

# 5 STEPS TO COMMUNITIES THAT THRIVE

Harness the power  
of communities  
for your business

salesforce

SELL. SERVICE. MARKET. SUCCEED.





Engaged customers in  
communities spend 19% more.

– *University of Michigan*

Community is “a group of people with unique shared values, behaviors, and artifacts.”

– *The Community Roundtable*

# WHAT IF

## Your Customers Could:

Become your biggest public advocates

Share experiences & help others buy & use your products

Team up to address common issues

Consider your brand a valuable resource beyond transaction

Help you make better products by telling you what they need

## Your Partners Could:

Collaborate with your team to evolve best practices & become more productive

Identify & act on opportunities as soon as you receive them

Team up with your service reps to provide a great customer experience

Register deals & bring you more opportunities

Accelerate business by increasing visibility into your & your partners' business

## Your Vendors Could:

Get project updates in real-time

Anticipate the specific needs of your business

Accelerate projects by making every step more visible to all the right people

Coordinate every step of projects & campaigns in one place

Share records with you instantly, such as documents, invoices, & specifications

**COMMUNITIES CONNECT CUSTOMERS, PARTNERS, AND EMPLOYEES TO MAKE IT ALL HAPPEN FOR YOUR BUSINESS.**

Great. You're ready to build a community—but how?  
Here are 5 steps to create thriving communities.

- 1 MAP – Map Out Goals
- 2 INVEST – Invest In A Community Manager
- 3 BUILD – Build Community With Community
- 4 ENGAGE – Engage Hearts And Minds
- 5 MEASURE – Measure, Learn, Repeat

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# Map Out Goals

A successful community meets the needs of both your business and the community members.

Explore those needs, and see where they overlap. That's where your community should be.



First, define your business goals.  
Next, find out what your members want.

### Business goals:

- How will this community support your company's vision, mission, and brand promise?
- How can this community add to your core value proposition?
- How will this community complement and expand your customer experience?
- Does this community put customers at the heart of your business?

### Member needs:

- Who is this community for?
- What value does your product (and partnership with you) provide for them?
- How can you support/serve them?
- Why would they come?
- Why would they come back?
- What motivates them?
- Why would they participate?
- What else is competing for their attention?

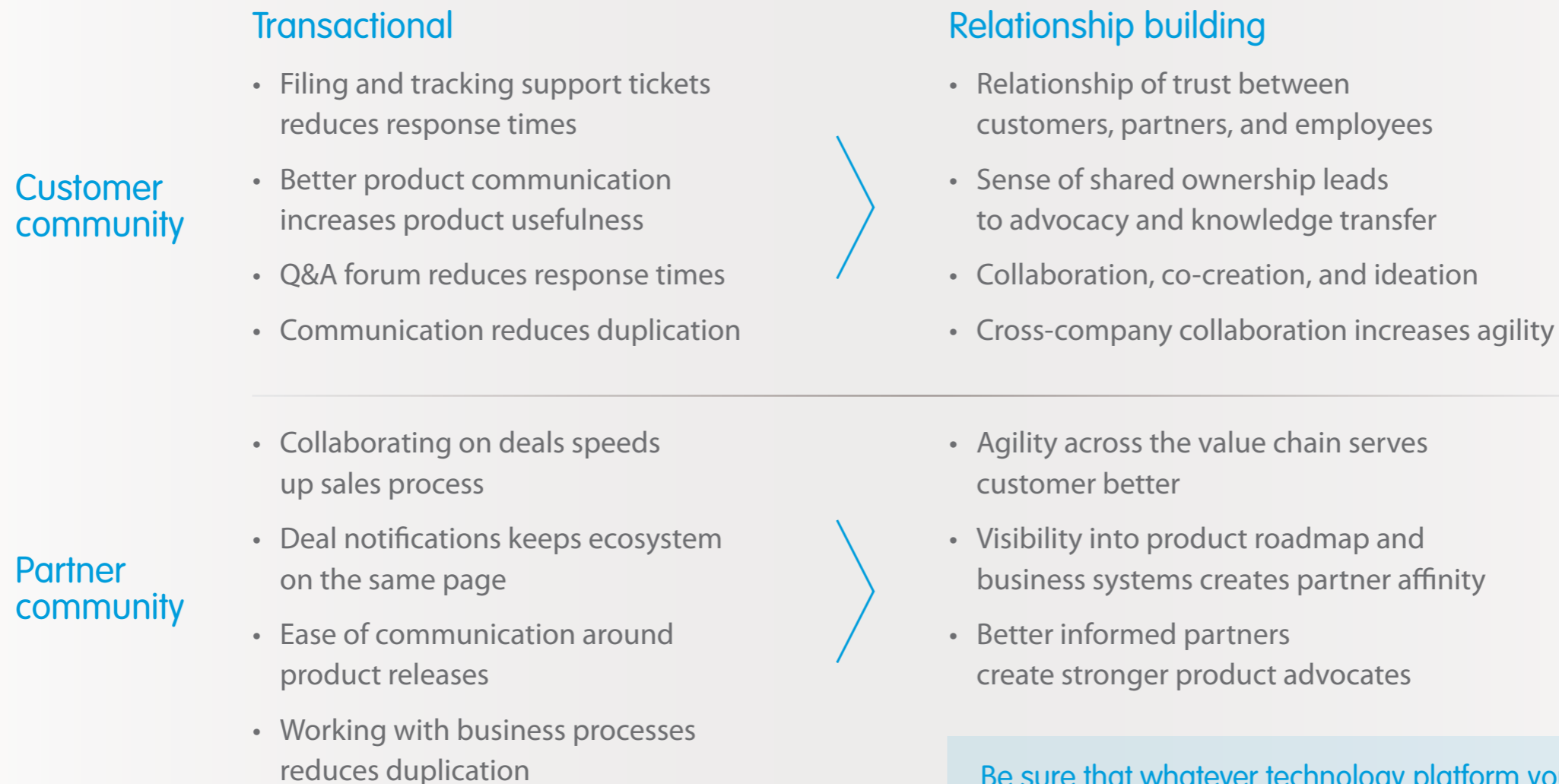
## What does the sweet spot between business goals and member needs look like?

Let's consider a household goods company that creates two communities to work with its retail partners and directly with consumers.



## Build relationships, not just transactions.

Community can make transactions more efficient (like filing support tickets). But a sustainable community goes beyond transactional use cases to build real relationships. Here's how:



Be sure that whatever technology platform you choose, it meets your business requirements, your members' needs, and is appropriate for your members' level of comfort with technology.



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## Invest in a Community Manager

You want your community to bring value to all members. You've set expectations internally about what a community is, and how working together openly is different from a 1-way broadcast. Now you're ready to move your community forward, and put customers at the heart of your business.



## Community is a cross-functional effort.

Don't make your community a silo. For success with external communities, you must communicate internally and work together, enabling access to and ongoing engagement with internal teams

(like product, support, marketing). Think through the complete customer experience and connect it with other member touchpoints.



## To guide all of these efforts, you need a *Community Manager*.

This position is essential, functioning as the connective tissue of your community. The community manager is your cross-functional leader who works inside and outside company lines to make sure the community stays active and brings value.

Active community managers stop the “What ifs” and turn them into opportunities.

### What if:

- Information leaks
- People complain
- Company loses control of conversation
- Company has to step in for every question

### Opportunity:

- Governance and employee training
- Address concerns and create public advocates
- Community manager promotes productive conversations
- Members can answer each others’ questions, which helps community scale



## Here are some basics about the Community Manager's role.

### What a community manager does:

- Sets strategy and measures impact
- Acts as the voice and advocate for the company and community
- Works cross-functionally to support community
- Enables shared purpose and ownership
- Connects people and creates the conditions for relationships to start and grow
- Builds engagement and sticky-ness
- Grooms advocates to lead
- Promotes productivity
- Limits destructive behavior
- Ensures that community meets business needs and member needs

### Who a Community Manager is:

- Passionate and able to ignite passion
- Superb communicator
- Empathetic and service-oriented
- Well-networked inside and outside
- Diplomatic and persuasive
- Approachable
- Honest, transparent
- Credible
- A strong decision maker

### What Community Management is not:

- Social media marketing
- Moderation and deletion of comments you don't like
- Broadcasting your messages without conversation
- Top-down structures
- Being part of every conversation
- Glossing over issues instead of fixing them
- Tech support
- Hard sale
- Eyeballs and views

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## Build Community With Community

Now that you've invested in community management, designed the community, and selected the technology, here's where the fun starts.

Start small with a core membership, gather support, build trust with the community, and start proving value. These behaviors will become the blueprint for what happens next.



## Start small, with big principles: trust and shared purpose.

Community is built on trust and shared purpose. Start with a small core group of like-minded champions who are your stakeholders: customers, partners, and employees. Ask them what they need, and build it with them. When your community gives people them more value than what they put into it, they will keep returning, and be active members.

### Shape your community norms:

- Encourage a culture of ownership by creating the community together
- Create a vision statement and community charter together with members
- Create a light group structure & encourage members to create their own groups
- Uphold community vision and live out best practices by example
- Learn to let go of control by empowering your community champions

## Focus, and allow for evolution.

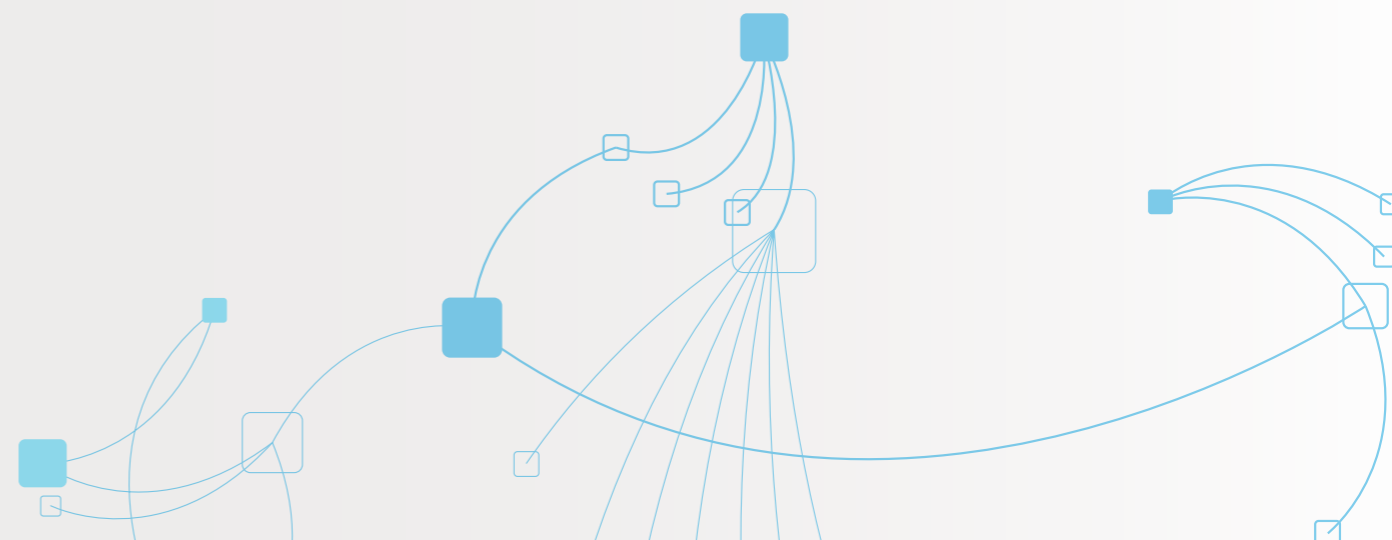
By staying tightly focused on your community and mutual business goals, you immediately help make your community more specific and useful for your company and your community members. This becomes a great platform to evolve from naturally.

### Focus on a few quick wins:

- Start with a few use cases that are easy wins; don't attempt too much at once
- Involve internal and external stakeholders to create momentum
- Prove business value by tying to business goals
- Show financial and non-financial impact; qualitative and quantitative

### Build for evolution:

- Remember to avoid over-design and allow unexpected uses to emerge
- Expect the community to evolve
- Encourage community members to build norms and structures as you guide them
- Remember, your initial use cases are just a starting place



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## Engage Hearts and Minds

Your community's active core group of customers, partners, and employees have been sharing, seeding great content, and building community together. Now it's time to gradually open the doors to a bigger population—or keep your community purposefully small, depending on your business goals.





## Once you build it, don't leave it.

So what does it look like when people start engaging? What is your role in this? Engage openly and honestly, and continue to reset expectations internally.

Your community manager will help build engagement by:

- Developing engagement programs to draw members in
- Promoting constructive conversation and limiting destructive behaviors; upholding the charter and vision
- Creating conditions for members to easily connect and create value for and with each other
- Building community activity into things members already do
- Recruiting and engaging employees, customers, and partners in the conversation
- Developing community champions and advocates
- Promoting storytelling and curating useful content for easy access
- Discussing industry trends and provoking deep thought

After the community gets going, share that success to gain even more momentum. Share with:

- Executives, to prove value and get more \$
- Employees, to gain participation and support
- Community, to gain engagement

## Define your company's role in the community.

The community manager helps define how your company participates in the community. All employees should understand their individual roles in the community, and follow best practices.

- This is a learning opportunity: listen actively and create meaningful change
- Respond honestly. Don't get defensive.
- Develop internal infrastructure to serve
- Be the party host, help people meet each other, and take a back seat whenever you can
- Route the right content to the right people
- Connect people publicly and privately
- Share company news and materials in appropriate groups. Don't spam everyone.
- Keep conversations constructive, uphold community guidelines, promote community health
- Be sensitive to members' needs instead of pushing your own agenda all the time. Find a balance.
- Be consistent; establish a cadence

## Prepare for growth.

When community grows, you can't hire fast enough—let your community members lead instead. Identify and nurture community champions; make it worth their while to lead. When members work together, community grows; when the company is the gatekeeper, it slows things down.

### Create the conditions that make it easy for people to connect and collaborate:

- By group for deep collaboration
- Across groups for serendipitous discovery
- Privately to build trust

# 5

## Measure, Learn, Repeat

There are many ways to measure the health of your community. Creating dashboards and a regular schedule of check-ins is just the beginning. Remember, what you measure should be defined by the goals you've identified at the onset of creating your community.



## Measure.

Since communities serve many different stakeholders, there are many different groups of goals to meet. For example, community member goals could be as simple as solving a service problem, while business goals aim to drive a better bottom line. These are related, but they are not always measured in the same way.

### Signs of health:

- High engagement
- High adoption
- Creative tension that drives constructive results without negativity
- Purposeful sharing with high-quality contributions
- Members get work done
- New members get started fast, with active contributors showing them the ropes
- Speed of response
- Breadth and depth of participation

### Some things that drive community health:

- Level of community management
- Depth of trust and relationships
- Shared purpose
- Culture of openness
- Clarity of vision, purpose, and expectations
- Balance of content and people


### Some things to track:

- Qualitative anecdotes and quantitative metrics
- High-level metrics for execs
- Engagement metrics for your community
- Calculate business value by tying community outcomes to the goals you set in step 1
- Identify trends, benchmark, and track over time

## Become a learning organization.

Don't miss the opportunity to get the most value from your community investment by becoming a learning organization. A learning organization takes signals from customers, partners, and employees, doubles up on what's working, and fixes what isn't.

Remember: feedback is a gift. Look for ways to improve your fundamentals. Don't gloss over tough problems with PR. Be open and honest, but take a position. And be sure to close the feedback loop.



Measure often, and consider quantitative and qualitative indicators. Understand what success looks like, and share it with the rest of the company.

Remember, relationships take time to build. And while the benefits aren't immediate, community-building has immense and long-lasting business value.

# Summary: Set the Right Expectations Internally

Today's consumers expect companies to behave—and communicate—like people.



## A COMMUNITY CAN GENERATE IMMENSE BUSINESS VALUE, BUT ONLY IF YOU ARE READY TO:

Communicate transparently, in real-time

Decentralize and empower employees on the front lines

Let go of control to ultimately increase loyalty, buy-in, and alignment of the entire ecosystem

Work transparently and collaboratively with your entire business ecosystem—employees, partners and customers

To succeed, you need internal support from executives and heads of business units, plus participation from employees. Sell the value by demonstrating momentum.

A community needs careful planning, attention, and nurturing to create the trust, shared ownership, and purpose necessary for a successful community.

Cultural change can be difficult, and not immediate, but it is well worth the success you'll reap. Becoming open and collaborative will transform your organization to be faster, more innovative, and adaptable in today's environment of constant change.

Articulate “what’s in it for me” across internal constituent groups to get participation

Work with heads of business units to build participation into their existing workflow

Tie to business processes

Become internally networked—establish access points, workflows, & escalation paths

Continue to set expectations and lead through action

Share successes with execs and teams—qualitatively and quantitatively

Demonstrate business value for execs by tying outcomes to goals you set

# THINGS TO REMEMBER

Today's world, powered by social platforms, has changed the way businesses are perceived and how they can operate, creating both risk and opportunity. Understanding and recognizing what's changed will help you with your community-building needs.

## BEFORE:

Your image was what you said you were  
You owned your brand  
Make a mistake? Hide behind PR

Broadcasting company statements were enough in times of crisis

Changing directions was seen as a weakness

Only MVPs gave you product feedback

Feedback from the suggestion box  
was implemented slowly, if at all

Innovation was R&D's job

## TODAY:

Your image is what customers think of you  
Customers & employees define your brand  
Make a mistake? Own it

Consumers expect a 2-way conversation

Becoming a learning organization is an asset

Anyone can give you product feedback

The market changes fast, so speed is your friend.  
You don't have the luxury of waiting

Innovation comes from anyone.  
Innovation is iterative.

**EMBRACE LEARNING, CHANGE,  
AND HUMILITY.**



# THINGS TO REMEMBER

BUILDING A COMMUNITY MEANS BEING  
COMFORTABLE SHIFTING CONTROL.

## BEFORE:

- Customers & partners were passive consumers of your information
- Customers & partners were kept at arm's length
- You were the only source of information
- You only spoke to customers in controlled & owned channels
- Conversations were one-way, structured, & occurred in a single channel

## TODAY:

- Customers & partners are active collaborators
- Customers & partners talk directly with you
- There are many other influencers & information sources
- Anyone can speak to your customers in any channel
- Conversations are unstructured, multi-channel, & multi-participant

This Community Maturity Model from Community Roundtable will help guide you:  
<http://www.communityroundtable.com/research/community-maturity-model/>

Communities Admin Guide will help you set up your community:  
[http://help.salesforce.com/help/doc/en/salesforce\\_communities\\_implementation.pdf](http://help.salesforce.com/help/doc/en/salesforce_communities_implementation.pdf)

Setting up your Salesforce Community (video):  
[http://www.salesforce.com/\\_app/video/chatter/help/Salesforce\\_Communities\\_Setup\\_video.jsp](http://www.salesforce.com/_app/video/chatter/help/Salesforce_Communities_Setup_video.jsp)

For trends in community management, check out State of Community Management Report 2012:  
<http://www.communityroundtable.com/research/the-state-of-community-management/>

# THINGS TO REMEMBER

## HOW MANY COMMUNITY MANAGERS DO YOU NEED?

There's no formula, but here are important questions to consider:

### MEMBER NEEDS:

- Who are your members? Is your community B2B or B2C?
- What are the different subsets of membership? Do you need to localize?
- How complex are their needs? How closely do members work together?

### COMMUNITY COMPOSITION:

- How large is your community? How many community champions do you have/need?
- Where in the community maturity cycle are you?
- How many communities do you have?
- How are you blending online & offline community efforts?

### YOUR BUSINESS NEEDS & USE CASES:

- What are your goals? What do you expect people to do?
- How complex is your organization internally?
- How much is each member (partner/customer) worth to you?
- Are there different jobs across engagement, content, strategy, and internal workflow?

## Here are important technology features to consider for your community.

- Functionality and UI
- Signup flow (gated, public, private)
- Integration into systems
- Connection to business processes
- Ability to scale and evolve

Thanks for reading.

And remember: building relationships builds great businesses.

To find out more about how Salesforce Communities can help you sell, service, and market like never before, visit: [salesforce.com/chatter/features/communities](https://salesforce.com/chatter/features/communities)

And don't just take our word for it. See how businesses like you are building communities, and work with other community strategists in the Salesforce community: [success.salesforce.com](https://success.salesforce.com)

