

The Online Community Playbook

Created by **TOPO** — Detailed playbooks for all things sales and marketing

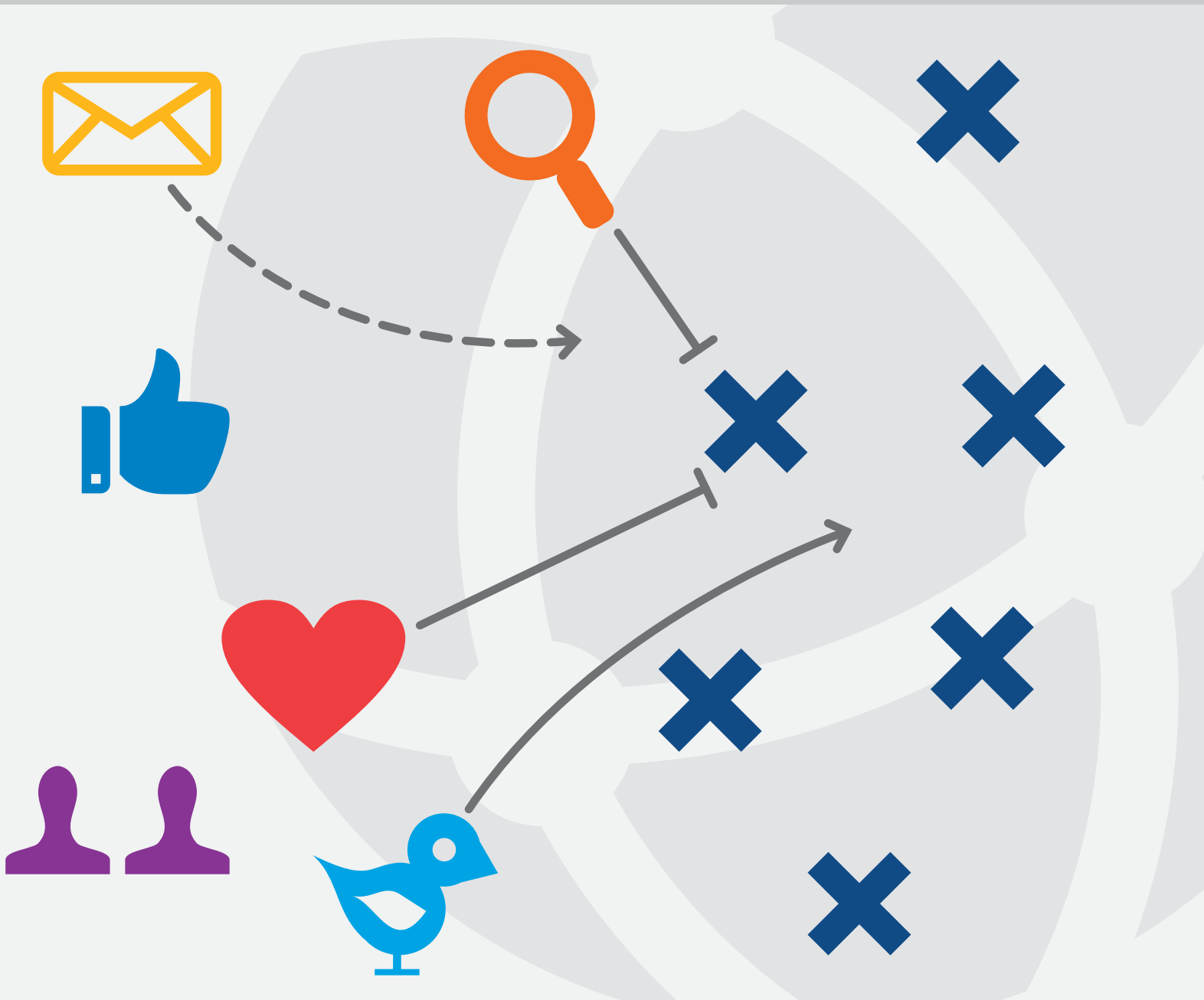


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Introduction

Why Build an Online Community

The way prospects and customers make decisions has fundamentally changed in recent years. The biggest change has occurred in the way they share and consume information online. The change is so profound that Forrester Research claims that people make over 500 billion impressions on each other about products and services every year.

In a nutshell, your customers want to connect with other customers when it comes to making a purchase or resolving a customer service issue. This shift raises an interesting question: how do companies participate in these conversations in a way that adds value?

Community power

The most powerful way a company can add value in this world is to provide a place where prospects, customers, and the company itself can interact. That's why online communities have quickly become one of the most powerful tools for allowing prospects, customers, and companies to engage with each other.

These communities typically focus on topics relevant to the company's target market, ranging from newsworthy issues to product-specific questions. It's a place where members can ask and answer questions, share valuable content, and interact socially.

The business benefits of community

The online community isn't just a place to facilitate interactions between your customers and prospects. Your community is a platform that can deliver material business results. As a general rule, prospects and customers that are engaged with you will buy more from you, be more satisfied, and remain customers longer.

Getting started

The good news is that it's never been easy to build an online community. Why? First, most of your customers, employees, partners, and prospects now expect to engage with you socially (thank you Facebook, Twitter, and LinkedIn!). Second, new technology such as SaaS is making it easier than ever to build and run an online community. Third, community management is now a mature field with well-established best practices.

It also turns out that there are specific steps you can take to start your community. And that's what the Online Community Playbook is about. The playbook focuses on the "how" of online communities and provides a detailed, actionable blueprint so that you can start your own community.

The Online Community Playbook

This playbook provides marketers and other customer-facing professionals with a blueprint to help them build and manage an online community. It's a detailed "how-to" guide that incorporates proven best practices, useful tools, and case studies.

What's inside the playbook

This playbook is divided into four sections, each of which contains useful best practices, case studies and tools to help you create and manage your own online community:

1. Online community essentials
2. Building and managing your community
3. Organization, technology, and metrics
4. How to get started

Who should use the playbook

Marketers, customer service professionals, and other customer-facing employees who want to engage prospects and customers in a meaningful, social manner should find the playbook particularly useful.

How to use the playbook

The Online Community Playbook focuses on how to build and manage an online community for your company. Think of the playbook as a roadmap to guide you through the process of planning, building, managing, and analyzing your own online community.

There are a number of tools and templates included in the playbook. Make sure you pay particular attention to them. They will help you design and build a better community and reduce the amount of work required to get your community up and running.

5 Online Community Essentials

1. Understand why people will use the community

The most successful online communities provide something that your prospects and customers want. Ask a handful of your current customers why they would participate in your community. You'll uncover different reasons that may range from connecting with other like-minded people to resolving product issues. Use this data to inform community design and the activities you promote in the community.

2. Build a community that will scale over time

You should design your community so that it will scale over time. While you may start with a few dozen members, successful communities have hundreds of thousands of members. Make sure that you use a community technology platform that scales and that your community management processes can scale to support a large membership.

3. Focus on recruiting and engaging community members

Members are the most important part of your community. The more time you spend recruiting and engaging members, the more successful your community will be. As such, the vast majority of the Community Manager's time should be spent on recruiting new members and engaging existing ones

4. Standardize how you manage the community

Building and managing an online community is relatively straightforward. There are now established best practices that you should use to manage the community. Make sure you standardize around a core set of best practices and activities. For example, try to invite a certain number of people to join every week and use a standard email invitation to do it.

TIP!

Adopt a core set of best practices so that community management is easy and painless.

5. Measure and optimize your online community

Measuring your online community is critical to determining whether it's having an impact on your business. You should track strategic metrics that show how the community is supporting key business objectives such as revenue growth, as well as operational metrics such as the number of members in the community.



Use Case: A Software Company's Executive Customer Community

This enterprise software company targeted a small number of Fortune 500 companies in the energy industry. The company's marketing team wanted to mobilize their existing customers to support two objectives:

1. Drive higher wallet share at current customers; and
2. Engage and close new customers.

To achieve these objectives, the company created a community focused on hot-button issues in the energy industry. The marketing team invited current customers to join the community and presented it as an exclusive opportunity for energy industry IT executives.

Once customers had joined the community, the company's Community Manager began seeding

activity in the community. She focused her efforts in three areas:

1. Asking questions in the community about provocative, hot-button topics in the energy industry;
2. Posting invites to upcoming live events and webinars in the community; and
3. Requesting that customers contribute to an eBook on the future of the energy industry.

All three programs were successful, but the most interesting results centered on the eBook, where marketing received 20 high quality submissions from customer executives. The eBook became one of marketing's most valuable assets and impacted the business in a number of different areas:

- Widespread, energetic praise for the content from their current customers;
- Highest converting content asset in their lead generation and marketing efforts;
- Requests from other customers to be included in upcoming content; and
- Sales meetings with new prospects via the marketing of an eBook featuring the company's respected customers.

The entire eBook was sourced from the company's online community. The community not only created deeper engagement with customers, but also provided marketing with content that they could use to acquire new customers.

5 Steps to Building and Managing an Online Community

Step 1: Plan Your Community

The best online communities start with a good plan. The plan doesn't need to be long, but it should specify strategic objectives, key processes and activities, the organization, technology, and metrics. It should also detail who the target members are and why they will find value in the community.

Target members

It's critical that you understand who your target community members are. Your current customers are a great place to start. Conduct a handful of interviews with them to make sure that you understand who they are, what they care about, and how they would derive the most value from your community. Make sure that you capture this information in your plan.

You can develop personas for each of the major types of people you'd like to join your community. Developing personas for your current customers and prospects can be helpful. Just make sure that your personas capture specific information about why and how the member will use the community.

Strategic objectives

Your community can support a number of different

strategic objectives. It's useful to think of these objectives as falling into three categories: revenue; customer satisfaction; and product development.

Revenue objectives

- Faster revenue growth
- Larger upsells
- More peer-referred leads...

Customer satisfaction objectives

- Higher customer satisfaction
- Reduced churn
- Lower support costs...

Product development objectives

- Improved product/market fit
- Faster ship times
- Lower defect rates...

Process and activities

The plan should specify the standard processes and activities that you'll engage in to make your community a success. A key objective for your community should be to make it scalable and efficient. Standard processes and activities are essential to this.

You should focus on two sets of activities:

1. What will you do to identify, recruit, and onboard new members?
2. Once someone is a member, what will you do to continuously engage them?

For example, you may determine that engagement will depend on a weekly community newsletter or personalized emails.

Organization, technology, and metrics

Your plan should also address the organization and technology that will be required to support the community, as well as the metrics that you'll track to measure performance. The plan should name the community's executive sponsor and the person who will act as the Community Manager. You should also list the high-level technology requirements you've identified. Finally, identify the metrics that you'll track. Start with a small number of straightforward metrics, like total number of members and total number of active members.



Tool: 20 Common Online Community Applications

Lead generation – Turn community members into qualified leads

Revenue growth – Generate revenue by creating demand in the community

Inbound marketing – Create content that attracts new visitors/members

Email marketing – Build your email database with the community

Customer engagement – Create a deeper sense of engagement

Event marketing – Market upcoming events in the community

Sales enablement – Let the sales organization learn from the community

References and testimonials – Generate references from members

PR and announcements – Make major announcements in the community

Social sharing – Let members share content on Facebook and other social sites

Customer support – Let members provide customer support to other members

Online events – Host webinars in the community

Content creation – Use the community to "crowdsource" content

Executive briefings – Have executives brief members on key topics

Product ideation – Collaborate with customers on new product ideas

Product feedback – Gather product feedback from community members

Product testing – Have members act as beta users of products

Peer networking – Let customers, prospects, employees and partners connect

Brand affinity – Create greater brand affinity via the community

Customer advocacy – Identify customer advocates to support marketing

industry, you should prioritize requirements that help members connect with each other. Alternatively, if members will join to solve customer support issues, you should prioritize issues that will help people troubleshoot product issues.

Choose a technology provider

Every online community requires a technology platform to function. Remember to choose a technology provider that meets your members' requirements and will be easy to set up. It helps to focus on the following areas when choosing a technology:

1. How easy will the technology be to set up?
2. Does it offer the three to five core features that members require?
3. How easy will it be for members to sign up and participate in the community?

Create design and copy elements

Once the platform is up and running, you need to create design and copy elements. For example, many online communities have an "about" page that requires copy. You will also want to brand your community with your logo and "look and feel". None of this is particularly challenging – you just need to make sure that you've paid attention to these small things that make your community look like a finished, polished destination.

Given the technology and best practices that exist today, you can expect to have your community up and

Step 2: Build Your Community

With a plan developed, you can start building your community. It's actually a straightforward process as long as you have a methodology or framework to guide your efforts. There are three simple steps you can follow to make sure that your community build-out is as efficient as possible.

Understand member requirements

When building out the community, you need to first understand what prospective members will want from the community. Start with the fundamental question – why would someone join the community in the first place?

The answer to this question will help you understand specific requirements. For example, if members want to be able to build their social network in a specific

running in a matter of weeks, if not days. At this point, you can begin recruiting and engaging members.

Step 3: Recruit Community Members

Now that you have a community platform in place, you can begin recruiting members. Successful recruiting is based on three things:

1. Offer prospective members a compelling reason to join;
2. Create the perception that the community is active and engaging; and
3. Make it extremely easy for people to join.

A compelling reason to join

The foundation of successful recruiting is to offer people a compelling reason to join your community. You should always ask – what’s in it for the members?

Different people will join for different reasons, but you should focus on two types of potential members – existing customers and prospects. Existing customers are likely to join the company to resolve product issues and stay up to date on issues specific to the company and product. Prospects, on the other hand, are likely to join the company because they want to engage with people like them around more general issues and topics.

The early adopter program

In order to build early momentum in the community, you need to identify and recruit a small group of early adopters who will drive the majority of early activity. Remember that this early activity will attract additional members over time.

TIP!

Make sure employees are active in the community early on.

You should identify a small number of members who will participate regularly. Good candidates for this include employees, existing customers who have a strong affinity for the company, and people who are active on social media in your market.

In the early days, don’t be afraid to use personal one-to-one outreach to recruit the initial members of your community. Use a combination of email and the phone to recruit the first several dozen members. And remember – offer these early recruits a compelling reason to join the community.

Scale your recruiting efforts

Once you understand the recruiting tactics that work for you, you can begin scaling the program. The

most obvious places to recruit additional members are your current customers and employees.

You should also start to expand your recruiting efforts to people who don't have a pre-established relationship with your company. Look for prospects in your target market who are already active on social media, whether it be Facebook, Twitter, or LinkedIn.

The good news is that there are a variety of channels you can use to recruit members at scale. Some channels are more appropriate for existing customers, while others are better suited for recruiting prospects. Whatever your target, make sure that you employ a handful of different tactics so that you can test what works.



Tool: 10 tactics for recruiting community members

1. Email

Make email outreach the foundation of your recruiting efforts.

2. Social media

Use social media outlets like Twitter, LinkedIn, and Facebook to engage prospective members.

3. The sales team

If you have a sales team, use them to recruit members in to the community.

4. Customer support

Train customer service to promote the community when they engage customers.

5. Your executive team

Enlist executives at your company to recruit community members.

6. Google (and other search engines)

Make sure that Google is indexing your community's content so that people find your community via search.

7. Events

Promote your community at customer events and conferences.

8. Your website

Your website should promote the community on the homepage and in blog posts.

9. Existing community members

Get existing community members to recruit new members via email and social media.

10. Employees

Many of your employees have expansive networks, so make sure they are actively recruiting their connections to join the community.

Step 4: Engage Your Community

Once you've recruited members into your community, you need to make sure you engage them on a regular basis. Effective engagement comes down to making members aware of activities in the community that are relevant to them.

Relevant community activity

Your members want to engage around community activity that is relevant to them. The technology that powers your community should enable members to follow specific topics and members. This way, members can have a highly personalized experience in the community that is more relevant and valuable to them. By providing members with relevance and context, they are more likely to stay engaged.

The importance of email

Email is the most important communications channel at your disposal when it comes to engaging community members. Your technology platform should send notifications to members when something happens in the community that is relevant to a particular member. For example, if a member asked a question and someone answers it, they should receive an email notification. Similarly, the system should send a weekly digest or summary to members.

TIP!

Email is the most powerful community engagement tool available to you... use it.

Personal outreach

While email is the primary tool you can use to engage the community at scale, personal outreach can also be effective. Your Community Manager (CM) should use email, social media, and the phone to conduct personal outreach to high-value members. In fact, the CM should do this every day to drive engagement with specific members around specific activities and topics.

Recognizing participation

You should also make sure that you recognize members who participate in the community. Many communities employ things like points, leaderboards, and rewards (what's called gamification) to do this. It's an effective tool for incenting and rewarding active, engaged members.

The Community Manager should also personally recognize active participants. A personal thank you via email always works well. You can also acknowledge exceptional contributions in the community newsletter and in the community itself via weekly "roundup" posts.

Step 5: Analyze and Optimize

Measuring your online community is critical to determining whether it's having an impact on your business. You should track strategic metrics that show how the community is supporting key business objectives such as revenue growth, as well as operational metrics such as the number of members in the community.

Strategic metrics

An online community can have a material impact on strategic business objectives such as revenue growth and customer satisfaction. As a general rule, prospects and customers that are engaged with you will buy more from you, tend to be more satisfied, and remain customers longer. Establishing a direct correlation between strategic results and community engagement can be challenging, but is possible with a little bit of community and CRM data.

Operational metrics

You should also track operational metrics that tell you how the community is performing at a more tactical level. There are dozens of operational metrics to track and analyze, but you can start out by focusing on a handful of metrics such as:

- **Number of members** – Track the number of community members and the growth rate from month to month.
- **Number of active members** – You should also track the number of members who are actively participating in the community.

- **Amount of content** – Measure the amount of content that's being created by the community by tracking the number of URLs being created.
- **Amount of activity** – Track the amount of activity (posts, questions, answers, votes...) that the community is generating.

Tracking performance

You should track these metrics weekly and use them as the basis of a weekly online community meeting where you discuss the performance of the program. The most important part of this meeting is to make sure that you act on the data. For example, if not enough new members are actually participating in the community, you may need to increase your email outreach efforts or optimize your onboarding process.

Conversely, if you identify something that is working, you will want to repeat it. For example, you may find that on days when you seed five questions before 9AM, activity is 50% higher than on days that you don't. You should make this a standard daily practice.

If you're tracking the right metrics and activities, it won't take long for you to realize what's working and what's not in your community. Just remember to keep it simple when first starting out.

Organization and Technology

The Organization

The organization that's required to support the community is actually quite straightforward. The Community Manager is critical to the success of the community, but you should think of the organization as having three layers: the executive sponsor; the Community Manager; and company employees.

The executive sponsor

Your community is where your most important assets (future and existing customers) go to engage with you and each other. As such, it's truly strategic and needs an executive sponsor. The executive sponsor can be a CMO and/or VP of Customer Service depending on the objectives. Wherever they come from, make sure they can act as the "voice of the customer" to the rest of the organization and the market.

TIP!

Make sure that the executive sponsor is a natural at being the "voice of the customer."

The Community Manager

The Community Manager – The CM is the functional owner of the community. They are responsible for day-to-day management of the community and making sure that it meets the company's business objectives. This person typically resides in either the marketing or customer service organization, again, depending on the community's primary objectives.

They should be passionate about the company and its customers. They should also be naturally social and able to drive real engagement with prospects and customers alike.

Key Responsibilities of the Community Manager

- **Business planning** – Identify key business objectives that the community will support.
- **New member recruitment** – Identify and recruit new members to join the community.
- **Community seeding** – Seed activity by publishing posts, asking questions, and sharing content that is designed to spark member activity.
- **Member engagement** – Engage members by reaching out to them via email and the phone if need be.
- **Metrics and optimization** – Measure the effectiveness of the community by tracking

and optimizing key metrics such as number of members and contributions per member.

- **Community liaison** - Act as the liaison between community members and other parts of the organization such as support, product, and sales.

Company employees

It's also important to involve a wide range of employees in the community. Employees from marketing, customer service, and product development make great participants. You should also involve executives in the community. Members value their participation and really appreciate it when someone like the CEO participates in something as simple as a Q&A thread.

Technology to Power Your Community

The technology you choose to power your community plays a critical role in determining how successful your community will be. The technology you choose determines a variety of factors such as how easy it is to build and manage the community. Most importantly, it plays a huge role in defining the experience that members will have in the community.

That's why you need to make sure that you choose a technology that will meet your target members' requirements, as well as the requirements of employees who will support the community. When considering technology options, you should pay attention to a handful of essential requirements.



Tool: A Day in the Life of a Community Manager

Community Manager Calendar: Tuesday, December 3

8:00 - 8:30	Arrive at office, grab coffee, check latest community activity
8:30 - 9:00	See particularly hot conversation; share with 5 members via email
9:00 - 9:30	Search internet for breaking topics relevant to customers
9:30 - 10:00	Share 3 articles and ask 3 questions about each topic
10:00 - 10:30	Conduct 1:1 outreach with 10 active members around new topics
10:30 - 11:30	Meet with design team on new look and feel for community
11:30 - 12:00	Run reports on number of members and participation metrics
12:00 - 1:00	Lunch with CMO to update her on key metrics and performance
1:00 - 1:30	Conduct 1:1 outreach with additional 10 active members
1:30 - 2:00	Ask co-worker in product development to answer three questions
2:00 - 3:00	Con call with partner on having them participate in community
3:00 - 3:30	Check that email notifications are being received by members
3:30 - 4:30	Respond to emails from handful of community members
4:30 - 5:00	Provide feedback to product team on feature requests

! TIP!

Focus on making it easy for members to join the community.

Essential Technology Requirements

- **Core engagement features** – Successful communities provide members with features that allow members to engage with each other. For example, some communities allow members to write posts or share content. Other communities provide rich Q&A features that allow members to ask each other questions. Just remember to pick no more than three features that you think will drive the vast majority of engagement in the community.
- **Lightweight social features** – There are also a number of lightweight social features such as voting or liking that the technology should support. Remember that a lot of the activity in your community will be built around these lightweight features.
- **The activity stream** – Your members should be able to follow certain topics and people that are relevant to them. What they follow will then populate their activity stream so that they only see activity and information that is relevant to them.
- **A great member experience** – Your members won't participate in your community if it doesn't offer them a great experience. Focus on ease of use. You need to make it easy for people to join and participate in your community.
- **Email notifications** – Great online communities use email notifications to remind people to come back to the community. The technology you use needs to be able to send members alerts about certain activities in the community.
- **Member profiles** – You'll need to offer members the ability to create and manage their community profiles. This isn't a complicated requirement, but it is an essential one.
- **Gamification and rewards** – Many companies offer members things like points and rewards for participating in the community. They can be a powerful incentive to drive engagement and participation.
- **Reporting and analytics** – You should be able to access basic dashboards and reports that provide visibility into membership metrics and community activity.
- **Ease of setup and management** – Finally, it's critical that the community be easy to set up and manage. Try to use software that is delivered as a service (SaaS). You should also look for software that is easy to customize to your brand's look and feel.

Technology Requirements Checklist

Requirement	Must-Have	Nice-to-Have	Not Required	Notes
Share content				
Write posts				
Q&A				
Comments				
Votes/Likes				
Activity Stream				
Signup Process				
Member Profile				
Ease of Use				
Gamification				
Branding/ Design				
Email Notifications				
Analytics				
SaaS Delivery				
Ease of Setup				
CMS Integration				
Administration				

How to Get Started

Starting an Online Community

Your online community can be one of your most powerful assets. It has the potential to impact a range of strategic business objectives. There are three objectives in particular that an online community can support.

- **Revenue growth** – More and more buyers are looking to their peers when it comes to making purchasing decisions. Furthermore, existing customers that are truly engaged with a company will spend more money with that company.
- **Customer satisfaction** – Companies that engage their customers socially tend to receive higher customer satisfaction ratings and experience lower churn.
- **Product development** – Companies with online communities are building better products because they are able to include customers in the product development process.
- **Established best practices** – There are now some well-known best practices associated with designing, building, and managing online communities.
- **Easy-to-use technology** – The technology that powers online communities has become feature rich and easy-to-use.
- **Conditioned social behavior** – Finally, most people have now had a social experience online. It might be via a major social platform like Facebook, Twitter, or LinkedIn, but people are conditioned to participate in social communities online.

Because of these established best practices, easy-to-use technology, and the proven results associated with communities, it's easy for companies to get started. We hope that our Online Community Playbook provides the blueprint you need to design, build, and manage your own online community.

These are extremely compelling benefits that span sales, marketing, customer service, and product development.

At the same time, it's never been easier to create an online community. There are a few factors that are making it easy for companies to build their online communities. These include:

The 10 Point Quick Start Checklist

1. Develop a 90 day plan

Specify the business objectives that your community will support. These objectives are typically related to sales, marketing, and customer service. Your plan should also identify what resources you'll require to make your community a success. Most importantly, identify what you'll do in the first 90 days to make the community a success.

2. Build a lightweight team

The community will need the support an executive sponsor, Community Manager, and employees. The Community Manager will spend the most time managing the community, but assigning an executive sponsor and recruiting co-workers to participate are critical to success.

3. Select a technology provider

The technology you choose to power your community will define many of its attributes. Choose a community platform that provides members with a great user experience and Community Managers with easy setup and administration.

4. Build the community

Once you've selected a technology, you can start to build out the community. Make sure you understand how people become members and the features that

will drive real engagement in the community. You should also spend time ensuring that the community will incorporate your branding guidelines.

5. Recruit your initial members

Identify and personally recruit approximately 20 members whom you think will be active participants in the community. Some of these people can be employees, but most should be existing customers who are passionate about your business. Make sure they have a proclivity to use social media.

6. Seed activity

Even the most successful communities didn't start from scratch. There's almost always someone who is seeding activity in the community, driving participation and engagement. The Community Manager should seed the community with posts, questions, and other forms of content every day

7. Engage early members

It's also critical that you engage members in a one-to-one fashion, particularly in the early days. Use email and even the phone to make people aware of key interactions in the community so that they can join in the conversation.

8. Collect feedback from members

Collect qualitative feedback from some of the initial members. Make sure that you identify the specific

areas that they are deriving value from. You should also make sure that you identify areas that you could improve.

9. Review results

After 30, 60, and 90 days, review the results of your efforts. Has membership grown? Are you seeing real participation and engagement? Is there a lot of content being generated? If you like what you see, get ready to roll the community out to a larger audience.

10. Promote the community

Now it's time to promote the community to a larger audience. As you reach out to a larger group of customers, prospects, employees, and partners, remember that you already have an engaged community in place.

Thanks for reading the Online Community Playbook!

ABOUT TOPO

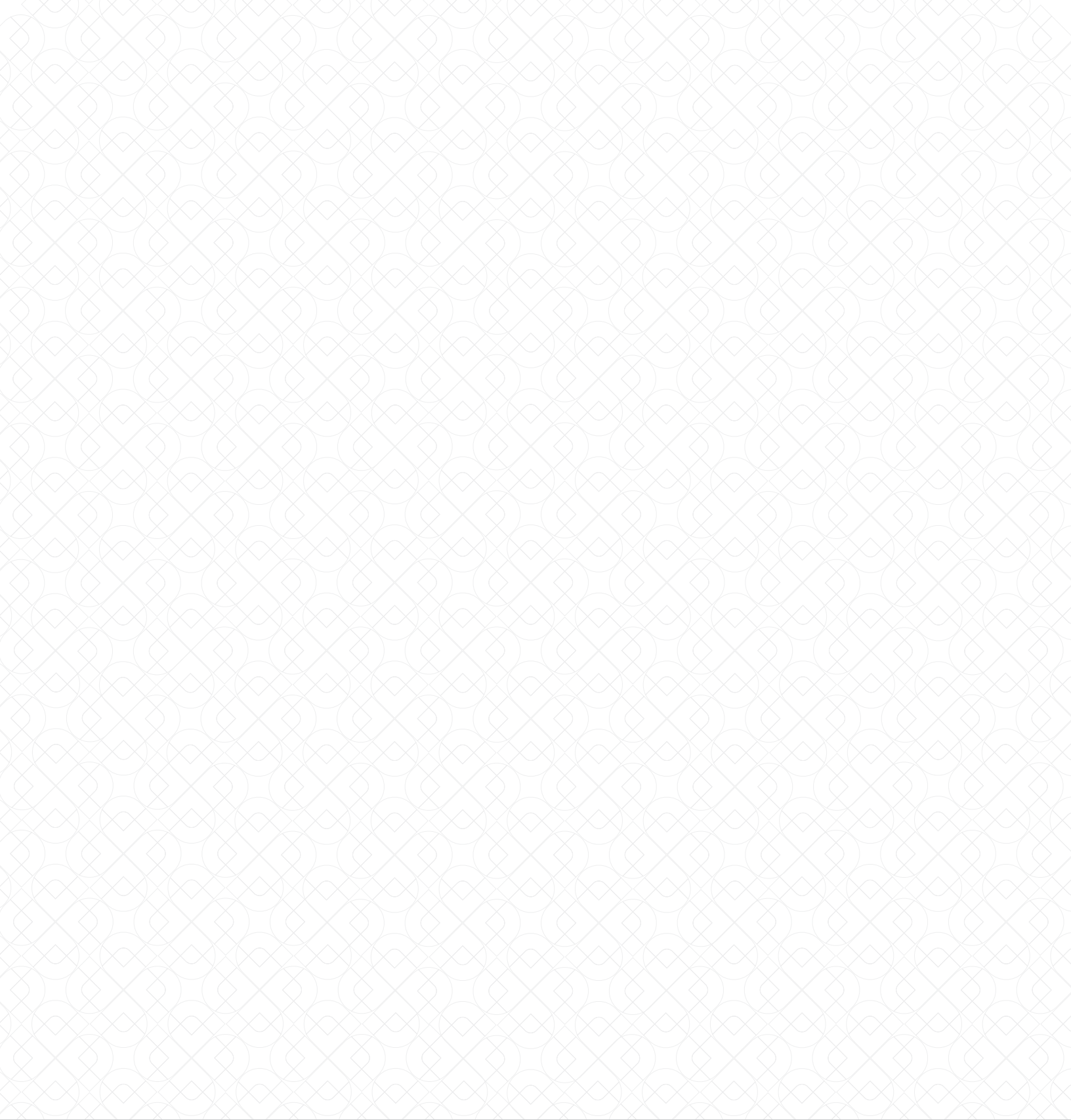
This Playbook was created by TOPO, a research, advisory, and consulting firm that believes in a really simple, but powerful idea - that the most important thing in business is to deliver a great buying experience.

Learn more at www.topohq.com

ABOUT DNN

DNN provides a suite of solutions for creating rich, rewarding online experiences for customers, partners and employees. Our technology is the foundation for 750,000+ websites worldwide and our customers include True Value Hardware, Bose, Cornell University, Glacier Water, Dannon, Delphi, USAA, NASCAR, Northern Health and the City of Denver. In addition to our commercial solutions, DNN is the steward of the DotNetNuke Open Source Project.

Get started with DNN Evoq™ Social today - call us at (650) 288-3150 or visit dnnsoftware.com.



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