clear name and write up the description
3. Select at least one group manager to step in and moderate / edit group if you aren't available
4. Seed the group with useful info, keep info tab current, link to important documents and content
5. Make sure all questions are answered. Draw in the right people in via @ mentions.
6. Hold regular engagement events / proactive programming: Thursday Tip, monthly meeting, etc
7. Onboard and welcome new members
8. Ensure that members needs are met
9. More on this in the Guide to Groups

Check out this great example from Success Community:

<http://www.slideshare.net/Salesforce/salesforce-success-community-group-best-practices>



Members
[Show All \(11\)](#)

CIRRUS


CUSTOMERS


[Add/Remove Members](#)
[Invite People](#)
[Change Roles](#)

Group Files
[Show All \(2\)](#)

 [Green Dot Solar Panel...](#)
 [Solar Panel Overview](#)

Co-create Participation Guidelines Together

Having a strong set of guiding principles is key to any community. They provide guidance so that people aren't afraid to do the wrong thing. Engage your Founding Champions in the process!

Governance

- Official governance vetted by legal
 - Success Community Example: legally binding terms of use
<https://success.salesforce.com/terms>
- "Participation guidelines" co-created with champions – "guardrails" to uphold community goals
 - Success Community Example: non-legally binding guidelines
<https://success.salesforce.com/guidelines>
- Decide how you'll deliver it. Some ideas:
 - Part of onboarding for new users
 - Mandatory accept upon sign-on
 - Attach to a visible and accessible place in community
 - Example: one-stop-shop "best practices" group

Groups & Documents

- Which groups are public vs. private
- What goes where
- Official vs. unofficial

User Mmanagement

- Who gets in, vetting process
- Reasons to kick a user out
- Flagging protocols
- Whom to promote to Champion

Escalation

- What merits escalation
- To whom and how to escalate
- Role of champs & group owners

Top Tip: Have a bare bones governance plan in place, but use this opportunity to really flesh it out once you see your community in action.

Caveat: Have a Light Touch

Make structural and governance decisions, but don't overplan. Maintain a light touch - establish a strong direction, but avoid being top-down.

Use cases are a great place to “land and expand,” but don't limit your users – encourage them to create their own.

You won't know everything ahead of time; allow use cases to *emerge from actual use*



Grow Membership Virally Through Champions' Word Of Mouth

Your Champions should be inviting like-minded individuals to participate. Here is what worked for Success Community:

- Success Community Newsletter to drum up interest and excitement
- Internal customer-facing stakeholder “what’s in it for me” presentation
- Social media-ready posts and tweets for MVPs to spread
- Templatized documents for Champs to draw in new participants to their groups



Get Your House In Order

React

- What will you do when the customer needs something?

Example from Success Community:

- Build awareness with key stakeholder teams , so that they know how and when to respond
- Develop mutual accountability and SLAs for timely responses.

Escalate

- How will you escalate in times of need? To whom? What channels?

Example from Success Community:

- Define escalation process with IT, security & Dev teams
- Give community tools to be “eyes and ears” through open communication & moderation / flagging

Be Proactive

- Be “in the know” about company initiatives to communicate them externally

Example from Success Community:

- *“Being in Marketing, it is critical for me to be in the know – so that I am aware of all the key initiatives, and know what and when to filter out to the community.” – Erica Kuhl*

Engage Execs

- Build up to direct and meaningful engagement with leadership team.

Example from Success Community:

- Build and deliver scheduled dashboards for key execs covering important metrics.
- Present at internal meetings to demonstrate success and get further engagement and buy-in

Be the Change You Want to See

Your Founding Champions are super important to the community's ecosystem, because their online behavior informs behavior of incoming members and forms culture of the community. A solid community proactively keeps destructive behavior away.





Your Action Plan:

Identify external Founding Champions:

- Likeminded customers (or partners) whom you trust to build this community.
- Likeminded people who can get others to participate and represent the community.

Identify internal Founding champions:

- Your internal brain trust
- Varied across the organization, job functions and job levels

Design a plan to activate Champions:

- Share vision and align on roles and mutual expectations
- Validate the initial community plan and use cases - brainstorm and evolve the plan
- Create a private Champs group where they can swap best practices & support each other

Create rollout plan:

- What are the right groups?
- What's the right content?
- Who are the right people?
- What are the right business systems?

Create a plan for growth:

- Develop a plan for expansion – leveraging Champions' word of mouth and existing channels
- What success looks like – key KPIs, metrics, dashboards
- Participation guidelines and governance

4

GROW AND CAPTIVATE

Spread the word about the community! Recruit new members.
Demonstrate value and earn a return visit from existing members.



Make Community Part of Customer Journey

To make sure your community doesn't become a silo, make it relevant to your user's journey. Map out all existing touchpoint and connect the community to them. Examples:

Support:

- Support agents invite customers to problem-solve in community and link to solutions in community.

"We have dedicated support agents on the community discussion forums. " – Erica Kuhl

Sales:

- Sales reps position community as a competitive differentiator and offer it a value added service for customer toolkits.

"I presented the value of community to Sales Engineers. We made it easy to join Success Community and user groups as part of the sales process." – Erica Kuhl

Marketing and events:

- Across marketing assets, create multiple Calls to Action to join community.

"We highlight advocates in marketing campaigns and promote community in a customer newsletter" – Erica Kuhl

Customer success:

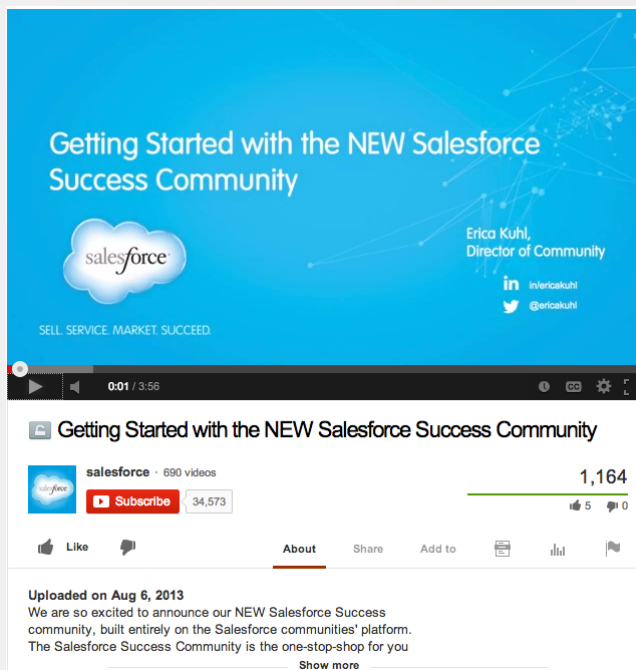
- Position community as a valuable channel to drive product engagement and adoption among existing clients.
- *"It's part of the CFL (Customers for Life) onboarding process, which is a major way to get education on new releases, tied into certification and training" – Erica Kuhl*

Now It's Time To Do The Marketing "Launch"! Connect It to Existing Marketing Programs and Assets

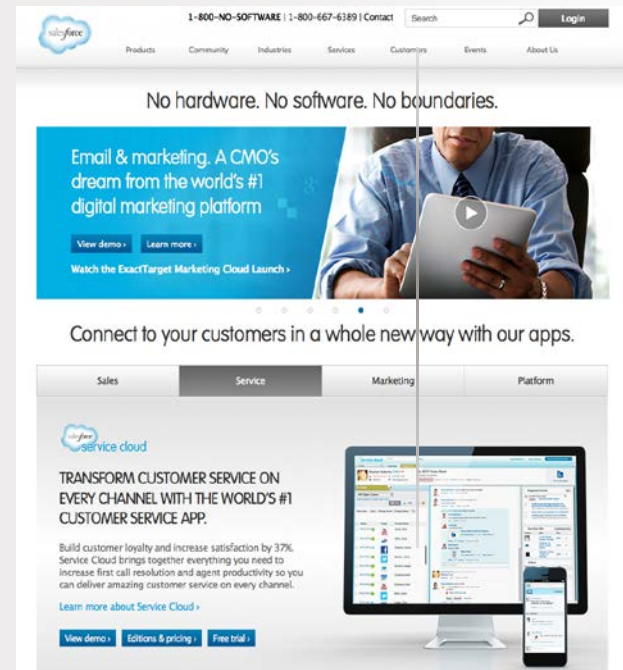
Marketing



Social Media



Featured On Website



Use Existing Events to Accelerate Use

The ability to convene in person is critical to engagement and a positive culture. While members interact online on a daily basis, events act as an accelerant to drive engagement and pull people in. It's like a shot of adrenaline for your community! Especially before your community develops its own cadence, connect to existing events to drive awareness, urgency and engagement.

Digital Events

- Digital summit / advisory board event
- Webinar / digital event
- Mixed formats: Webinar & Q&A community

Physical Events

- Discussion channel for existing events
- User conference

Community At Salesforce Events:

- Featured at Dreamforce and Cloudforce / Salesforce1 events
 - Slides with MVP pictures and a description of MVP Program
 - “Ask the Expert” booth staffed by MVPs
 - MVPs leading formal and informal sessions
 - User Group sign up booth
- MVP Summit



Your Action Plan:

- Enable external and internal champions to evangelize and invite new members
- Examine the customer journey and connect to community at every touchpoint
- Prepare for a marketing launch (but remember: do this only when there's enough critical mass, excitement and constructive work in the community)
- Tie to existing marketing initiatives
- Use existing events to increase awareness and give people an urgent reason to log on and participate



5

ENABLE

Help all members and stakeholders get the most out of the Community, and work together towards a shared vision



What Do All Users Care About?

Same thing everyone cares about..

Why and *How*:

- Why should I do this? What's in it for me?
- What do I do when I get there?
- What's considered appropriate? What if I make a mistake?
- How do I make it part of my day?
- What does it mean to my identity / reputation?



Everyone's listening to their favorite radio station: WIIFM (what's in it for me?)

Top Tip: *Don't assume that everyone understands @ mentions, #hashtags and other power user features. What may be basic to you, may not be basic to all*

There Are Many Groups To Cater To: Start With Your Members

Customers / partners



They are the participants you are creating the community for

Champions and Superusers



From among your external stakeholders -- they are the most engaged members driving the community

Team Leads, Managers, Execs



From inside your organization -- they are drumming the drum and getting other internal members to participate

Employees



These are internal employees who represent your company in the community

Partners



Partners who collaborate with you to service the end customers (if in the customer community)

Help Your Members Get the Most Out Of The Community

When new users join the community, they should walk away with an immediate and clear idea of its purpose, their role and ways to get involved. People want to do the right thing – they just don't always know what it is.

You should:

- Share vision – “why am I here?”
- Share best practices and etiquette (things to do)
- Share “how-to”s and getting started resources
- Be clear about participation guidelines (things to do and things to avoid)



Top Tip: don't underestimate the power of welcoming / onboarding. As part of your welcome packet, outline 3 specific things a new member can do.

Empower Champions and Supersers

**Customers /
Partners**



They are the participants you are creating the community for

**Champions and
Superusers**



From among your external stakeholders -- they are the most engaged members driving the community

**Team Leads,
Managers, Execs**



From inside your organization -- they are drumming the drum and getting other internal members to participate

Employees



These are internal employees who represent your company in the community

Partners



Partners who collaborate with you to service the end customers (if in the customer community)

How Do You Find Champions? How Do You Work With Them?

Founding Champions

- They are at the core of the community – a council that participates in major decisions.
- This is an aspirational group that other SuperUsers should work towards becoming. Give them some special privileges – figure out what's important to them.

Superusers

- These members are actively helping others, drumming up excitement, onboarding new users. They post actively and with purpose, respond to others' posts.
- Help them help other members. Help them own parts of community; give them deeper insights into community roadmap

Group Owners

- These members have stepped up to lead groups. They are mini community managers
- Help them by developing a guide to group ownership (check out Guide to Groups) and work with them in a "group owner" group



- ❖ Keep a dynamic list of most engaged and useful contributors and new group owners. Resource them properly – really invest your time in these groups, so they can invest in others. Create a regular cadence of events just for them.

How Salesforce Enables Customer And Partner Champions

Salesforce MVP program recognizes exceptional individuals within the Salesforce community for their leadership, knowledge, and ongoing contributions. These individuals represent the spirit of the community and what it is all about!

- Accessibility
- Expertise
- Responsiveness
- Leadership
- Advocacy

Check it out : <http://www.salesforce.com/mvp>

Salesforce User Groups are led by leaders from the community at a grassroots level – bringing together people to be successful with Salesforce products, with a vertical and / or geographical focus. Check it out:

<https://success.salesforce.com/userGroups>



"I meet regularly with group owners in collaboration groups. I also meet with our extended community management team, comprised of internal and external stakeholders. We cross promote new groups and decentralize community management" – Erica Kuhl



How We Enable Internal Champions



“Our internal champs leverage the community in different ways to significantly improve how they communicate and work with with customers. Use cases range across: release readiness, new customer onboarding, sales competitive differentiator, delivery of best practices and industry insights.”

- Erica Kuhl

Success - Getting Started

Post File Link Poll

Share with Success - Getting Started Share

Q | Show All Updates

Samanthia Achuff (salesforce.com)

Amazing resource to share!

🔗 [ButtonClick Admin revolution: 5 Pillars To Creating Self-Sufficient Users](http://buttonclickadmin.com/5-pillars-creating-self-sufficient-users/)
http://buttonclickadmin.com/5-pillars-creating-self-sufficient-users/

Comment · Like · Share · Today at 8:48 AM

Samanthia Achuff (salesforce.com)

@Success - Getting Started Premier (Private)
@Eanna Cunnane (Salesforce.com)

Like · Today at 8:49 AM

Write a comment...

Eanna Cunnane (Salesforce.com)

Roll on a new week of Getting Started with Salesforce, but before we go forward, let's take a look back on what we did last week:

- * In our continued look at roles and profiles, we covered org-wide defaults (OWDs): <http://bit.ly/1dHNbAD> and OWDs and the role hierarchy: <http://bit.ly/HwpobK>
- * @Elna Miller (salesforce.com) produced another indispensable edition of her Goodie List: ... [More](#)

Comment · Like · Share · Today at 7:15 AM

Eanna Cunnane (Salesforce.com)

Here's the last in our introductory pieces on roles and profiles before we start doing some deeper dives on the topic next week. MVP @Shell Black (Customer) runs a great Salesforce-focused blog at <http://www.shellblack.com/blog/>, and he's created some great youtube videos with real-world examples of Salesforce solutions. Check out the one below for a clear, practical intro to Salesforce security, and if you're ... [More](#)

Salesforce Security - OWDs & The Role Hierarchy
[HTTP://WWW.YOUTUBE.COM/](http://www.youtube.com/)

In this episode of the ShellBlack Whiteboard, Shell introduces the major areas in "setup" that impact record access - Record Ownership, the Role Hiera...

Links to Get You Started!

Important Recent Posts

- Getting Started Page
- Getting Started Implementation Guide
- Getting Started Workbook
- SMB Website with Resources

What's NEW!

- Strategies to Accelerate Your Salesforce Adoption

Moderation Team

Success - Release Readiness Chatter Group

Join a Local User Group!

Description

Salesforce's Customers for Life is here to help you be successful and get you up and running quickly. This group is designed for new customers to engage by asking questions, giving feedback, and sharing experiences.

We'll provide resources such as:

- Best practice guides
- Helpful 'how to' videos
- Tip Sheets/Documentation on functionality

Topics we'll discuss include:

- Adoption

Work With Leadership To Create Needed Infrastructure

**Customers /
Partners**



They are the participants you are creating the community for

**Champions and
Superusers**



From among your external stakeholders -- they are the most engaged members driving the community

**Team Leads,
Managers, Execs**



From inside your organization -- they are drumming the drum and getting other internal members to participate

Employees



These are internal employees who represent your company in the community

Partners



Partners who collaborate with you to service the end customers (if in the customer community)

Nurture Executive Sponsorship and Engagement

Ideal Exec Sponsor

- C-Level or SVP
- Customer facing role
- Believes in community
- Understands how to engage, possesses “community etiquette”

Benefit of Having One

- Legitimizes; increases visibility
- Builds culture of openness
- Leadership and social proof for other execs
- Communicates value to other execs & gets them onboard

Benefit To Them & Company

- Increase relevance
- Get credit for introduction
- Increase innovation
- Find and retain customers
- Transform how company works with customers

How To Help Them

- Private space to practice before openly posting to community
- Start small; just a few minutes a day
- Reverse mentoring
- Schedule time to post into a day
- Praise and measure the right things

Set Expectations

- Social is different
- Honesty, humility and speed trump everything
- No ghost writing
- Be human; use simple language
- Comfort w/unstructured & ambiguity. Experiment!
- Community doesn't pay off overnight

Focus On The Visionaries

	The Visionary	The Reluctant	The Social Critic
Their Vision	This is transformational	This is important to us, but I don't get it	Social is a fad. Why would our customers want to talk to each other?
Level of commitment	I want to support & participate	I'll support but I don't want to engage	I don't want to support or engage
Possible pushbacks	May need to pull back participation	Don't communities run themselves?	Reluctance to open communication, time waster
How to work with them	Get involved early, involve them in the vision, share plan, secure participation	Start small, prove success, share larger vision later, make a case for community management	Work with other execs first, educate on proven successes
When to work with them	From the beginning	After early results	Brief them on success after rollout
Enablement necessary	How to's, align on measurement	How to's, how it's relevant to meeting their goals	The why, the how-to's, alignment to biz goals

- ❖ identify visionary execs to sponsor the Community. Share your plan with them. Don't burn effort on converting non-believers at this point – you'll do that later.



Engage Key Team Leads & (Middle) Managers

Team And Department Leads

- They lead customer facing teams
- Need to have their buy-in to serve the customer and build community into existing operations
- Having an exec on board can help influence this group
- Make sure you communicate in terms of their KPIs and how community can help them

Benefit To Them & Company

- Help them get their job done – better customer service, more sales, better marketing
- Get market insights faster
- Understand how users use your product

How To Help Them

- Help them find relevant use cases
- Help them develop an onboarding program for their teams
- Create a process to work together on an ongoing basis

Set Expectations

- Community is different
- Their job is to facilitate, not “own” relationships
- Engage, be a human; use simple language
- Comfort with unstructured & ambiguity
- Community is not campaign, not a 1-way broadcast

Empower Employees To Represent Your Company

Customers /
Partners



They are the participants you are creating the community for

Champions and
Superusers



From among your external stakeholders -- they are the most engaged members driving the community

Team Leads,
Managers, Execs



From inside your organization -- they are drumming the drum and getting other internal members to participate

Employees



These are internal employees who represent your company in the community

Partners



Partners who collaborate with you to service the end customers (if in the customer community)

Help Employees Be Effective Hosts For Community Members

80% of your marketing will be internal at first.

Here are some things to get started:

- Evangelize value and share best practices - customize by department
- Customize governance & education by department (what they can & can't say will differ)
- Build buzz – share assets in internal network
- Webinars / brown bags
- Physical assets in office: wall clings / table tents, etc.
- Join existing team meetings / calls

Launch Plan

	Responsible	Date	Audience
1. SOCIAL			
2. Customer Prospect Webinar	Erica / Maria G / Maurs	6/27/2013	Customers
3. Positive engagement for webinar registrants	Anna / Nathan	6/24 - 6/27	Webinar registrants
4. Social engagement during Webinar	Anna / Nathan	6/27/2013	Webinar participants
5. Tweet Chat: Making your Community Strategic	Maria / Erica / Marketing Cloud	6/13/2013	Community Managers
6. Facebook Post - Connect in a whole new way	Anna / Erica	6/28/2013	Fans
7. Tweet from @Salesforce and @MarketingCloud	Erica / Anna / Tish	6/28/2013	Followers
8. Community Blog Feature	Erica / Nathan / Amanda W.	August	Blog subscribers
9. INTERNAL			
10. Teaser post about the launch	Erica / Michael P.	6/24 - 6/28	Chatter email from Solutions Marketing Team

Pre-launch buzz

All Updates | **This Update**

Erica Kuhl
5 days and counting until we re-launch the Salesforce Success Community on the Communities Platform. For a sneak peek prior to launch on 7/1 - check it out! If you are interested in a running a collaboration group on our community, please reach out and talk to me. It's the perfect opportunity to connect to OUR customers in a whole new way.

Salesforce Success Community Launch
Download ppt (6.9 MB) | More Actions

Customer deck for key stakeholders



Be Clear About Governance; Help Employees Do The Right Thing

Elements of Governance

- Official governance vetted by legal:
 - How does it fit into overall digital governance?
- Unofficial participation guidelines:
 - Guardrails to put customer first, deliver & uphold community & company vision
 - What TO DO vs. what not to do
 - Employees' role as "hosts"
- Think through delivery:
 - Prior to launching –mandatory program
 - Mandatory accept upon first sign-on
 - Post to a prominent internal hub for reference

Public vs Private

- Which groups are public vs. private
- What goes where
- What can and can't be shared publicly

Groups and Files

- Group & file governance and best practices
- External vs. internal
- Official vs. unofficial

User Management

- Provisioning
- Deprovisioning
- Flagging
- Automated vs. manual

Escalation


- What merits escalation
- To whom and how to escalate
- Role of champions & group owners

Internal Marketing And Education Never Stop


After Launch, Your Efforts Should Be 50% / 50% Internal / External


- How-to internal video – focus on employees’ role as hosts
- Launch day posts - Coordinate posts by all internal champions
- Continue enablement activities (brown bag lunches, webinars, joining existing meetings)
- Build into employee onboarding

Launch


 **Erica Kuhl** (originally posted by Amanda Nelson)

The new Salesforce Success Community is live and @Erica Kuhl has been hard at work. Read all about how using our own product enabled Salesforce Success Community to come to life.


 **How to Create a Successful Customer Community**
<http://blogs.salesforce.com/company/2013/07/salesforce-communities.html>

 **805,084 Members**
 Download png (60 KB) · More Actions ▾

“Chatter Assault Post” And Awareness Build


 **Erica Kuhl** (originally posted by Erica Kuhl)

Now that we've officially launched our new Salesforce Success Community on the Salesforce Communities platform (success.salesforce.com). It's time for YOU to start engaging and connecting with our customers. It's easy to get started - just login with your Salesforce SSO credentials, complete your profile, tour the new community and start interacting! Watch this 3 minute video on how to get started. ... [More](#)

 **Getting Started with the NEW Salesforce Success Community**
<http://www.youtube.com/>
 We are so excited to announce our NEW Salesforce Success community, built entirely on the Salesforce communities' platform. The Salesforce Success Com...

Comment · Like · Share · July 2, 2013 at 10:43 AM

Momentum Building

 **Erica Kuhl** (originally posted by Erica Kuhl)

We just created 800,000 Salesforce Success Community members! Since we launched on 7/1 we have seen over 57% new member growth. Keep that momentum going and drive all your customers to discover the goodness of the NEW Success Community at success.salesforce.com.

cc: @Michael Peachey @Kendall Collins @Fergus Griffin

 **805,084 Members**
 Download png (60 KB) · More Actions ▾

Keep the Conversation Going in an Internal Chatter Group

Doing one training session is not enough.
Keep the conversation going!

Top Tips:

- Create “Customer community best practices” Chatter group to align everyone
- Involve internal champions in educating members
- Be proactive and post unique & useful info. Make it a destination!

The screenshot shows a Salesforce Chatter group page for 'Salesforce Community Group Owners'. The group is private and has a cover image featuring the Salesforce logo and the text '1 Community delight · showcase · engage'. The page includes a sidebar with 'Group Settings', 'Email Every Post', 'Information' (with links to Terms of Use, Community Guidelines, Group Best Practices, New Group Template, and Adding Official Logo), 'Description' (stating the group is for success of Salesforce Community Group owners), and 'Key Resources' (listing Erica Kuhl and Ryan Ellis). The main content area shows a post by Erica Kuhl dated October 9, 2013, at 8:27 AM, discussing the upcoming 900,000 Success Community members and asking for ideas for a celebration banner. Below this, there are comments from Adam Doti and Gillian Madill, and another post by Erica Kuhl dated October 9, 2013, at 1:35 PM, mentioning new member logins. A third post by Eanna Cunnane dated October 11, 2013, at 7:38 AM, mentions a meeting with Michael Sanajko. The page also shows a 'Share with Salesforce Community Group Owners' button and a 'Show All Updates' link.

Partners Are Your Collaborators To Serve Your Customers

**Customers /
Partners**



They are the participants you are creating the community for

**Champions and
Superusers**



From among your external stakeholders -- they are the most engaged members driving the community

**Team Leads,
Managers, Execs**



From inside your organization -- they are drumming the drum and getting other internal members to participate

Employees



These are internal employees who represent your company in the community

Partners



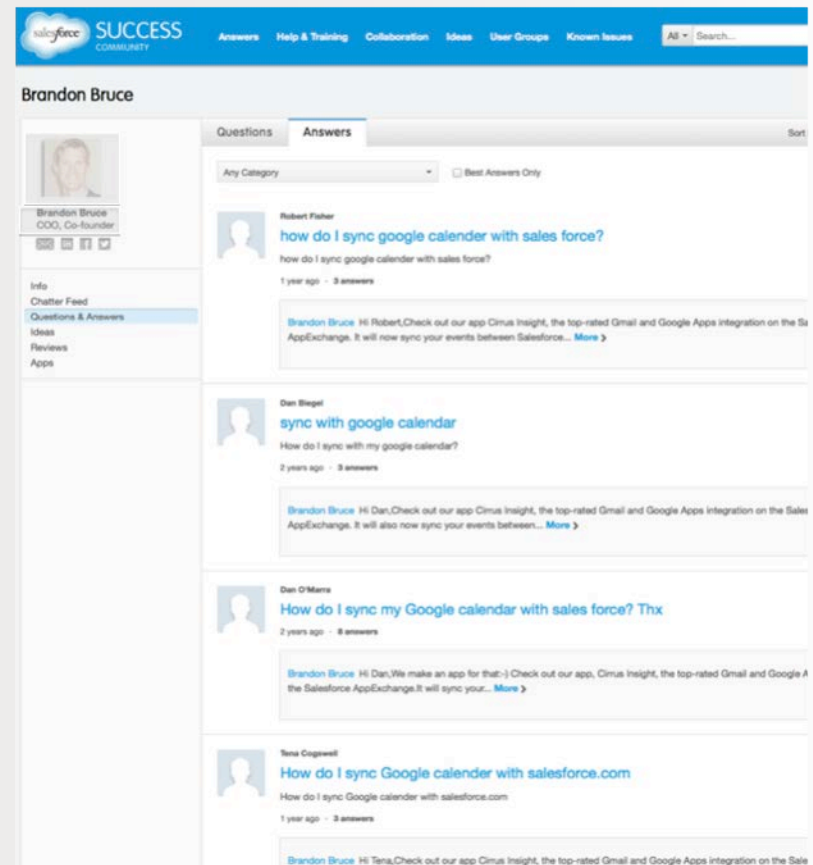
Partners who collaborate with you to service the end customers (if in the customer community)

Involve Partners In Community

Partner participation in the Success Community

- Partners are critical to the community. If they participate authentically, without soliciting, they gain the respect of community and earn business.
- Partners host and sponsor user groups.
- Many partners are MVPs actively contributing to the community.
- Guidelines created specifically for partners' participation.
- Actively reach out to partners that are not following code of conduct.

Example of “Partner Spam”



Your Action Plan:

Examine groups of people you'll need to enable – internally and externally:

- For each group, create a clear communication plan, addressing:
 - What's in it for them
 - Their proposed role
 - Participation guidelines - what to do and not to do
 - How to get started and get the most out of their experience
- Figure out how to communicate this – and make sure to make it an ongoing process



Let's Collaborate: Join Us In Success Community – Our Customer Community

Join us in the Salesforce Success Community

- Community Management Group
[\[http://bit.ly/cmtysuccess\]](http://bit.ly/cmtysuccess)
- Official Product Group
[\[http://bit.ly/CmtyOfficial\]](http://bit.ly/CmtyOfficial)

Help us write this playbook!

- Post your stories, quotes and screenshots to the Community Management Group to be included in the next revision
[\[http://bit.ly/cmtysuccess\]](http://bit.ly/cmtysuccess)



Thank You!

For more information, check out the follow-up

Engagement Playbook: <http://bit.ly/CommunitiesEngage>

Credits:

Maria Ogneva, Director of Adoption Marketing, Salesforce

Erica Kuhl, Director of Community, Salesforce

Bay Creative

