

COMMUNITY STRATEGY (TEMPLATE)

PREPARED FOR

**[list recipients]**

PREPARED BY

**[list recipients]**

**Date:**

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***Notes [delete this]:***

*Creating a strategy for an existing community is slightly different from creating a strategy for a new community. There are some sections of this template which only apply to existing communities. If you haven’t started your community yet, you can skip these sections. But try not to skip any other section. Each phase logically needs into the next. If you skip a phase, you’re probably taking a ‘leap of faith’. Leaps of faith are great for Indiana Jones movies, but they’re not so great when it comes to strategy.*

# EXECUTIVE SUMMARY

Every community strategy should begin with a summary for the busy folks who won’t have time to read the full strategy. While this section appears first, you should write it last (otherwise what are you summarising?)

Your summary should outline:

1. The problem this strategy is trying to solve (or opportunity it will seize).
2. How the strategy will solve it.
3. Key discoveries from research.
4. Key value of the community to you and the audience.
5. Required resources.
6. Key challenges to overcome.

This should be no more than two pages. I often include a simple one-page overview graphic showing the community strategy. If you’re working in a large organisation, you probably also want to create a short presentation of 5 to 10 slides here which can be easily shared around and understood.

Your goal in the summary is to make it easy for someone to grasp what you’re trying to do, the implications of what you’re trying to do, and say “*yes, go for it!*”

# 2.0 BACKGROUND

**DEFINING THE PROBLEM / OPPORTUNITY**

Your community should always solve a problem (or seize an opportunity) for you, your audience, and your organisation. Before you can do that, you need to define this problem or opportunity through research.

This section should *summarise what* you’ve learned from your research. Try to keep this brief. Selectively use one or two key charts, graphs, and quotes that best support your findings here and drop everything else into the appendices.

This section will usually include the following:

## 2.1 Community Analysis

If you have an existing community, begin by analyzing how it’s doing today. Don’t simply publish graphs showing metrics going up or down, but [get to the root cause](https://www.feverbee.com/root-cause/) of why they’re going up and down.

You should endeavour to anticipate and answer questions you’re likely to get. These questions will usually include:

1. **Is the number of people visiting the community rising or falling**? Look at the overall number of visitors to the community and where your visitors are coming from. This gives you a good indicator of the overall level of interest in your community and where the interest is coming from. What’s changed about the community or its audience?
2. **Are members finding the community engaging?** Look at your total contributions divided by your total number of visitors (or active participants). This shows you if members are finding the community more or less engaging when they do visit. Now find out why? What else has changed during this time period?
3. **Are members performing behaviors that are useful to us?** This is your value and impact metrics. Are members doing the things you need them to do to achieve your goal? If not, then why not?
4. **How does the community compare with best practices?** Use the benchmarking documents we shared as part of the course and identify some of the key findings here. Where are the areas which need more attention than what they are getting at the moment? What are the priorities for improvement?

**A quick word of warning**.

In many communities, traffic rises and falls on a seasonal basis. Some communities become noticeably busier or quieter during festive periods and summer holidays. It’s usually best to use year on year (YoY) data instead of trends over the past few months. This means it’s usually better to compare March 2021 to March 2020 as opposed to, say, March 2021 to January 2021.

Comparing how well you’re doing today against three months ago often just reveals seasonal trends. Comparing how well you’re doing compared with the same month last year gives you far more useful information.

**Writing A Problem Statement**

Summarise your research into 1 to 3 concise problem statements.

A problem statement is a concise summary of an issue and its causes.

For example: *“The monthly level of participation in the community has declined by 15% year on year. While active members still participate at the same level as before, there are fewer active members. This is due to fewer newcomers arriving at the community via search. The decline in search traffic is caused both by a decline of 2.5 places in the community’s average search ranking and fewer people searching for those terms.”*

A problem statement like this clearly reveals where to focus your efforts to resolve the problem.

## 2.2 Benchmarks

Now we compare how the community is doing compared with best practices. This is a qualitative standard that identifies areas of concern and opportunities for future growth. Use the benchmark templates shared within the course material to evaluate your community by strategy, engagement, superuser programs, gamification, onboarding, design, and the abilities of your community team (you can use our community accelerator tool: [www.feverbee.com/accelerator](http://www.feverbee.com/accelerator)).

You can list any skill or resource gaps here. For example, if you want to launch a superuser program and no-one has done that before - it’s a good idea to learn that skill first. Not every standard will be relevant for your community. That’s ok, simply complete the ones which are relevant to you.

## 

## 2.3 Stakeholder Analysis

In the stakeholder analysis, you’re aiming to assess how your colleagues feel about the community and identify potential community goals and concerns.

When working with a larger organisation, I try to host a workshop to bring together key stakeholders for a few hours to identify the goals of the community, build relationships, and provide an opportunity for everyone to voice their opinions, objections, and recommendations. Getting two people discussing an issue in the same room is the ‘stitch in time that can save nine’ later on.

If you can’t host a workshop, then interview each stakeholder individually. These interviews should uncover the fears and desires of stakeholders. I typically rank needs and fears by aggregate mentions. You can find our interview templates in the course material.

You can find a summary below:

|  |  |  |  |
| --- | --- | --- | --- |
| **PRIORITY LEVEL** | **NEED / DESIRE / FEAR** | | |
| 1 | Scale support to SMB Customers (want) | | |
| 2 | Avoid conflict between (and with) partners. (fear) | | |
| 3 | Drive high engagement, activity, and adoption rates. (desire) | | |
| 4 | Increase product adoption and usage of all features. (desire) | | |
| 5 | Identify product problems and learn why areas are not intuitive. (desire) | | |
| 6 | Develop an ‘award-winning’ support experience (desire) | | |
| 7 | Collect success stories / sales material for community members. (need) | | |
| 8 | Collect and promote great PR stories from the community. (need) | | |
| 9 | Gain coverage in the trade press. (desire) | | |

Your goals for the community should come from this research. Often the goals which pop up most frequently become the goals for the community. Limit your goals to just 1 to 3 to get started.

You can also summary your results in a stakeholder matrix as seen within the course videos.

## 2.4. Audience Analysis

Now we need to figure out what our audience truly desires.

This is where you summarise the results of your research. You should be able to identify the different segments of your audience, who they are, why each segment visits (or doesn’t visit) the community and what they want. You can use our surveys and interview questions within the course.

|  |  |
| --- | --- |
| **SEGMENT** | **SUMMARY FROM RESEARCH** |
| **Newcomers**  **(using our products for 0 - 1 year)** | * Drawn to the community by an immediate product problem and wants a response without being attacked for asking a ‘dumb question’. * Looking for examples and guides they can follow. * Worried about being overwhelmed with too much information too soon. * Typically asks for help via customer support and via friends they know who use the product (by email). |
| **Intermediates**  **(using our products for 1 - 2 years)** | * Most interested in Q&A and long-form content if well-organized. * Will sometimes browse questions and answer some if they know the answer. * Visit most frequently to get the latest product news and updates. |
| **Veterans**  **(using our products for 2+ years)** | * Visits frequently out of habit to see if there is something new they can learn from. * Cares greatly about the signal to noise ratio. Too much beginner level content in the community. * Likes to quickly scan the community and will open several tabs at once to respond to relevant questions at the beginning of the day. * Wants a more private place to chat with fellow-veteran users and feel a part of the company’s mission. |

**Broader Sector Changes**

You should also use your data to look at broader changes in the sector here. Are greater or fewer people interested in your topic? Are you likely to see newcomers drying up or increasing? What specific niches and new trends are emerging. What technologies are rising and falling in popularity. Use a typical PEST analysis (political, economical, social, and technological) analysis if you need a framework to think about trends[[1]](#footnote-0).

Your community should always be swimming with the tide, not holding out trying to fight current trends. It’s best to incorporate new trends as quickly as possible rather than dismiss and fight against them. Be a leader not a laggard!

List any major trends in this section. For example:

|  |  |
| --- | --- |
| **TREND** | **IMPLICATION** |
| **Rise in video and social media.** | * We need to support our community both inside and outside of a single platform. People ask questions on whatever tools they are most comfortable with. |
| **Rise in privacy concerns.** | * We may want to enable our members to participate anonymously and collect as little data about them as possible. |
| **Distrust in our brand.** | * Members increasingly distrust our brand due to negative experiences and broken promises in recent years. We must not make any promise to members until we are 100% sure we can fulfil it. |
| **Growth in niche** | * Our audience is increasingly talking about [new thing] and more groups are emerging about it. We should feature this as a key topic of discussion on the homepage of our community. |
| **50% mobile** | * Our audience use mobile when browsing our website 50% of the time and we should allocate 50% of our developing resources to mobile to match. |

## 2.5. SWOT Analysis

Now you can summarise all the research above into a simple SWOT (strengths, weaknesses, opportunities, and threats) analysis.

SWOT analyses have been a classic feature of business school strategy classes since the mid-1960s. In a SWOT analysis, you list your community’s (or organisation’s) strengths and weaknesses at the top and the opportunities and threats at the bottom.

The strengths and weaknesses should only cover *internal factors* already present in the community and the organisation. The opportunities and threats are *external factors* that come from outside the community. Some of the typical aspects of these are included below:

|  |  |
| --- | --- |
| **Strengths** | **Weaknesses** |
| List the unique advantages of your organisation or current community. This might include:   * Size or reach of your organisation. * Passion or enthusiasm of your customers. * Momentum you’ve established. * Contacts or reputation within your field. * Internal collaboration and resources * Technology platform you’re using. | List here the negatives you identified in your analysis so far. This might include those opposites.   * Limited size and reach. * Dispassionate or upset members. * Declining levels of participation. * Internal competition / conflict and/or limited resources. * Poor technology platform. |
| **Opportunities** | **Threats** |
| List here any unique *external* opportunities you have identified. This might include:   * New audience segments you can target. * Other member needs you can satisfy. * Partnerships with other organisations. * New trends or technology to take advantage of. * etc.. | List here the biggest potential *external* threats to the community. This might include:   * Potential legal problems (data privacy/security). * Competitors. * Changing member habits or behaviors. * Sudden change in executive sponsors of the project etc.. |

You should be able to list all your key findings into a SWOT analysis. It’s a good idea to share this document around and solicit feedback in the process. Remember the more input people have had into defining the problem, the more likely they will own the solution.

By this point you should know:

1. The problem(s) you’re trying to solve.
2. What your colleagues (or you want).
3. Who your audience(s) are and what each segment desires.
4. Broader industry and sector trends.

The research is the foundation upon which you build the rest of the community. When a community effort goes wrong, I can usually trace the problem back to a failure to do great research (or worse, ignoring great research).

# 3.0 CREATING THE COMMUNITY CONCEPT

Now you’ve done the research, you can start to craft the vision for the community and its value to both your members and your organisation. This is what I call the community concept.

If the concept is right, it becomes the magnet which draws members in and keeps them returning to generate incredible results for both themselves and your organisation.

If the concept is wrong, your community will have flickers of life but never quite catch fire. Typically the solution to a failing community is to relaunch it with a better, more powerful, community concept.

Creating a community concept isn’t a ‘spark of genius’ act of creation. It’s simply following your research to its natural and logical conclusion. The community concept you are creating (or, for an existing community, refining) should take advantage of your organisation’s strengths and opportunities while mitigating its weaknesses and threats.

**Note: Consider Present Multiple Options**

If you’re working for an organisation, it might be handy at this stage of the strategy process to present several community options of what the community could become. This again helps build support throughout the organisation for your community and ensures everyone has had a say in the final outcome.

One way to do this is to separate options by risk. You might have one option which is similar to what you’re doing now, one which is a bit of a risk, and one which is a real ‘shoot for the stars’ approach. Another way is to present different options based upon the different audiences you could serve.

In 2020, I was hired by Sephora to develop the strategy for its successful BeautyTalk community. The community had high levels of engagement but was being buffeted by changing trends and technology challenges.

Instead of presenting a single vision, I used the trends and research to present four possible concepts along with the pros and cons of each. By giving everyone a say in the process, people felt a lot happier with the final solution.

There are three parts to your community vision;

a) your guiding principles

b) your value statement to your organisation

c) your value statement to members.

## 3.1 Guiding Principles

Your guiding principles are a set of 3 to 7 constraints which narrow the scope and focus of your community to a few specific areas. Your principles should identify who the community is for (and not for), the value to the organisation, the value to members, what makes the community unique, and possibly a key challenge to overcome.

This is where your SWOT analysis really helps. The purpose of this stage is to *deliberately close off* areas your community could pursue to concentrate all your efforts on a handful of areas you can do extremely well. I’d recommend the principles covering the following.

* **Principle 1: Decide the target audience**. Outline who the community is for and who it isn’t for. It should be for a specific segment of your audience. If it’s for everybody (“all of our customers”), then it’s really for nobody. You can always expand later, but start focused on just one or two audience(s) for now.
* **Principle 2: List the unique, powerful, value to members**. Explain why this community is satisfying an urgent, relevant, daily needs members have (which they can’t satisfy anywhere else). If the need isn’t urgent or relevant to their *daily* lives members won’t visit very often. Again, use your member profiles to answer this. You shouldn’t have any competition for satisfying this need.
* **Principle 3: List the value to you / your organisation**. What is the indispensable impact your community offers your organisation? You need to be super specific here. What is the urgent problem that only your community can overcome? Is this an urgent, immediate, relevant need for you and your colleagues?
* **Principle 4**: **List what you need members to do to achieve this value**. As succinctly as possible, identify the key behavior(s) members must undertake. This is the critical battle of persuasion you must win. What has prevented this from happening so far? What is your unique, new, approach to overcoming it?
* **Principle 5: Explain how this will be future-proof**. Using your opportunities and threats from above, explain why your community will survive in a world of constant change? What is the sustainable competitive advantage the community will create which will keep people coming back? This might be a unique asset the community creates, a specific focus on the audience ,or a philosophy of following the audience whatever platform they may use.

You can add more than five principles if you need them, but try not to go above seven. Your principles restrict your efforts to a few core areas while still allowing plenty of freedom for the strategy to emerge and evolve. These principles serve as the guardrails for the rest of your community strategy.

**Examples of Strategic Principles**

If you find yourself stuck, let me share an example from a former client:

**Principle 1: Our community is for our small and medium business customers**. Other groups (large enterprises and partners) are welcome to join the community but our community’s unrelenting mission is to support these two audiences.

**Principle 2: Our community’s unique assets are speed and quality**. Our communitywill deliver faster and better responses than filing a ticket or using a search engine to get solutions to product questions. Our community will endeavour to rapidly solve every product problem our members encounter and proactively address issues they don’t even yet know they have. And we will do so with empathy and respect for the emotional needs of our members.

**Principle 3: Our community is the best way to scale our support efforts**. Smaller customers can’t afford premium support, yet they consume the majority of our support team’s time. This community lets us provide rapid, quality, responses at scale. We also know our members want to hear answers from people like themselves, this community provides that support.

**Principle 4: Our support efforts must become ‘community-first’ to succeed**. It’s critical we drive every possible customer to the community first to seek answers before filing a ticket. At every possible opportunity we will position the community as the priority means of resolving questions.

**Principle 5: We will treat our superusers like royalty**. Our community lives and dies by the willingness of a handful of members to answer the majority of questions. We will provide top members with a world-class VIP experience at every opportunity to encourage them to answer and solve questions.

**Principle 6**: **We will follow our members - wherever they will go**. We recognise members use a growing number of channels to engage with each other and get support. Our community isn’t limited by technology, we will meet our members on every medium they use and go wherever they go to provide them the support they need.

As these principles will guide everything else you do in your strategy, make sure you get support for them before proceeding any further. You can do this in a collaboration workshop with colleagues or go through each of them in turn to present why decisions have been taken and address any concerns your colleagues might have.

## 3.2 Value Statement For The Brand

Now you can get more specific about how your community helps you or your organisation. You should identify your short, medium, and long-term goals for the community along with the key metrics you’re tracking. We can look at our roadmap we put together earlier here to create this section.

|  |  |  |
| --- | --- | --- |
| **Short-term**  **(0 - 1 year)** | **Medium-term**  **(1 to 2 years)** | **Long-term**  **(2 to 5 years)** |
| Resolve 25% of customer support questions via the community. | Resolve 50% of customer support questions via the community. | Resolve 75% of customer support questions. |
| Increase customer satisfaction in our support efforts by 15% | Increase customer satisfaction in our support efforts by 30% | Generate 75 great testimonials. |
| Gather 5 insights for product development. | Gather 15 insights for product development. | Post 60 approved case studies. |
|  | Validate our engineering priorities using community data and ideas. | Validate our engineering priorities using community data and ideas. |
|  | Generate 25 great testimonials. | Generate 25 great testimonials. |
|  | Post 10 approved case studies. | Post 10 approved case studies. |
|  |  | Build a knowledge base of customer’s best advice. |
|  |  | Increase retention of newcomers through community mentoring. |
|  |  | Generate 50+ reviews on key community comparison sites. |

This is a process. You’re not going to be able to do everything you want from day one. Instead focus on slow, iterative, improvement. It’s a lot easier to get it right over time than the first time. You’re not going to be able to answer every question or recruit a small army of supporters on day one. But you might aim to answer 25% of questions and recruit 5 superusers within three months.

We can now create a simple value statement based upon this roadmap. I always try to make this value statement inspirational. Anyone who reads this should be pumped and excited to help make this happen.

**Example of an Organisation’s Value Statement**

In the **short term** we will:

* Resolve customer problems at a lower cost than any other support channel.
* Improve customer satisfaction by showing deep care for our customers throughout the community experience.
* Hear the beating heart of what our members think and use these insights to improve our products, services, marketing, and more.

In the **long-term**, we will do all of the above PLUS:

* Put our customers at the very heart of our decision-making process and use their feedback to guide everything we do.
* Use the community as our primary source for generating authentic reviews, testimonials, case studies, and PR stories.
* Drive all newcomers to the community to be mentored by experience pros and reduce our churn rates.
* Create a library of constantly updated best practices created by members for using our products and services.

## 3.3 Value Statement For Members

Now you need to clearly identify why members will join and participate in your community. What is the value for them? This should come directly from the audience research you’ve undertaken already.

**Example of a Value Statement for Members:**

This community will enable and encourage our members to:

* Get rapid solutions to every possible product problem and tackle issues before they arise.
* Learn how to get the most from our products and services.
* Feel a special part of our mission and influence our products and strategic decisions.
* Become a leader with a following of people who look up to them for advice and expertise.

It’s common at this stage to list every possible benefit members could want. But that’s not strategic, that’s wishful thinking. You need to ignore the majority of benefits to zero in on the core few which you can deliver on. Don’t try to do everything, just do three to five things extremely well.

# 4.0 SHORT-TERM STRATEGIC PLAN: 0 TO 3 MONTHS

Now you know the kind of concept you’re trying to create, you can start putting together your plan to achieve it.

## 4.1 Strategic Plan

At the beginning of each phase of your strategy, create a simple overview of your strategic plan (see note below). Some organisations prefer using ‘objectives and key results’ framework. This begins with a broad objective (i.e. create a scalable customer support model) and then lists specific activities which must be achieved during that time period (i.e. develop and launch a community, attract 200 active participants, answer 50% of questions organically)[[2]](#footnote-1).

**Note: The One Page Overview**

I’ve found it useful to create a simple one-page overview of the community strategy at each phase to include alongside the executive summary.

We already have our goals, but now we can be clear about the behaviors we need members to perform, the strategy (motivation principle) we will use to get them to perform the behavior, and then the tactics to execute this strategy. This should all come from the audience research you’ve completed.

You can see a completed example below:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **GOAL** | **Resolve 25% of customer questions through the community.** | | **Increase customer satisfaction in our support efforts by 15%** | **Gather 5 insights for product development** |
| **OBJECTIVES** | Get 500 newcomers to ask questions in the community instead of via customer support. | Get superusers to answer 50% of questions in the community. | Ensure every question receives a solution within 24 hours. | Get irregulars and superusers to suggest 50 new product ideas. |
| **STRATEGY** | Make newcomers feel the standard behavior is to ask in the community before calling customer support. | Make superusers feel like VIPs within the community | Make colleagues feel like this is a smart way of preventing more questions from coming downstream by answering them in a place where other people can see the answers. | Create a sense of scarcity to give specific insights during fixed windows. |
| **TACTICS** | Position the community as a prominent navigation tab on our homepage.  Create an onboarding series of emails to make newcomers feel confident and safe to ask questions within the community.  Move the contact us areas to the bottom of the pages and show questions in the community.  Turn our community into the primary support page with typical support questions featured later. | Build relationships with top 3 to 5 relationships and invite them to join a private group.  Link to unanswered questions in the group so members can provide an answer.  Share exclusive news first in the private group.  (requires getting internal approval first)  Initiate regular discussions soliciting and responding to advice and opinions from top members on the community.  Provide VIP experience at our annual conference. | Design the community to show the average time to respond and the number of responses which receive an answer and try to reduce that time each month.  Respond to any unanswered questions within 24 hours and escalate if needed.  Host a workshop series encouraging colleagues to engage in the community to prevent more questions later.  Embed related questions in the ‘contact us’ form from the community which members may wish to try first. | Run a challenge every 3 months to solicit feedback and ideas on a particular topic.  Top ideas are added to a shortlist and members can vote on the ones they like best (and add their expertise and refinement to the idea). |

**How To Select Your Tactics**

It’s pretty easy to come up with dozens of tactics to achieve any objective. The real challenge is narrowing them to the core few which will have the biggest possible impact.

You can use three-step criteria for thinking about the right tactics:

1. **How many people will the tactic reach?** The best tactics are those which reach the maximum possible percentage of your target audience. By reach, we mean they have not just received a message but open it and are able to recall it. A mass email, for example, might technically land in the inboxes of everyone but few people will both open and be able to recall it. Changing the homepage might have more reach as members are more engaged with what they’re seeing.
2. **To what extent will it change a member’s behavior?** Will the tactic profoundly change a member’s behavior within the community in a positive way? Again, a mass email is far less likely to change behavior than direct, personal, messages from the community manager. Often reach comes at a cost of depth, you may need to find a balance between the two.
3. **How long will the change last for?** Some tactics are novelties which wear off quickly. Others lead to prolonged changes in behavior. Sometimes you won’t know the answer to this question until you’ve tried it and seen the longevity of the impact.

We can use this criteria to make assumptions about the best tactics for our needs. For example, creating a blog post in the community probably won’t be seen by a large number of members, is unlikely to change behavior much, and whatever change does happen might not last for long.

However, other tactics, such as creating a superuser program or a detailed newcomer journey are likely to fare better in all three categories. Use your judgement initially to select the right tactics. As you begin getting data, you can prune the ones which aren’t working and test new ideas.

**Note: Don’t Select Too Many Tactics At Once**

In the reality TV show Kitchen Nightmares, one of the first things celebrity chef Gordan Ramsay would almost immediately do is reduce the size of the menu. The reason behind this is obvious. If a restaurant is offering hundreds of food options, are any of them likely to be any good? Do you even trust restaurants which offer a hundred food options? Instead, it’s better to specialist in offering five or six dishes in which a restaurant can excel and delight its customers.

Some of our consultancy projects often feel eerily similar (without the cameras and offensive comments). One of the first things we do is get the community team to list out every tactic they’re working on. Typically, we find they’re trying to do dozens of things at once. We try to identify the 5 to 7 tactics which really matter and coach the team to execute on them extremely well.

Don’t fall into the common trap of trying to execute on a dozen or more tactics at once. It’s impossible to achieve bigger results when you’re dividing your time into smaller chunks. 3 to 7 tactics is usually enough (if they’re the right ones). This doesn’t mean you should only have 5 to 7 tactics listed at each phase of your strategy. Some tactics might be one-off actions that don’t last the entire phase. It does mean that you should only be executing on 5 to 7 at any one time.

**Identifying Resources**

For every tactic you aim to undertake you should be able to answer the five key questions below:

|  |  |
| --- | --- |
| **Description** | **Action** |
| **Target Audience** | Who specifically within the community will this tactic target? |
| **Behavior change** | What change in behavior does this tactic aim to make? |
| **Execution** | What are the individual steps required to execute the tactic? |
| **Responsibility** | Who is responsible for executing each step required within the tactic? |
| **Resources** | What time, money, skills and approvals might be required to execute this tactic well? |

**EXAMPLE 1: Creating A Journey for Newcomers**

This is an example of a tactic. It includes the target audience, desired change in behavior, a brief description, the individual steps and required resources:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **TARGET AUDIENCE** | NEWCOMERS  (joined within past 3 months, made less than 3 contributions) | | | |
| **DESIRED BEHAVIOR CHANGE** | Ask questions in the community instead of calling customer support. | | | |
| **DESCRIPTION** | Create an onboarding series of emails to make newcomers feel confident and safe to ask questions within the community. | | | |
| **STEPS** | Meet with the IT team to ensure we have the capability to run an email automation series. | Sign up to the automation system and work with designers to create a standard template. | Create a series of 4 emails each focusing addressing possible member concerns about sharing in the community and the potential rewards. Use social proof at every turn. | Check open rates and tweak copy at the end of each month. |
| **TIME** | 2 hours | 8 hours | 12 hours | 3 hour |
| **FINANCIAL** |  | $2500 |  |  |

I can’t stress enough how important it is not to just come up with a tactic but to break it down into distinct steps and estimate how long each step will take. Often things that seem simple “*let’s send out an email to promote the community”* actually take a lot more time if you need to get approval from marketing, hire a designer, and have it proofread beforehand.

In fact, if you want to execute this really well, you might spend time researching which tactics have been most successful in the past, run split-tests, and create a more personalised experience based upon what information members might have already given you.

**EXAMPLE 2: Create A Private Group For The Top 3 to 5 Members.**

Let’s imagine you want to get superusers responding to more questions and your strategy to achieve that is making them feel like VIPs within the community.

You might decide to create a private group for the top 3 to 5 members. This seems simple enough. Simply start a group on your site and invite a few people to join. Boom, job done right?

Wrong!

Creating a group is easy, but creating an incredibly successful group is a little more complex. Think about every step along the way. What would this look like at a world-class level? You might first take the time to build a relationship with each person first. You can schedule calls, send them messages, ask for their advice, and understand precisely what they need. This might take a few weeks.

Once this has been achieved, you might then send out an invite which is friendly, directly references these previous interactions. You might identify why you are eager to have them join a private group and why you think they will benefit. You can make direct, personal, introductions between every member. Once this group is running, you need to drive it like a racecar!

This means initiating and sustaining activity. You might ask members for their opinions on community decisions, offer training on your products, and let them put themselves forward to run or lead areas of the community. You might constantly lobby for them in the community.

Now you can see how to execute this tactic at a world-class level takes a lot more time and resources. Fortunately, we’ve gained the time to do this by reducing the number of tactics down to just a core few.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **TARGET AUDIENCE** | MOST ACTIVE MEMBERS | | | | |
| **DESIRED BEHAVIOR CHANGE** | Increase the number of questions answered by the community. | | | | |
| **DESCRIPTION** | Create a private group for top members to feel like VIPs and more motivated to participate in the community. | | | | |
| **STEPS** | Build relationships with top 3 to 5 relationships and invite them to join the community. | Create a private WhatsApp group for staff and our top 3 to 5 community members to provide them with direct access to. | Link to unanswered questions in the group so members can provide an answer. | Share exclusive news first in the private group.  (requires getting internal approval first) | Initiate regular discussions soliciting and responding to advice and opinions from top members on the community. |
| **TIME** | 3 hours  (weeky) | 1 hour | 1 hour  (weekly) | 2 hours  (weekly) | 3 hours  (weekly) |
| **FINANCIAL** | $0 | $0 | $0 | $0 | $0 |

## 4.2 Resources and Budgeting

It’s easy to brainstorm a list of all the things you want to do, but that’s not strategy, that’s wishful thinking. Strategy is recognising your resources are limited and deploying those resources to achieve the biggest possible impact. For each phase of your strategy, list the time and budget required. Distinguish between those which are ‘one off’ activities and those which are going. You can see an example below:

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **PHASE ONE: 12 WEEKS** | **COST** | | **TIME** | |
| **Tactic** | **Weekly** | **One-Time** | **Weekly** | **One-time** |
| Position the community as a prominent navigation tab on our homepage. |  |  |  | 5.00 |
| Create an onboarding series of emails to make newcomers feel confident and safe to ask questions within the community. |  | $2500 |  | 25.00 |
| Move the contact us areas to the bottom of the pages and show questions in the community. |  |  |  | 2.00 |
| Turn our community into the primary support page with typical support questions featured later. |  |  |  | 15.00 |
| Build relationships with top 3 to 5 relationships and invite them to join a private group. |  |  | 1.00 | 4.00 |
| Link to unanswered questions in the group so members can provide an answer. |  |  | 1.00 |  |
| Share exclusive news first in the private group.  (requires getting internal approval first) |  |  | 2.00 |  |
| Initiate regular discussions soliciting and responding to advice and opinions from top members on the community. |  |  | 3.00 |  |
| Provide VIP experience at our annual conference. |  | $6500 |  | 25.00 |
| Design the community to show the average time to respond and the number of responses which receive an answer and try to reduce that time each month. |  | $3000 |  | 8.00 |
| Respond to any unanswered questions within 24 hours and escalate if needed. |  |  | 10.00 |  |
| Host a workshop series encouraging colleagues to engage in the community to prevent more questions later. |  |  |  | 8.00 |
| Embed related questions in the ‘contact us’ form from the community which members may wish to try first. |  |  |  | 3.00 |
| Run a challenge every 3 months to solicit feedback and ideas on a particular topic. |  |  |  | 4.00 |
| Top ideas are added to a shortlist and members can vote on the ones they like best (and add their expertise and refinement to the idea). |  |  |  | 4.00 |
| SUMMARY |  | $12,000 | 17.00 | 103.00 |

This is a good summary, but it excludes the technology and staffing costs. To estimate staffing, we first need to average our one-time hours over the space of 12 weeks and add it to the repetitive weekly activities.

This comes to 25.6 hours per week[[3]](#footnote-2). If we consider a community manager is likely to be called into other meetings and have the occasional holiday, we can assume this project needs a single community manager at this stage.

Let’s estimate a community manager costs $75k per year. We can add this to an estimated platform cost (let’s say, $85k per year) to get the full figure.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| SUMMARY | ($1,000) | $12,000 | 17.00 | 103.00 |
| Staffing 1 x FT employee  (for 12 weeks of 52 weeks) | ($1,442) | $17,308 |  |  |
| Platform License  (for 12 of 52 weeks) | ($1,636) | $19,615 |  |  |
| WEEKLY COSTS | $4078 |  | 25.58 |  |
| TOTAL COST |  | $36,935 |  | 307 hours |

Now you have a fully budgeted community program. You know roughly how much the community will cost and what skills and resources are needed to achieve. Perhaps more importantly, once you have a budget, you can make requests for more staff based upon the extra activities that will allow you to do. Being able to properly budget your community is a tremendous skill to have.

**Note: WARNING - Many community costs are front-loaded**.

If you’re planning to launch a new community on an enterprise platform, be aware that many of the costs are ‘front-loaded’. This means you are likely to incur a significant cost at the beginning to get the community up and running. This will make the community seem more costly than it is. It might be best to amortise (or average) these costs over the duration of the entire strategy. You can see we have done this in our example budget.

# 5.0 NEAR-TERM STRATEGIC PLAN: 3 TO 9 MONTHS

Once you know how to complete one phase, completing the remaining phases isn’t too difficult. You simply replicate the same process for each phase. Next you can do the short (3 to 9 months), intermediate (9 to 18 months), and long-term community roadmap (18 to 36 months).

As your community grows, the benefits of the community should become increasingly apparent. Therefore, you should anticipate being able to invest more resources in the community. I typically assume an increase in resources in the region of 15% to 25% for each phase (or per year). Over time, you can use these resources to satisfy more of the goals identified by stakeholders above.

At this stage you may also begin growing a community team to work with you. Make sure you include what the community team structure might look like, the skills of each team, and what each person will be responsible for. Once you begin to build a community team, you should also include what a team structure looks like and the skills they will need.



There are plenty of tools you can use to put together your team structure. My preference is to use Lucidchart which has a handy add-on if you’re developing your strategy in Google Docs.

**Note: Don’t reinvent the wheel.**

Before you introduce new tactics at each phase of the strategy, be aware you will probably get the most mileage from investing more and expand tactics which are already working.

For example, if your superuser program is going well, invite more people to join it. If newcomers are engaging in the community, then optimise the newcomer journey a little better or create different journeys for each segment of newcomers. Sure, sometimes you need to introduce entirely new tactics to achieve your goals. Most of the time, however, it’s best to expand upon what you’re already doing.

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# 6.0 INTERMEDIATE STRATEGIC PLAN: 9 TO 18 MONTHS

Now you can drop in your longer-term plans in the same format as listed above. At this point you should assume you have 30% to 60% more resources than what you did at the beginning. If you are looking to move platforms, this might appear in the intermediate term rather than the near term.

Sometimes projects such as a big technology platform migration might take a lot longer than 9 months. In these cases a tactic might be mentioned in several phases of the plan. Make sure recruitment is listed as a tactic with a clear list of the relevant skills and resources required. If you’re working for a large organisation, you should also spend considerable time in this phase building and sustaining internal support.

Remember, use the same structure as in phase one and update your tactics as necessary.

# 7.0 LONG-TERM STRATEGIC PLAN: MONTHS 18 - 36

Now it’s time to think about the big vision for the long-term. What will this community look like in 3 years’ time? What is your community at its full potential? After 3 years you might also assume your resources for the community have increased by 100% to 300% and things are beginning to develop quite quickly.

Try and tackle as many of your goals as you have the resources for. Consider what the community team might look like, what kind of skills you need to recruit for, and what kind of systems you will need to put in place to make this vision a reality. Consider the technology implications too. If you have a big technology change in mind, it’s best to start seeing the idea and scoping it out over a year in advance.

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# 8.0 TECHNOLOGY REQUIREMENTS

Writing up the technology requirements isn’t the most fun part of the strategy, but it's important to do it well. A failure to write good technology specifications can cause innumerable problems later on. Taking the extra time to do this well here will pay off many times over.

If you’re launching a new community from scratch, remember to identify who in your organisation (if you’re working for one) needs to be included and bring them along the journey.

List the category of platform you’re using (and why), create your membership projection, and use the objectives you’ve listed at each phase of your strategy to create your use cases. You should list your technology needs for each phase of the strategy. And remember, each use case should be converted into a specific platform requirement.

Finally, identify the design priorities. Which features and calls to action should be prioritised within the community? These should be the ones which best support your goals. You don’t need to develop the entire web specification at this point (that’s a separate strand of work), but you do need to have broad agreement about the look and functionality for the community you’re creating.

# 9.0 MEASUREMENT AND IMPROVEMENT

Great, you’ve created your strategy! But how are you going to know if it’s working?

The next step is to build your measurement framework.

Online communities hoover up a colossal amount of data. You can track almost every click and action in your community. It’s easy to become lost in the sea of data flowing through your fingertips. Should you measure how much time members spend on your community? How many visitors register? Or the demographics of participants?

Don’t gather copious amounts of data just because you can. Look back at your strategic plan and decide which metrics best reflect if the plan is working. If you’ve done the strategy well, this shouldn’t be too difficult. You should have already set your targets.

Here is an example:

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  |  | **MONTH** | | | | | | | | |
|  |  | **PHASE ONE** | | | **PHASE TWO (etc..)** | | | | | |
| **GOALS** | **TYPE** | **1** | **2** | **3** | **4** | **5** | **6** | **7** | **8** | **9** |
| **Goal 1:**  Resolve 25% of customer queries resolved by the community. | **Target** | 10% | 13% | 15% | 18% | 24% | 28% | 34% | 40% | 45% |
| **Actual** |  |  |  |  |  |  |  |  |  |
| **Goal 2:**  Increase in customer satisfaction score of community members by 15% | **Target** | 10% | 13% | 15% | 18% | 24% | 28% | 34% | 40% | 45% |
| **Actual** |  |  |  |  |  |  |  |  |  |
| **Goal 3:**  Gather 5 customer insights gathered and validated by the product development team. | **Target** | 0 | 0 | 0 | 0 | 0 | 2 | 0 | 2 | 0 |
| **Actual** |  |  |  |  |  |  |  |  |  |
| **Objective 1**  Get 500. newcomers to ask questions in the community. | **Target** | 10 | 20 | 30 | 40 | 50 | 60 | 70 | 80 | 90 |
| **Actual** |  |  |  |  |  |  |  |  |  |
| **Objective 2**  Get superusers to answer 50% of questions in the community. | **Target** | 0% | 20% | 25% | 30% | 35% | 40% | 45% | 48% | 50% |
| **Actual** |  |  |  |  |  |  |  |  |  |
| **Objective 3**  Ensure 80% of questions receive a solution within 24 hours. | **Target** | 50% | 55% | 60% | 65% | 70% | 73% | 77% | 80% | 85% |
| **Actual** |  |  |  |  |  |  |  |  |  |
| **Objective 4**  Get superusers to submit 50+ product ideas. | **Target** | 0 | 0 | 0 | 10 | 15 | 0 | 0 | 10 | 15 |
| **Actual** |  |  |  |  |  |  |  |  |  |

Notice now we’re only measuring the things that reflect whether our strategy is succeeding or not. We’re being clear what the targets are before we begin and we’ll notice very early on if we’re falling above or below this line.

How you gather the data and calculate each metric will vary by the platform, but the precise metric you’re using should be consistent regardless of the platform you’re using.

**Note: But what about engagement metrics?**

In my book, The Indispensable Community, I noted that most people measure the level of engagement not because it’s the best metric, but simply because it’s the easiest thing to measure. The best use of engagement metrics (outside of those within your strategy) are when something isn’t going wrong.

For example, if you’re not hitting your target engagement metrics can help you find out why. You will usually find the tactics you’re executing aren’t reaching enough people, aren’t having the desired impact, or the impact does last for long enough. This can help you refine or replace the tactics you’re using

# 10.0 MITIGATING RISK FACTORS

In this section you should identify and mitigate the risks involved in launching a community. Remember to assign a person responsible to each responsibility.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Harm** | **Likely** | **Impact** | **Mitigation** | **Owner**  **(initials)** |
| Superusers deemed as employees. | Low | Medium | Covered in T&Cs. Superusers to be voluntary with minimum required behavior nor financial compensation. | TM |
| Lack of quality participation from community members | High | Severe | New member survey and interviews to identify key needs and trends. Determine why members aren’t participating. Narrow focus to a few core goals. | RM |
| Failure to provide quick responses to questions. | Medium | Medium | Identify and build better relationships with customer support / marketing / internal developers who are happy to jump in to provide questions which are more than 24 hours old. | RM |
| Release of sensitive information | Medium | Low | Immediate removal of post with a note to the member about the danger of sharing sensitive information. If happens too often, send a pop-up warning to all members. | SB |
| Community is flooded with angry posts / upset customers. | Medium | Medium | RM to contact Dir. marketing for an official response on major issues. Deliver with empathy and invite customers to join a call to address their concerns. | RM |
| Community is flooded with spam / self-promotion. | Medium | Low | If exceeds 15 posts per day for 2 weeks, GB to set the community to pre-approved accounts for public users. | SB |
| Serious breach of code of conduct (sexism, racism, etc.) | Medium | Severe | Immediately removal of the member and outreach to the victim. A notification to the community that this behavior is not acceptable. | SM |
| Staff posting information they shouldn’t. | Medium | Medium | Work with HR to include community participation guidelines on staff training materials. Create a separate deck and host a workshop for staff to attend before they are allowed to post. | RM |
| Losing support from senior executives | Medium | Severe | Stakeholder mapping and engagement process. Schedule meetings with new arrivals and develop executive materials to explain community value. Regular value of community meetings. | RM |

This section of the strategy is a great place to address the concerns stakeholders have raised and assure them you’re taking it seriously. You’re far more likely to get the support of your colleagues if you first take the time to truly understand their concerns and ensure you have a plan to resolve them.

# 11.0 APPENDICES

Finally you can add in your appendices which contains the research, background information, any important models or philosophy and further reading. This shouldn’t be a data-dump to prove how hard you’ve been working. It should be a carefully curated set of supporting information to answer most of the likely questions that might be raised.

1. <https://www.mindtools.com/pages/article/newTMC_09.htm> [↑](#footnote-ref-0)
2. <https://en.wikipedia.org/wiki/OKR> [↑](#footnote-ref-1)
3. 103 hours / 12 weeks + 17 one-time hours [↑](#footnote-ref-2)