

Engaging Your Customer (or Partner) Community

Building advocacy and
trust based relationships
through community



SELL. SERVICE. MARKET. SUCCEED.

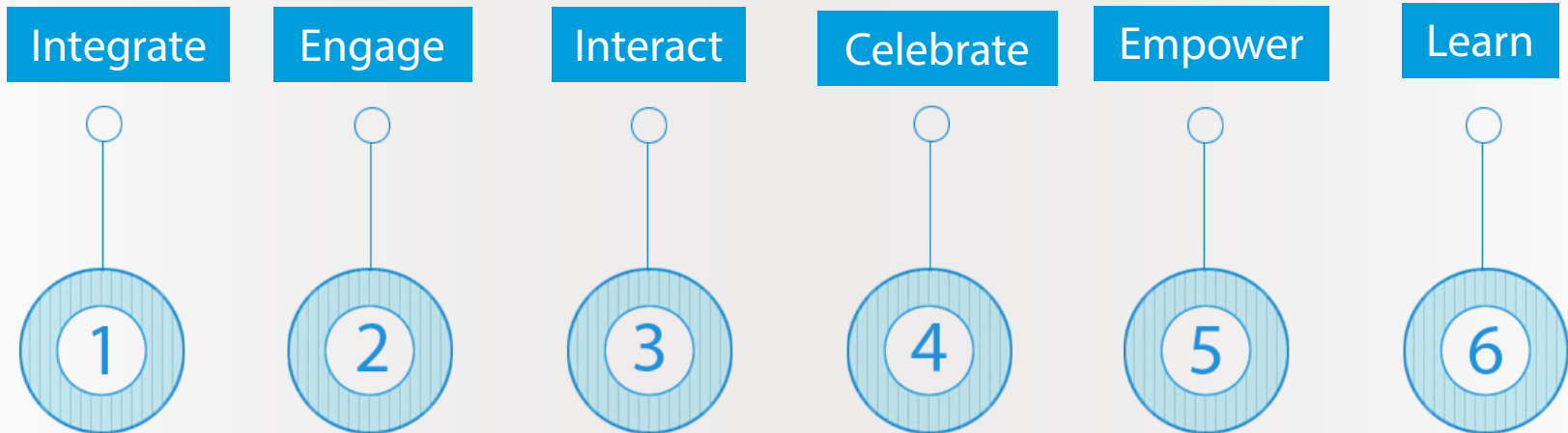


We Created This Playbook To Help You Engage Your Community Daily

This short Playbook is for those of you who have rolled out your community for external stakeholders (hopefully you read our guide at <http://bit.ly/CommunitiesAdopt>) and are ready to take engagement to the next level.

What you'll get out of this Playbook... You'll learn how to encourage collaborative participation from all members, provide a unique and valuable experiences and enable key stakeholder groups.

To make it easier, we've broken down the whole process into six main phases or steps:



During the rest of this book we'll follow these steps as we learn how to take engagement to the next level.

1

INTEGRATE: FOCUS ON ENTIRE USER EXPERIENCE

Focus on user experience and how Community fits into the broader journey of your customers and partners.



Understand Where Your Members Come From: What Else Is Part Of Their Journey?

Understand customer journey and at what point they enter the community

- From where are your members coming?
- Which internal stakeholders and assets provide touchpoints along the way?

Decide how you will vet future members. This should be consistent with your community's goals

- A vetted community will have higher engagement, but smaller in size
 - Clarify who can invite whom and what the vetting criteria are
- An open community will have more members but lower average engagement (per member)



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

2

ENGAGE: HELP MEMBERS PARTICIPATE AT THEIR OWN LEVEL

You got people into the community – now what? Build engagement programs to inspire and sustain purposeful participation from across the community.



Onboard New Users: You Only Get One Chance to Make a First Impression

The user's first experience is key to their future engagement. Your job is to help them understand the vision and purpose of the community, how they can contribute and get them started. Encourage members referring new members to onboard them – we are all responsible for people we bring to the party. Just as important is the first interaction. Make sure you're set up to respond to new members quickly.

Assets to create:

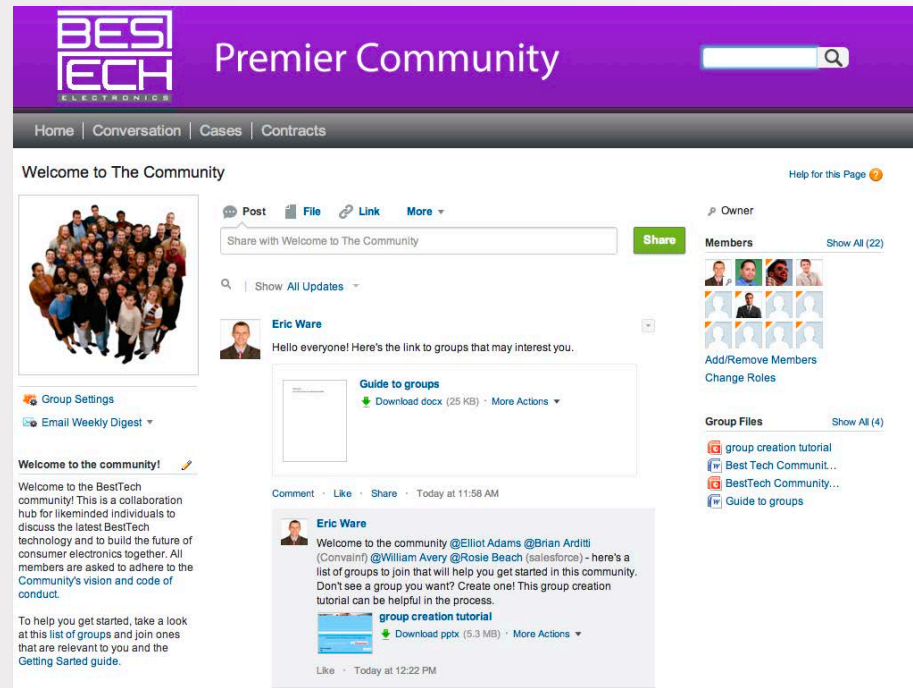
- Onboarding email
- Getting Started / Best practices public group
- Getting started package in group
- 30-60-90 day plan

What's in the getting started package

- Vision, expectations
- List of suggested groups
- Code of conduct
- Getting started guide
- 5 activities to start with

What's A Welcome Wagon?

- Identify new members weekly / daily
- Welcome them privately - Reduce newcomer anxiety
- Get to know them so you can connect them better
- Publicly connect to relevant people, groups and content-Use your “welcome wagon”



❖ Recruit Champions and SuperUsers to the “Welcome Wagon” -connect them with new members based on expertise and interests.

Ease Anxiety Through Private Channels

Sometimes new members feel shy and don't participate -- not because they don't have anything to add – rather, they aren't sure what to post and where.

Private communication helps de-risk that first interaction.

Private Groups

- Deep collaboration increases trust
- Truer and more varied things are shared
- Creates comfort zone, eventually encouraging public posting

Private Messages / Emails

- Great for onboarding
- Get to know people, build trust
- Draw lurkers out
- Send interesting posts for members to comment / answer



Understand Your Members' Participation and How it Evolves

Not everyone participates the same way – and that's OK – and oftentimes people go back and forth from passive reading to active engagement. Make sure you know where on the continuum each member falls.

- 1. Readers:** A nicer way of saying “lurkers.” While sitting on the sidelines, they may still be benefitting.
- 2. Active Readers:** Like readers, they haven't yet participated, but are actively learning and using what they learned.
- 3. Curators and Commenters:** actively engaged with content by commenting and sharing. Not producing original content.
- 4. Content Creators:** Hard at work creating artifacts for your community. Lifeblood of your innovation.
- 5. Group Owners and SuperUsers:** Cream of the crop, these guys lead the community, developing and encouraging others
- 6. Founding Champions:** You should know these guys well by now! **They are building the community with you.**



Draw People In With Engaging Events And Programming



Purpose of an engagement event:

- Event designed to drive short term engagement:
- Help pull in people who haven't participated
- Helps develop leadership of Champions
- Raise awareness
- Create A-ha moments

Examples:

Events:

- Webinar on industry best practices
- Live townhall w/an exec or a person of interest to community
- Contests
- "Chatterize" existing events

Programming / content:

- Wednesday Welcomes, Thursday Tips, Friday Fun

Top Tips:

- *Engagement events aren't substitutes for daily commitment to engagement. You need both!*
- *Conduct events at a regular cadence: if community comes to expect it, engagement will increase*
- *Don't try to run all the events: give your Champions an opportunity to own them*
- *Make it meaningful, but be careful to keep barrier to participation low.*
- *Blend online and offline: online builds loose ties, offline builds trust*

Involve Community In Planning And Execution Of Events

BESTTECH ELECTRONICS Premier Community

Home | Chatter | Cases | Contracts

Member Webinars and Events

UPCOMING EVENTS

Group Settings | Email Weekly Digest

Why lead an event?
Leading an event in the BestTech community is a great way to show off your expertise, meet other members, and expand your network.
Check out this [event calendar](#) to see what we've got going on – and sign up for a day to lead a webinar.
A member of the BestTech community team will be there with you to take care of all the logistics.

Description
It's important for us to convene from time to time – digitally and in person. We'll be having monthly events for the entire community to participate in. We'll be using this as a collaboration space for people involved in the event, as well as a backchannel for discussion before, during and after.
Do you have an idea for a webinar you want to lead? Let us know!

Post | File | Link | More

Share with Member Webinars and Events

Eric Ware
Here's the event calendar for 2013 and 2013!

event calendar
Download docx (27 KB) | More Actions

Comment · Like · Share · Today at 6:00 PM

Show All 5 Comments

Tori Manning (Manning Advertising)
@Eric Ware - December 6th sounds great! Can you help me with the content?
Like · Today at 6:07 PM

Eric Ware
@Tori Manning (Manning Advertising) - absolutely! Even better, once you have an outline or a draft, post them here, and the whole community can help!
Like · Today at 6:07 PM

Tori Manning (Manning Advertising)
Sounds like a plan @Eric Ware!
Like · Today at 6:08 PM

Write a comment...

Owner

Members Show All (21)

Group Files Show All (1)
event calendar

3

INTERACT: MASTER THE ART OF CONVERSATION

Like shots of adrenaline, engagement events and programming supercharge your Community. But it's not enough. What happens on a daily basis is just as important – interactions need daily investment of time and effort.



Energize and Engage People. Do it Daily.

Promote Storytelling

- Make it easy to share
- Start conversations at first
- Then get Champions to start conversations
- Make it easy to share
- Highlight and reshare your community's best stuff

Strive for Balance

- Questions vs. answers vs. statements vs. info posts
- Big picture vs. tactical
- Work narration vs. results
- Business talk vs. friendly banter
- Public vs. private

Get Out Of The Way

- Be responsive but don't dominate
- Make it about them
- Connect people in public and private
- Don't rush in to answer all questions – draw the right people in to do that

Get Conversations Started

Facilitate conversations – don't dominate them! Promote storytelling by asking really good questions. Help provide that push when things are quiet down.

- At first you'll start conversations. Ask specific questions – “tell me a story” is not specific enough.
- Over time, encourage your Champions to take on those roles
- Challenge to take conversations out of private groups and email chains, when appropriate
- Connect people to the right information and ask to answer questions – sometimes, you may need to take it to another channel
- Make sure there's always current and thought provoking content that aligns to vision of community

Premier Commu

Cases | Contracts

Your Startup

All Updates > This Update



Michelle Elise (ForceMind)

Hi everyone! When you started a start-up, which you leverage?

Comment · Like · Share · July 16, 2013 at 4:01 PM

Frank Manning likes this.



Frank Manning

I think creating a solid Facebook page don't forget - even your website should to engage with customers directly on your a blog or community.

Like · July 16, 2013 at 4:01 PM



Nina Walten (Mary's shop)

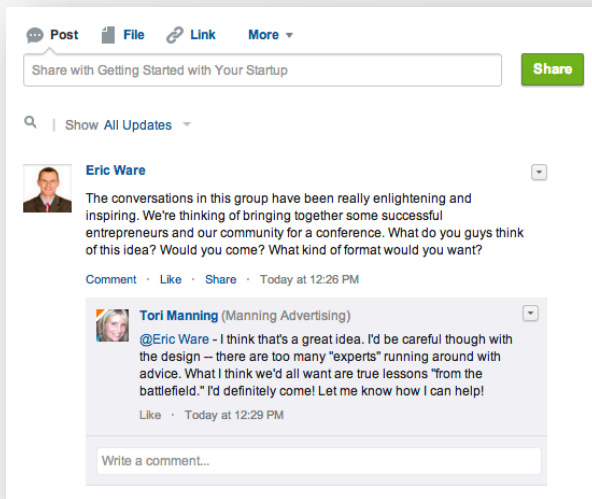
I have to ask - not only which channels you start?

Like · July 16, 2013 at 4:01 PM

Collaborate and Share Work (and Thoughts) In Progress

Sharing **work and thoughts in progress** – before it's done -- makes your work better, while giving community a sense of ownership, increasing engagement.

- Brainstorm ideas, share thoughts
- Post an unfinished draft for feedback
- Check out what others are doing
- Close the loop with results



Don't Suppress Social Banter

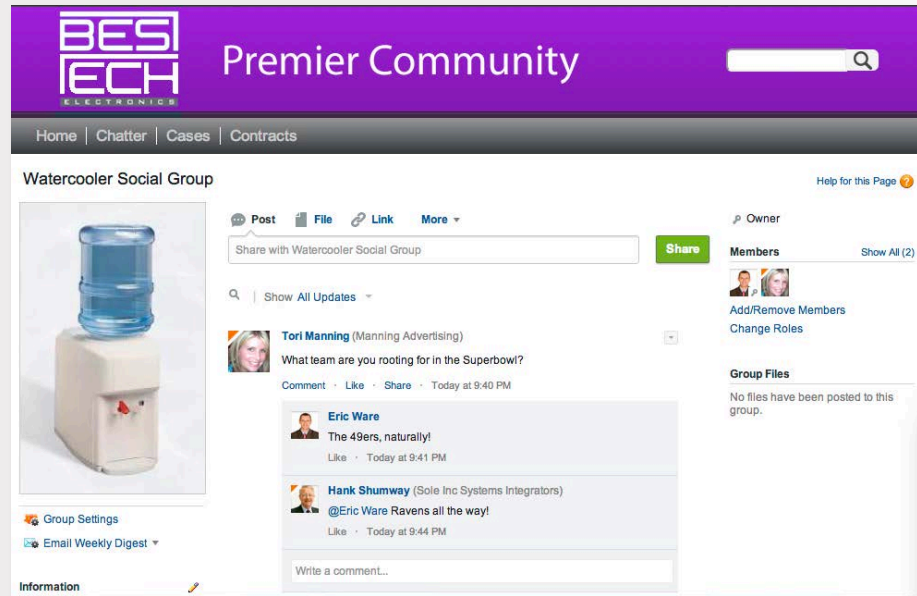
Even in business communities, social banter is good. Not only is it good – it's a must! Humans are social creatures, and healthy social communication is evidence of community's health.

Social Banter Is Healthy:

- It builds relationships, which build trust
- Trust aids knowledge transfer and deep collaboration
- People are social creatures
- Lines between personal and professional digital lives are blurring

But Should Still Be Focused On Business:

- Encourage social banter to occur in groups
- Help direct conversations there
- Designate group leaders
- Ensure that they adhere to standards of your code of conduct



Top Tip: have an ice breaker activity every once in a while – invite people to share something personal, photos, videos, etc.

Deal with Negativity Quickly and Effectively

Communities are messy because they are made up of humans. The best cure for negativity is proactively creating the conditions where it's less likely to happen. But when it does, be ready..

Do:

- Reach out in private and really listen
- What's the cause: habitual trolling vs. legitimate complaint
- Try to resolve; involve the right people / SMEs
- Acknowledge right away, but take time for right solution
- Close feedback loop privately and publicly
- If necessary, get execs involved and ask to engage
- Treat root cause; don't bandaid it
- Consider it an opportunity to learn and improve

Don't:

- Get defensive
- Take it personally
- Engage without listening

Be Proactive:

- Best way is to be proactive & treat problems
- Have an escalation plan; Enable your Champs to flag to you
- If someone is habitually affecting community health, take necessary action



Caveat: Have a Light Touch

You want to make sure conversations don't run off track, but don't be too top-down in dictating what goes where and what's appropriate and what isn't. Focus on your culture and giving your champions agency.



3

CELEBRATE: KEEP UP MOMENTUM AND RECRUIT NEW MEMBERS

Celebration is key to maintaining momentum. Observable wins and successes also make other people want to participate – so spread the word about great things people are doing in the Community. It also makes people feel good when their good deeds get noticed, encouraging them to do more of it. Shining the light on desired behaviors serves as a guide to participation guidelines.



Keep Drumming the Drum

Your community is humming along – but this is no time to rest on your laurels. Keep on drumming that drum and making sure everyone knows how awesome it is – internally and externally.

- Include “teasers” in email newsletters, social media, etc
- Drive people there from website & other touchpoints
- Create exclusive content, move key activities there – find a “hook”
- Evangelize internally. Don’t miss a single oppty to invite customer
- Use in person events
- Grow Champion network; encourage them to evangelize across their teams



Share Success; Celebrate Members

“Success” is a great motivator and is key to habit formation. It helps people believe that they can do it too. Encourage sharing things like the success of community, individual members’ success, and do it in stories and numbers. Amplify what users are sharing as it builds momentum, advocacy and goodwill.

Tips for Success

- Share in communications in community and other channels (emails, recaps in community, etc)
- Highlight *user of the month* in community and other channels
- Share with execs and managers
- Create quarterly success booklets capturing momentum and user stories



Gamification, Rewards, and Recognition

Keys to Success

- Be careful of cheap thrills
- Gamifying for sake of gamification leads to destructive behaviors
- Measure and incentivize the right behaviors
- Balance extrinsic with intrinsic motivators
- Remember: not everyone values the same things



Curate and Reuse; Codify Your Community's Knowledge

As members engage and share, look for ways to codify knowledge, make it accessible and reusable. Encourage people to search, reuse and update.

Encourage users to tag and develop tagging guidelines.



- Conversation, story, file, business object, customer record



- Reusable knowledge, artifacts



- Curate, tag, collate, categorize



- Make new stuff

0 people talking

Post File Link More ▾

Share something about Social Media Share

Description

Know something about this topic?
Add a description.

Sort By Most Recent Activity ▾

Getting Started with Your Startup (Archived) — Heather Brady

Hi everyone - just wanted to do a quick poll: Do you think social media has changed the environment and opportunities for today's business?

Nope, not at all.	0 (0%)
A little bit, but I'm not too eager to jump onto the bandwagon.	1 (20%)
Social has changed the game - we're in the same field as the big guys!	4 (80%)

5 votes · Refresh · Change vote

Topics: Social Media

Comment · Like · May 30, 2013 at 4:59 PM


Tori Manning (Manning Advertising)
Social has changed the game. It allows us little guys to play in the big leagues!
Like · May 30, 2013 at 5:01 PM

Michelle Elise (Whiteboard Design)
I know how important social media is... but I'm still nervous. Which is why I'm so excited to be a part of this community - all of my questions are quickly getting answered. What opportunity!
Like · May 30, 2013 at 5:02 PM

Write a comment...


Idea: Create A Regular Recap with Member & Company News!

The Salesforce Customers For Life team created this multi-page Goodie List to highlight most important news, resources and announcements. If a member has just 5 minutes to spend in the community – it provides a great place to start.

SUCCESS 

The Goodie List: *Lead the Transformation* October 2013

Winter '14 is live, Dreamforce is just around the corner, and the Success Community is in full swing! As the leaves are turning and we get ready for the holiday season, it is definitely a good time to think about what "transformation" means to you, and how *you* can drive it at your organization. Start here!



Dreamforce 2013 * Agenda Builder LIVE since 10/10

BizBash named Dreamforce the #3 Tech Event in the US, after TED and CES, and ahead of Apple's WWDC, E3, Google I/O, and TechCrunch Disrupt.

- [Dreamforce LIVE](#) Webcast Series
- [Dreamforce PARTY Calendar](#) (by Apttus)
- [Salesforce \\$1 Million Hackathon—Largest Single Hackathon Prize Ever!](#)
- [The Girly Geeks: Women In Technology at Dreamforce](#)
- [4 Reasons Sales and Customer Service Managers Will Love Dreamforce](#)
- Meet SteveMo: [The Power of the Salesforce Community - Users Helping Users](#)
- Have a VIP experience with the [Dreamforce Leadership Pass](#)

November 18-21, 2013

5

EMPOWER: DECENTRALIZE AND GIVE AGENCY TO MEMBERS

The community manager answering to every post doesn't scale – and it's inauthentic. Increase engagement and reduce stress by giving your Champions agency.



Decentralize and Empower Champions

The most important job for you as a community manager is to develop leaders from your champions.

Decentralize Leadership to Effectively Empower Champions

- Scales infinitely and globally
- Doesn't depend on any one person
- Users own the community
- Users are empowered to act



Top Tip: continue to recruit Champions from across the community: vary by job function, department, expertise and geography. Continue to work with them in a private group.

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.


To Do

Develop A Brief Guide To Help Group Owners. Like This..


1. Be clear about purpose: which use case it supports, what's the goal? Who is it for?
2. Search for possible duplicate group – if exists, join forces
3. Seed the group with useful info, keep info tab current
4. Stoke the fires of conversations. Draw people in via @ mentions. Make sure to draw in execs as needed
5. Design regular engagement events / programming: Thursday Tip, monthly meeting, etc
6. Onboard and welcome new members
7. Ensure that members needs are met and questions are answered
8. More on this in the [Guide to Groups](#)

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](#)

Empower Ordinary Users Too

While you can probably respond to each post (especially when the community is small) – doesn't mean you should.

- Unless it's a product question / support issue, it's more authentic when an answer comes from another user or an (internal or external) subject matter expert.
- Maintain an active channel of communication so that you can reach out to these people. You may have to use other channels, if those users aren't active in the community – and that's OK.

“Never miss a good chance to shut up”
– Will Rogers



The screenshot shows a Facebook post by Michelle Elise (Whiteboard Design) asking for advice on social media channels for a start-up. The post has several comments from other users, including Frank Manning, Nina Walten, Eric Ware, and Tori Manning. The comments provide various pieces of advice, such as starting with a Facebook page, engaging directly on the website, and using social media feeds.

Michelle Elise (Whiteboard Design)
Hi everyone! When you started a start-up, which social media channels did you leverage?
Topics: Social Media Channels, Social Media
Comment · Like · Share · May 30, 2013 at 4:51 PM

Frank Manning likes this.

Nina Walten (Pacific Partners)
I have to ask - not only which channels to leverage, but where do you start?
Like · May 30, 2013 at 4:52 PM

Frank Manning
I think creating a solid Facebook page is a great place to start. But, don't forget - even your website should be social. You might want to engage with customers directly on your website as well, through a blog or community.
Like · May 30, 2013 at 4:52 PM

Eric Ware
@Tori Manning (Manning Advertising) - you just did a fantastic integration of social into your website. Can you share with the group how you went about it?
Like · Today at 10:11 PM

Tori Manning (Manning Advertising)
Thanks @Eric Ware - I'd love to share what we did. We did some research to see where our customers were spending most of their time and doubled down on Twitter and Pinterest. We engage daily, create original content and integrate the feeds into our website. Even our blog comments are social!
Like · Today at 10:14 PM

Get Internal Champions to “Own” Community

While you as the community manager coordinate the entire community and make sure it’s healthy all around, various internal teams should “own” pieces of community and key business processes

Example:

- The product team should own the Ideas section, and support should own the ticketing section.

How to work with internal teams:

- Have an ongoing meeting to proactively address trends and future plans
- Collaborate openly in internal Chatter to increase mutual visibility

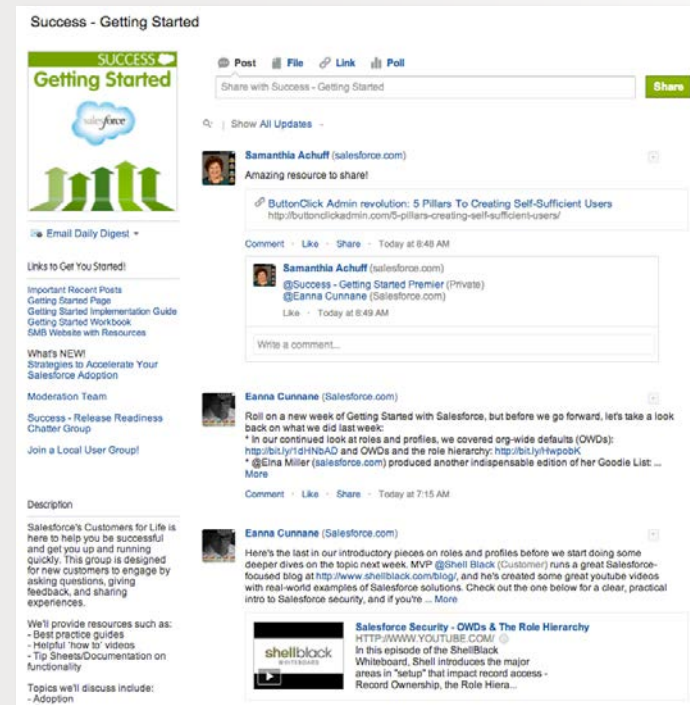
Don’t be too top-down – let them work it out and provide best practices



Continue the Conversation

- Create a “Best Practices” group in internal Chatter and external community to continue the conversation in public, and cut down the back and forth.
- Involve your internal Champions in the process of educating others
- Be proactive and post tips and tricks. Make it a destination!
- Be patient: behavior change doesn’t happen overnight
- Keep investing in Champions to enable their groups

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



6

Measure and Learn

Just because you can measure it, doesn't mean you should. Learn how to measure the right things, convert data to insights and create change with those insights.



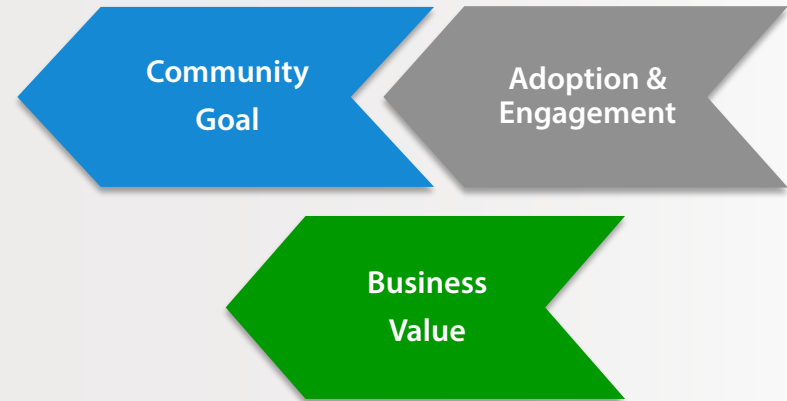
Engagement Leads to Business Value

What exactly is business value? Remember those use cases? Try to measure the community's impact with regards to these initial business goals.

Example:

- if the goal was to decrease the number of client contacts until resolution, focus on that metric.

But don't get too stuck on business value only. Without solid adoption and engagement numbers, members won't use it, and your value won't be met.



What to Measure

Engagement / Health

How deeply are people engaged?

Some things to consider

- Posts per active contributor
- Posts with comments vs. posts without comments
- #of comments per thread
- # of likes per thread
- Avg speed of response
- Private vs. public group posts
- Comments vs. thread starters
- Avg group membership
- Avg people followed
- Avg files uploaded
- # of contributors per post
- Posts by new members vs. posts by existing members

Adoption Metrics

How widespread is the use of the community?

Some things to consider

- Activated users as % of total users
- Contributors as % of total users
- Readers (lurkers) as % of activated users
- # of groups
- # of active groups as % all groups

Business Value

What's the value to my business?

Some things to consider

- Revisit your use cases
- Map business value derived back to the use case.

Example

- Use case = provide seamless support to end customers to increase renewals
- Value = renewal revenue tied to service satisfaction

What We Track In The Success Community

Website Metrics

- Page Views
- Visits
- Registered members

Activity Growth

- Posts
- Votes
- Comments
- Groups

ROI Metrics

- Case Deflection
- % MVP Contributions

Program Growth

- Increase Membership

Quality of Interaction

- Time Spent
- Return Visits
- Visitor #



Use Data to Formulate Actionable Insights

Data is good; insights are better. Make sure you:

1. Understand what healthy looks and feels like for your community.
2. Know what you're going to do about it
3. Know who's going to do it

In addition to capturing metrics and value, track so you can take action on a weekly basis:

- most active and helpful members
- members at risk of defecting
- trending content and groups
- groups at risk of being orphaned / inactive



Check Back in with Original Design

Are you still on track to meet your original goals?

- Are your use cases still working or do you need to redesign them?
- Is your community's infrastructure built to meet these goals and use cases?

Are your users still getting value?

- Have regular surveys for members to fill out. Share results back to the community. Have discussions 1:1 and in small groups. Uncover trends by listening to feedback in the community.
- Is the technology still working? How can you further build it into existing processes? Make sure the community is integrated with critical business processes – otherwise, it will be a silo with limited reach and business value.



Apply What You Learn

How will you feed things you learn back into the organization to create meaningful change?

This is where open dialogue and process with relevant teams is critical:

- Identify things that aren't working
- Convert data to insights
- Inform the right stakeholders with insights
- Agree on a plan
- Create a feedback loop back into the community with steps you're taking



Embrace Failure

- Embracing failure is key to becoming a learning organization
- It makes it “ok” to fail – helps unlock others to act and not be afraid to take action
- Sharing failures and what you learned from them helps increase trust, which increases ability to collaborate
- A culture that rewards smart risk taking is a culture that will do well with community building



Let's Collaborate

Join us in the Salesforce Success Community

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

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)



Appendix: Community Manager Checklists



Daily Community Management Checklist

- Check to make sure all posts are answered
- Connect to the right people
- Identify and ask execs to answer key issues
- Check in to make sure Champions haven't flagged anything
- Check for new joiners and welcome them
- Post a question, share news, praise / highlight someone



Weekly Community Management Checklist

- Check weekly metrics
 - Trending content and groups
 - Helpful and influential people
- Identify and welcome new joiners
 - Get the list to champs to welcome based on expertise
 - Welcome them privately or via email
- Track new groups being created, identify duplicates
 - Identify owners of duplicate groups and introduce them to each other
- Think through programming for next week
- Check with key internal groups to get updates and update them
- Curate and collect most important posts and success stories
 - Weekly recap
- Proactive outreach to members with low engagement
- Reach out and thank engaged members



Monthly Community Management Checklist

- Measure all metrics in engagement and adoption
- Explore any sudden changes
 - Groups at risk
 - People at risk
- Get a list of everyone who joined in the past 30 days and haven't contributed
- Share success with other members and internally
 - Anecdotes
 - Dashboard to members: good for some competition
 - Highlight top level engagement metrics and business value impact to execs
- Design monthly engagement event
- Check in with key internal groups for major updates; share yours



1+ Time Per Year

- Member survey
 - Understand how people feel about community
 - Attempt to capture value qualitatively and quantitatively
 - Close the loop on actions you took on previous survey's results
- Recap all happenings in a quarterly Success report
 - Highlight remarkable users stories, groups
 - Publish quantitative results: engagement metrics and business impact
 - Publish qualitative stories of how the community improved members' experience with company
- Distribute to all internal and external stakeholders



Thank You

Credits:

Maria Ogneva, Director of Adoption Marketing, Salesforce

Erica Kuhl, Director of Community, Salesforce

Bay Creative

