Create, recruit, engage

22 proven and practical tips
for managing communities

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Read me: I am important

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How to create high-engagement communities

These tips have been put together by the experts at Vision Critical based on their considerable experience with the design, recruitment, and management of online communities.

The tips give practical advice on how to provide a rewarding and fulfilling experience for community members from the initial stages of recruitment to building an ongoing relationship through activities and feedback.

1

Think mobile first when designing activities

Today's customers choose whether or not to participate in companies' online communities. Their feedback is invaluable, so it makes sense we solicit their input on devices most convenient for them. Increasingly, customers are reaching for their mobile devices to participate in online communities.

Approximately 50% of activities are taken on a mobile device or tablet, so it is extremely important to keep small screens in mind when designing and programming an activity.

FIVE BEST PRACTICES FOR MOBILE

1. BE CONCISE
2. ALWAYS TEST YOUR ACTIVITY ON A MOBILE DEVICE
3. AVOID GRIDS AND RANK ORDER
4. LIMIT THE NUMBER OF OPEN-ENDED QUESTIONS
5. SIZE IMAGES FOR SMALL SCREEN AND USE ONLY WHEN NECESSARY

2

Create personas when recruiting

People want and expect a personalized experience in online communities. Messaging needs to speak directly to customers and allow them to connect emotionally with the community sponsor. However, it's difficult to get to know each person individually.

Consider using personas to define your customer groups. Personas are fictional, generalized representations that help you relate to your customer groups as humans, and can help you tailor recruitment approaches to each group.

Classic Carol

Background:
• Head of Marketing at a software company
• Worked at the same company for 8 years; worked her way up from Marketing Specialist
• Married with 3 children

Demographics:
• Female
• Age 39
• High income

Identifiers:
• Appreciation for art and design
• Health conscious and fit
• Uses email for communication
• Visits social media to keep up with trends

3

Brainstorm recruitment sources

Customer personas for key customer groups can help your company discover unique ways to locate and approach members to join your online community.

For example, the "Millennial Melanie" persona shows you she prefers social media, spends time online, and is a full-time student. Therefore, some ways to approach "Melanie" would be via communications she has subscribed to with your company (email), online intercepts/banners, and through university message boards.

Millennial Melanie

Background:
Melanie is a university student studying business administration. She likes volunteering, playing sports and reading sci-fi novels.

Demographics:
• Female
• Age 20-24
• Single

Identifiers:
• Spends a lot of her time on her smartphone
• Actively involved on campus
• Prefers social networks over email

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Create a positive
first impression

The invitation survey is the first impression members have of your online community. The invitation survey should generate enthusiasm, educate and inform members, and collect their qualification information. At the same time, the survey should remain short and engaging.

Remember, you can build on the relationship with the members in your online community over time so only essential questions are necessary in the invitation survey. As you learn more from your members, update your personas to keep them robust and available for ongoing recruitment.

INVITATION SURVEY CHECKLIST

- ✓ MOBILE-ENABLED
- ✓ AVOID DISQUALIFYING PEOPLE UNLESS NECESSARY
- ✓ SET EXPECTATIONS OF WHAT COMMUNITY MEMBERSHIP WILL BE LIKE
- ✓ INCLUDE 1-2 RELEVANT INDUSTRY OR TOPIC-SPECIFIC QUESTIONS TO BE MORE ENGAGING

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Design engaging messaging when recruiting

Customers want to feel like you are talking directly to them, so companies can no longer rely on a one-size-fits-all approach to recruitment. You can leverage the work you have done on creating personas to help.

Once you have "humanized" your personas (brainstormed characteristics, assigned a photo and name to each, and discovered unique ways to recruit), you can start to design your messaging to fit each group.

On the next page is an example of a social media recruitment message. The tone is conversational and short. In addition, the call to action is easy to find.

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Explain the community purpose when recruiting

Tell people what the online community is for so they can get excited and invested in the purpose. Think of a purpose that would appeal to your customers and communicate it from their viewpoint. Some examples include:

- Help us create products and services personalized for you
- We want to make it easier for you to get our products and services
- Help inform the future direction of our company

Challenge:
A Sports Media/Entertainment company saw a drop in attendance and TV ratings for a specific sport. As a result, the company wanted to bring engagement and excitement back to the sport.

Solution:
An online community was created called the "Official Fan Council." Members included passionate fans who provided meaningful feedback on watching the sport.

Impact:
TV ratings and viewership increased for the first time in 3 years and costs decreased by 80%.

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Set expectations from the beginning

Set expectations right away on what being a community member means to your customers. Give them an idea of what you will be asking them to do, with actual example topics and hook questions.

Members will appreciate the experience more if they know what they're getting into and base their judgement on the first activity. Be straightforward, keep it short, and easy to complete.

> ### SET EXPECTATIONS ON:
>
> ✓ **CADENCE OF ACTIVITIES**
>
> ✓ **FREQUENCY OF SHARING BACK**
>
> ✓ **RELEVANT TOPICS FOR ACTIVITIES**
>
> ✓ **ACCESSIBILITY OF ACTIVITIES (SHORT AND MOBILE-FRIENDLY)**

8

Encourage a sense of community membership

Being in an online community is similar to any other community: your neighborhood, circle of friends, or social media groups. Your customers want to feel like they belong in your online community and are a part of something special with a purpose.

You can do this by creating a unique look and feel to your community, so members are proud to be a part of it. For example, create a name and creative that represents your brand but is unique to the community. Additionally, you can send members sneak peeks or insider knowledge that is exclusive to them.

> **"**
>
> *"Sense of Community is a feeling that members have of belonging, a feeling that members matter to one another and to the community, and a shared faith that members' needs will be met through their commitment together."*
>
> **- McMillan, 1976**

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Encourage a sense of community influence

Your customers want to feel like their time and opinions matter. Create a community experience where members feel like they have a say. Members need to know that someone is listening.

You can do this by sharing back what you're doing with their feedback, what decisions are being made, and what will be changing as a result.

> "People who acknowledge that others' needs, values, and opinions matter to them are often the most influential group members, while those who always push to influence, try to dominate others, and ignore the wishes and opinions of others are often the least powerful member."
>
> - Sense of Community
> (McMillan & Chavis, 1986)

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Create an engaging member portal

Many online communities have a portal where members can log in and access activities. Portals can promote a sense of community; people have a place to engage with other members, share ideas, and connect. Remember that community portals are reflective of your company so the look and feel should be consistent and match your brand.

Some examples of content to include in your member portal:

Welcome Message:
Introduce members to the community

Quick Polls:
One quick question on a relevant topic

Activity Recap/Shareback:
Share recent results with members so they know what to expect

Member Spotlight:
Introduce members to each other

Behind the Scenes:
Provide members with information they can't find anywhere else

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Stop repeating yourself

No one wants to be asked the same thing over and over; repetitive questions can frustrate your customers and it implies you're not listening to them. More importantly, you are not using the power of your online community to profile your members and gain insights that drive important business decisions for your company. The longitudinal nature of online communities provides more opportunities for a variety of insights.

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Keep it interesting

Even though you may do similar surveys, community members crave variety and different experiences! Consider putting together a calendar of activities to ensure an array of business questions are being addressed at least once every six months, or by activity type (e.g., online journaling or discussions).

Consider adding in "persona building" activities to mix it up. Include short and interactive activities that go beyond business objectives to shed light on who your members are, what they think, and what motivates them.

Persona building allows the community manager to learn more about customers and provide more depth to the member relationship.

## Persona Builder Attributes

1. Keep it short and easy for members to complete (4 closed-ended questions + 1 open-ended question).
2. Collect relevant demographic and lifestyle information.
3. Enrich the personas by designing activities around themes that are relevant to the community members and your business.
4. Share back what you learn with your members and your stakeholders.

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Show gratitude

Your customers want to feel like their participation is appreciated. Remember to show gratitude and thank members for sharing their insights and opinions.

You can also offer "surprise & delight" rewards for participation, but avoid incentive programs aimed to motivate individuals. Incentive programs aren't sustainable; people who expect money for their time lose their innate desire and motivation to participate. A sense of community can be lost when the focus shifts from genuine participation in research to extrinsic rewards.
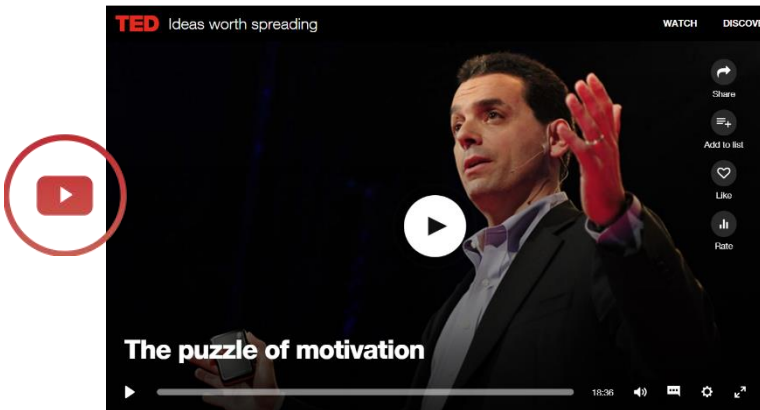
Source: The puzzle of motivation, Dan Pink via TED

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The shorter the better when designing activities

One of the goals of your community is to develop an ongoing relationship with your customers. Members don't want to do long surveys anymore, which is why survey response rates are low and plummet each year. Most customers prefer surveys that are less than 10 minutes long, according to the GreenBook Research Industry Trends Report.

If you have a longer activity, consider splitting it in two. One of the benefits of an online community is the iterative process; it's better to have several shorter activities than a long one that leads to fatigue. Engaging members more frequently with shorter activities can help cultivate an ongoing relationship with members.

"

"People generally lose concentration after eight seconds, highlighting the effects of an increasingly digitalized lifestyle on the brain."

- Source: Microsoft survey of Canadian media consumption

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Share back to members

Share-backs are important as members get to see firsthand that their feedback was valued and used for positive change. Members have a more positive brand experience and are more engaged in their community when research results are shared. The table below shows the key reasons why individuals join and remain active in communities.

REASONS FOR JOINING AND REMAINING IN A COMMUNITY:

1. FIND OUT ABOUT NEW PRODUCTS
2. HAVE A VIP EXPERIENCE, OR ACCESS INSIDER INFORMATION
3. BE HEARD
4. LEARN SOMETHING NEW
5. RECEIVE ACTIVITY RESULTS
6. LEARN HOW THEIR FEEDBACK INFLUENCES DECISIONS

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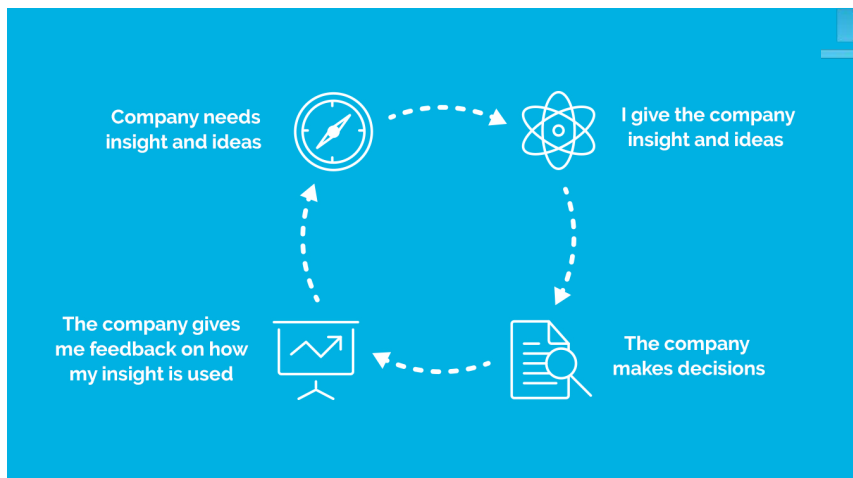
Keep the conversation going

Online communities encourage members to share stories about themselves and their experiences. Companies can use probing questions to get people thinking and start a dialogue with community members. For example, ask a "Think Aloud Question" where members recount a recent experience in as much detail as possible. The goal of this activity is to capture evaluations based on the "voice of the customer." It allows the consumer to assess a situation or a product in their own words, rather than reacting to structured questions.

Example:
"We're very interested in learning about your experiences when shopping for [Category]. To learn more about this, we would like for you to tell us about your last shopping experience for [Category].

Think back to the experience and try to share everything you can remember. Start when you entered the store... what was the shopping process you followed that led to your decision to buy that specific brand? What were you thinking and feeling?"

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Encourage storytelling

Encourage members to their stories—about themselves, about their experiences, and about your brand. This helps members to get to know one another and feel an emotional connection to others in the community. It can also help you uncover hidden insight and inspire new ideas across your organization.

You can share members' stories through regular share-backs, your community portal, and in activities.

> "
>
> *"A lotto and gaming company was collecting stories about how customers choose their lotto numbers. They received fascinating stories! One was so impressive they followed up with the member and ultimately produced a TV commercial that features her and her story."*
>
> - Vision Critical customer story based on actual online community use case

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Create the right farewell message

If a decision is made to shut down an online community, it is important to notify the members in an authentic and transparent way. Members view the community as an extension of your brand and will express their opinions about the experience via a variety of channels (e.g., social media).

Make sure the sunset messaging is written in the right tone to match your brand and provides a way for members to leave comments. Consider keeping an activity open for the remaining weeks of the community so members can submit feedback.

Recommended Content in Sunset Messaging

- **Thank members for their time and participation.**
- **Inform that the portal will be taken down, and there will be no further invitations/share-backs.**
- **Recap main decisions made from community input.**
- **Assure that information is protected by the Privacy Policy.**

Share back results when sunsetting your community

Members contribute to various activities over the life of a community, so it is recommended to send a summary of results if you are shutting the community down.

When a community shuts down, the aim is to leave members with a good impression of your company. It's important to first thank community members for their time and effort. Then consider including an infographic of the results or a summary newsletter of all the insights you have collected over time that members have contributed to.

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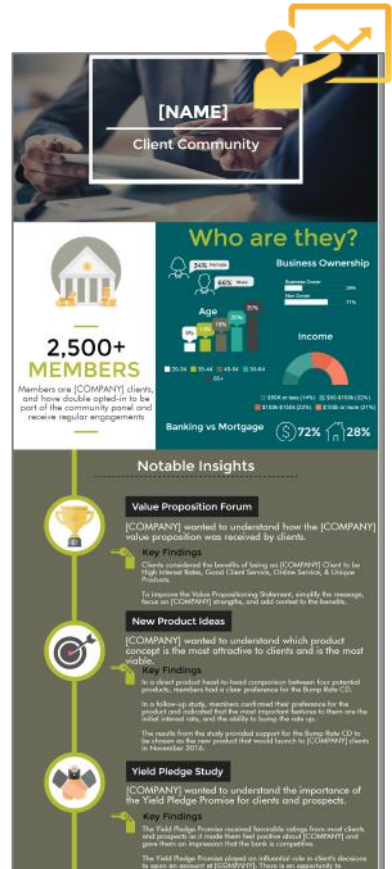
Be careful when rebranding or changing a community experience

If your company is going through changes that require you to rebrand or restart your community under a new name, it's important to notify members that you are doing so and allow them to decide whether they stay or go.

You should inform members of the change, thank them for their participation to date, and encourage them to continue membership in the "new" community. Transparency with members is key in building authentic relationships.

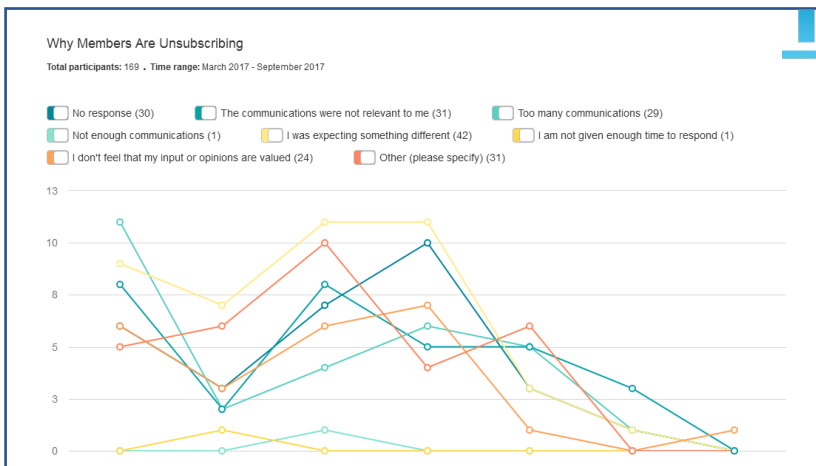### WHEN THE NEW COMMUNITY LAUNCHES…

- HIGHLIGHT WHAT HAS CHANGED (NAME, BRANDING, ETC.).
- ASK MEMBERS TO BOOKMARK THE NEW COMMUNITY DOMAIN.
- INVITE MEMBERS TO A FEEDBACK ACTIVITY.
- PROVIDE A REMINDER OF INFORMATION PROTECTED BY PRIVACY POLICY.

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Be respectful when members unsubscribe

At any time, your members can decide they no longer want to be a part of the community. People may leave the community for reasons that are out of your control; they are too busy, are no longer a customer, or have lost interest in the topic. Other reasons for leaving may be in your control; they feel like they aren't being listened to, are not receiving any share-backs, or don't feel a sense of community.

If possible, ask individuals why they are leaving when they unsubscribe so you can be aware of any improvements you can make.

Why Members Are Unsubscribing

Total participants: 169 . **Time range:** March 2017 - September 2017

- No response (30)
- The communications were not relevant to me (31)
- Too many communications (29)
- Not enough communications (1)
- I was expecting something different (42)
- I am not given enough time to respond (1)
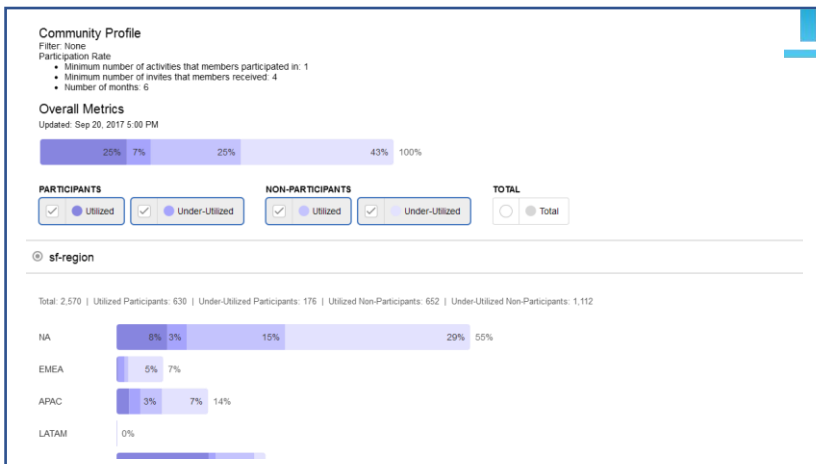- I don't feel that my input or opinions are valued (24)
- Other (please specify) (31)

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Use member health metrics

A healthy community is one with engaged members that are motivated to participate. An involved community leads to higher response rates, better quality data, and lower churn.

Key community health metrics that should be tracked include size, participation and utilization, community profile, activity cadence, and response rates. Non-responders can be removed on a regular basis to free up space and improve data quality. New members should be recruited regularly to provide a fresh perspective and boost the size of the community.

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