



# An Essential Guide to Building an Online Community



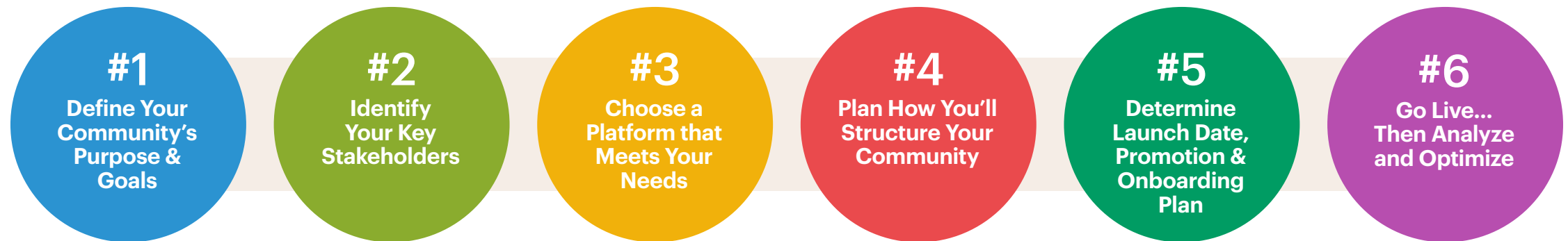
Over the past year, we've seen a significant rise in the number of online communities and the ways that organizations are using them to connect with people.

If you have seen the 1989 classic, *Field of Dreams*, you'll recall that Ray Kinsella said, "If you build it, they will come."

**What do baseball fields and online communities have in common? Both require a thoughtful and strategic approach.**



We've put together a list of essential steps that will enable your team to drive growth, foster collaboration and ensure that your community helps you achieve your organization's goals, including:



But, before we dive in, let's revisit the definition of an online community and why it's a valuable engagement tool for associations and nonprofits.

# What an Online Community is and Why You Need One

An online community is a digital platform for a group of people with a common interest, passion or goal to connect and communicate with one another. You use an online community to connect like-minded individuals or people who have similar experiences. You are likely already part of one or more online communities such as a LinkedIn group for your profession or a Nextdoor group for your neighborhood. Your community helps you meet people like you, keeps you informed and involves you in important issues or activities.

Online communities can be focused on hosting discussions and meetings, providing support, inspiring action or a combination of these. They can also be focused on providing year-round support and engagement for annual conferences and events. They can help keep the conversation going among attendees, speakers and exhibitors/sponsors long after the event takes places.

You may have a community set up through a social media platform and, while they can help you engage with people, a private, branded community offers these unique benefits:



44%

said it was more important to have an online member community in 2020.

## Increased control and security

If you create an online community on a social media site or another open-source platform, it's important to understand that your community is subject to any and all of the changes that the social media implements with little say or input on your end.

Additionally, your ability to control the way that users' data and information is used—as well as your own—is fairly limited. This has become an increasing concern for many organizations given the data hacks on social platforms, like the 2018 hack of Facebook data where nearly 50 million users' personal information was exposed<sup>1</sup>. When you create a private, branded member community, privacy and security are a top priority and you'll have increased control over how much information to collect from users and where it will be used.

## Better Access to Data

With a private, branded online community, you can have full access to engagement data from your community, which you can combine with Google Analytics and your organization's internal data to have a full view of your members, volunteers and/or donors. You can use it to track progress towards your goals and understand the specific contributions of your online community. If your community is hosted on a social media platform, you'll have limited access to engagement data and be unable to pull reports or leverage metrics to see how your community helps meets your organization's goals.

## More Robust Engagement Tools

A private, branded online community allows you to set up forums, discussions and groups tailored to specific topics or needs within your

organization. You can gamify the experience with badges, leaderboards and contests to increase engagement and reward your most active contributors. You can also crowdsource user-generated content and host meetings and events with live chat and embedded videos.

## Why You Need One

In Personify's latest research<sup>2</sup>, 44 percent of member respondents told us that it became more important to have an online member community in 2020 than in previous years. But surprisingly, less than 20 percent of association staff report using this channel while more than a third of member respondents told us that they would like to engage with their association using one.

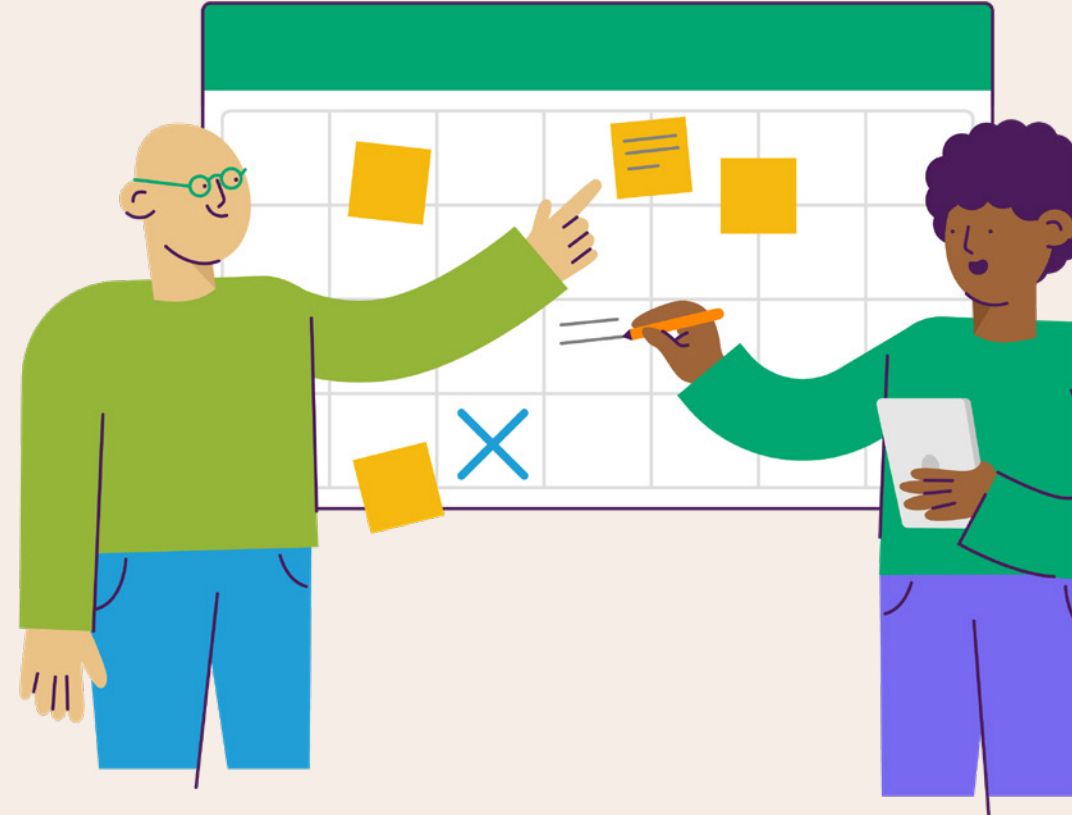
If you don't have an online community yet but you're ready to get started, here's our step-by-step guide that will ensure your association or nonprofit is set up for success.





# #1: Define Your Community's Purpose and Goals

Once you've decided that an online community makes sense for your organization, you will likely receive questions from colleagues and the leadership team on what the goals of the community are and how it's different from your organization's other channels such as your website, social media channels and more. In fact, your leadership team may ask why you cannot use a free tool such as a Facebook group to accomplish the same goals as the community platform that you want to use. You will need to articulate why it's necessary to have a private, branded dedicated space for your users and how the community will meet your goals, whether they are maximizing engagement, driving members to take action, increasing brand loyalty to your organization, or saving your staff valuable time.



To be successful, your community's goals need to directly support the overall goals of your organization, and you should be able to define how you'll measure success of the community. No two communities are the same and your goals should be unique to your organization. You may be building your online community for all members, volunteers and/or donors, or you may be setting up a community that is specific to one program or initiative within your organization.

For example, the National Association of Secondary School Principals<sup>3</sup> has a community that is focused on supporting and engaging advisors for its National Honor Society program for school inductions, activities within their chapters and projects that students are involved in. As a contrast, The Society of Hospital Medicine<sup>4</sup> has an online community for all of their members, but they create interest groups and forums that are unique to their different membership types.



# #2: Identify Your Key Stakeholders

When you are in the initial phases of building an online community, it's helpful to consider the various groups that will need to be part of the discussion about what the community should do and how it should be structured. These may vary by organization but typically consist of:

## Community Managers

These are the folks that will be approving new users, monitoring discussion boards, setting up events and making sure that users have everything they need to join and participate in the community. This may be a dedicated role within your organization, or it may be spread across a few key staff members with responsibilities that are aligned with the overall goals of the community.

## Teams Involved with the Community

Beyond the people that will manage the community directly, include teams and departments that will be impacted by the community and will promote, engage or analyze the community. For example, make sure to include your marketing colleagues who will help drive members to join the community in your weekly newsletter or through other digital channels. If you will use the community to continue the conversation among attendees of your annual conference, ensure your events team is able to provide input on the community. And include your IT team to pull engagement data from the community into your AMS or CRM platform to have a full picture of your membership.

## Leadership

Don't forget about your leadership team. Obtaining buy-in from your organization's leaders is not only helpful to ensuring that you get approval to move forward with the community initiative as a whole, but that they're engaged from the start. According to a Community Roundtable report, in 58 percent<sup>5</sup> of the best-performing communities, the organization's CEO is an active participant.



# #3: Choose a Platform that Meets Your Needs

There are many options available when it comes to selecting a platform and building your online community. It's important to think about your user needs and community goals when evaluating software options.



If you're looking for more details on how to select the right Community vendor, check out our [Technology Buying Guide<sup>6</sup>](#).

## HERE ARE SOME QUESTIONS TO CONSIDER:



Will you need to create sub-groups within your organization for specific types of users to connect, learn and share with one another? If so, custom content permissions can help you tie specific information and actions with distinct groups of users.



Will your users share photos, videos and other types of multimedia?



How will you organize content that is shared within your community? Do you need a resource gallery to organize and tag different types of assets?



Do you want the ability to incentivize and reward those who are engaging often in the community? Badging, points-tracking and leaderboards can help cultivate super fans and reward them for sharing their knowledge in the community.



How will users be notified when content is published? Will they receive email alerts, and can users customize the type of alerts they receive?



How will members or volunteers sign into the community? Do you want to leverage a Single Sign On (SSO) so that users have the same credentials whether they're logging into your website, community or other platforms?



## #4: Plan How You'll Structure the Community

Once you've chosen a partner, you'll work together to align on how to structure the online community to meet your needs. There are many questions that your software vendor will ask to ensure that you are set up for success and they may include:

### **Public vs. Private**

When you're building your online community, you'll need to think about if anyone can join your community or if you want to restrict access to members only. The latter option provides a good incentive for members to see more value in joining (and remaining) a member of your organization. However, it may be beneficial for volunteer- or donor-based organizations to have a public community and reduce the barriers to join the community.



## How You'll Elicit Engagement

In the early days of your community, it will be important to guide members on how they can participate and engage. How will community managers elicit input and ensure visibility for your key programs and activities? You can leverage the newsfeed within your community to make sure that users see what's most important in the community. Your community managers should analyze engagement within the community and regularly make recommendations to optimize. But it's important to start with a thoughtful approach that is intuitive and easy to navigate by your users.

## Align on Team Responsibilities

Revisit your list of internal stakeholders from earlier in the process and make sure it is clear who will be responsible for approving new users, moderating discussion boards, helping users navigate the community and more. The community should not be a siloed activity that a specific team or department is responsible for but, rather, multiple teams—including your organization's leaders—should help cultivate and grow engagement within the community.

## Set up Gamification

Will you assign badges for different types of members, volunteers or donors? How will users accrue points for various activities and types of engagement?

# #5: Determine Launch Date, Promotion and Onboarding Plan

You've got the building blocks in place and are ready to bring your community out into the world! Here are some things to keep in mind as you are working towards the big day:

## Soft Launch

Consider hosting a soft launch with a group of members who are willing to provide input on and their initial experiences. They can help you look for bugs or other issues and their comments and likes will help generate content to make the community feel vibrant when all members are invited in and to have some experts help them along the way.



## Test Everything

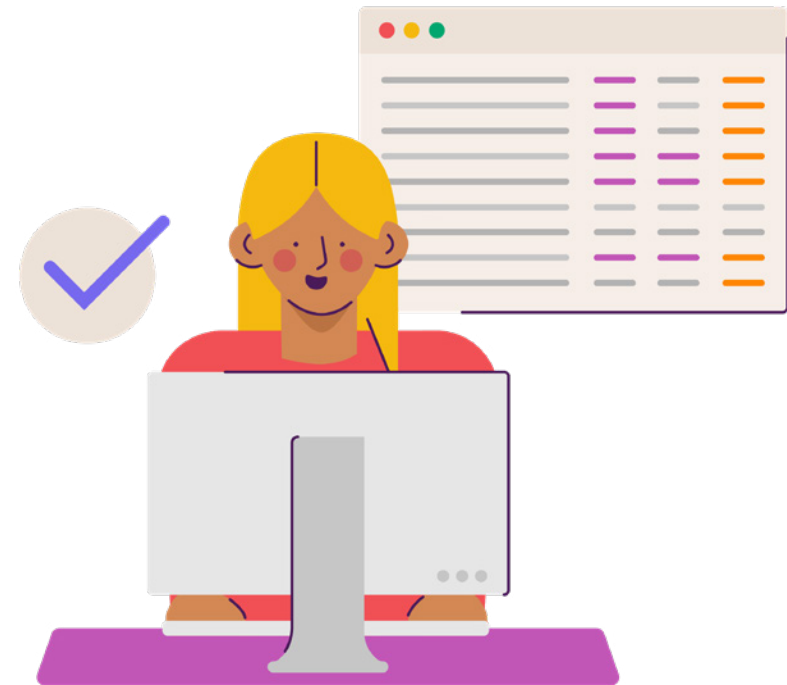
Testing is a crucial piece of your launch strategy and should include all of your internal stakeholders, making sure that their respective parts of the community are working correctly. You'll need to test things that are internal and external to the community, including how community alerts route to users and relevant spam controls.

## Promotion

It's great that your marketing and membership teams have been part of the discussion from day one, because you'll need their help to maximize visibility for the new community. Connect with those teams on what the full promotion plan will look like including dedicated emails, mentions within your newsletter, a featured section on your organization's website and more.

## Onboarding

Make sure to think about what the experience will be like for new users. While some of your members may know how to get active immediately, others may require some coaching on how to participate. With a platform like Personify Community, you can use onboarding tours to walk users through the process of getting the most out of your community with guided experiences.

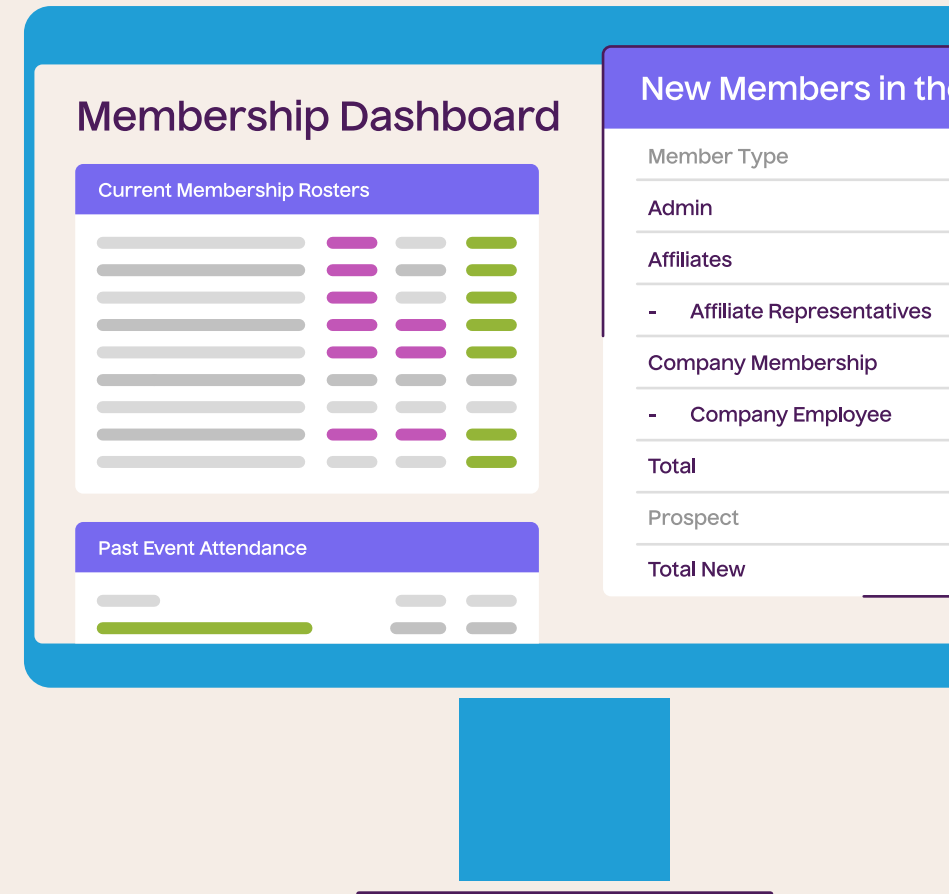


# #6: Go Live...then Analyze and Optimize

You've made it to the finish line and you're ready to welcome new users. After your new community goes live, there will of course be small things to tweak and fix as people start engaging in your community.

But it's important to set up regular check-ins to evaluate how your community is growing and helping you meet your goals. We encourage you to set quarterly review cycles with the group of key stakeholders to review engagement data and revisit the key performance indicators that you set up at the beginning. If you have a solid integration between your community and CRM or AMS platform, you can see how community engagement contributes to membership renewals, increased donations, or other organizational objectives.

These review sessions will help you identify and prioritize optimizations within the community to ensure that you're achieving the ROI to justify the investment of your community platform.







# Want to Learn More?

Launching an online community is no small task, but with the right platform, it can be easy and painless to get your community stood up and ready to go. Personify Community is a must-have for modern member-based organizations of any size that want to foster lasting member relationships, both with fellow members, as well as with the organization.

Our online community solution enables associations, chambers, and nonprofits to easily host a branded, dedicated site that extends your ability to deliver member value through the use of content, forums, badging, videos, and more.

Learn how you can reach more people, boost participation and increase the value of membership.

**LET'S TALK**



## About CommUnity by Personify:

Personify CommUnity allows your organization to host a dedicated online space for your members, volunteers, event attendees and stakeholders to communicate, learn, plan and grow.



## About MemberClicks by Personify:

Membership management software that help you grow membership, build an online community and increase non-dues revenue. Our membership software solutions are built to help solve the daily challenges of professional associations, trade associations and chambers.



## About ThreeSixty by Personify:

Our simple but powerful enterprise association management system comes with all the tools, analytics, and actionable insights you need to accelerate and amplify your mission.

## References

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# We're in the relationship-building business.

## ABOUT PERSONIFY

Looking for a committed, understanding partner to help you grow? Let us mix, match, and mold our Community Experience solutions to meet your emerging needs and help you create better relationships with your community. We love to listen, and there's nothing we find more gratifying than deepening the connections that drive your success. For more information, visit [personifycorp.com](https://personifycorp.com).

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