THE SOCIAL BUSINESS COOKBOOK

How to work with your stakeholders to boost your bottom line

By Rob Nash

4 ROADS

CONTENTS

PREFACE

THE 4 ROADS SOCIAL BUSINESS COOKBOOK HAS BEEN WRITTEN TO HELP BUSINESSES INTEGRATE SOCIAL AT THE CORE OF THEIR ACTIVITIES.

There are two big aspects to making social work in your organisation - getting the business culture and processes right, and the right technology to support them. This Cookbook covers both of these aspects.

As a leading supplier of social business solutions, 4 Roads has many years' experience with social tools and intelligent self-service technology, especially with Telligent implementations.

If you've enjoyed this book and would like to find out more, contact 4 Roads–you'll find our contact details at the back of this book. Whether you would like help planning your online community project or need assistance with selecting the right tools and utensils for the job, 4 Roads are well placed to advise you.

And we hope you will share the recipes you've found, so we can all go on exploring tastier and richer ways of cooking up a truly social business.

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Introduction

The Social Business Cookbook will help organisations understand how to create sustainable, profitable or purposeful social activity, matched to the needs of any business and those of the audience it wants to reach.

In recent years many organisations have invested heavily in social engagement with their staff or their customers on private or 'owned' community platforms, but many of these experiments have failed expensively.

As a result, the 'social' part of business has often become limited to marketing activity using public social media platforms, such as Facebook, Twitter or Instagram.

Success in creating a rich and valuable social space depends on a lot more than choosing a technical partner and implementing the latest widgets. It requires a new way of thinking about both your audience and about yourself as a business.

We have many years' experience working with a range of for-profit and non-profit organisations across many sectors in planning how to implement social tools in a way best suited to their specific needs.

This Social Business Cookbook uses this experience to present a way of thinking about becoming a social business. It sets out:

- The ingredients and recipes – to help you devise your own blueprint for your social business path over the next year or two.
- The methods – to identify the key business strategies that map to your audience's motivations.
- The tools – matched to the ingredients and methods you have selected.
- The proof of the pudding, outcomes with relevant ROI.

What is a social Business?

Your social presence is – or should be – a complex menu of offerings to the audience. It is also layered like an onion. An onion is the first ingredient you pick up for many recipes – and that's as true in making a social space as it is in making a good curry.

The outermost layers are the external social media spaces, wherever people may be discussing the topics your brand addresses. You aren't in control of those spaces, but you can monitor the conversations, and participate in them. If you don't, you may soon become irrelevant to your potential audience. If you participate actively in this space, you can hope to attract some of that audience to engage more deeply with you in places where your brand is more prominent and you are more in control of the conversation.

Next layer down are the spaces you brand and manage within those social media platforms; your brand's Facebook page, your LinkedIn group or Twitter feed. These are places you are in control of the conversation and can use to spread your message, and where new prospects can easily find you. It's also where you can recruit brand advocates and provide initial engagement.

But it's hard to get close to your audience here, and you don't control or own the data.

Beneath this layer are spaces you can own – create, manage, control access, and link to your customer relationship management tools. First is the customer community, a secure place where you can talk with your customers and prospects, and offer them a range of relevant content, products and messages to support the conversations. Next is an extranet or supplier/partner community, probably a

private space for developing your offerings and strengthening key relationships.

Few organisations have truly effective platforms for internal communication

Finally, at the heart of the onion, is your own internal community. This is the place where you and your employees communicate within the enterprise. Unlike the layers above, which may be 'new,' every organisation naturally has some kind of channels for internal communication and places for storing and retrieving data and information – without them it would be impossible to function. Yet few organisations have truly effective platforms for internal communication even though these are particularly valuable if they want and expect to be using 'social tools' to engage with their audiences.

Of course, when you are planning your social engagement strategies, you don't want to bite off more than you can chew. And if your business imperative is to build a customer community, you do not want to wait while you persuade the rest of the business to learn to participate in an internal community first. You can't work on every layer at once from the outset.

EVEN IF YOU START SMALL, THINK HOLISTICALLY

But even if you start small, with your managed social media, or your customer communities, think holistically. The most effective social businesses allow each layer to flavour the others.

And because an organisation's internal communications lies at the heart of the onion, they affect everything else the business is trying to achieve.

Takeaway tips:
- A social business is active in as many layers as possible.
- A social business has an integrated presence in different layers, to give its audience a unified experience of your business.
- A social business does not let marketing dominate every layer – all audience-facing staff must get involved.

PARTICIPATING	MANAGED	OWNED
Listening, establishing reputation (I'm one of you)	Listening, supporting, building repuation, marketing	Listening, supporting, building relationships, collaborating
Social Media	Mangaed Social Media	Your Community

NETWORKS AND COMMUNITY

If we asked if your brand was active on social media, you'd probably snap back with a "Yes!" If we asked if you were seeing the results expected, we're not convinced you'd confidently snap back with another "Yes!"

For many brands, their social media efforts are not providing the results they were hoping for. Reach and engagement has been slashed and many brands are realising that social media isn't the place to build valuable, long lasting relationships with their audience.

When we mention the words 'online community', it's common for people—and even high level marketers—to respond with "Oh, like Facebook groups?"

For this reason, let's clarify matters and make a distinction between online communities and social networks. This is especially important for brands to understand these differences, as the objectives and strategies you use for both should be very different.

Social networks are not online communities.

However, social networks and communities do work together and share some common ground:

- They both exist online
- They both are places where people discover content and other people
- They both fall within the blurry lines that define social business platforms.

SOCIAL NETWORKS

This is the world of the individual and information. Social networks (such as Facebook) encourage connections, interactions and interpersonal relationships between people. These people also want individual relationships with your brand and want you to listen to them and answer their questions.

For brands, social network is a broadcast tool but with the added benefit of having relationship validation.

ONLINE COMMUNITIES

Online communities are a group of people with a common purpose. They focus on bringing people together around a common interest, cause, industry profession or even product.

And savvy organisations are acknowledging that audiences connected by this purpose maintain an ongoing dialogue that ensures your brand stays front of mind.

Members of an online community can stay just as connected as they can in a social network. However, in online communities, that action happens in groups rather than on individual walls.

WHAT STEPS ARE YOU TAKING TO ENHANCE YOUR CUSTOMER RELATIONSHIPS ONLINE?

The difference is that the focus is not on individual profiles. It is on group discussions, file-sharing, and collaboration over products and issues.

THE TASTIER OPTION?

There are both similarities and differences between social networks and online communities and this remains a huge area of discussion. However, one thing is clear; if you are trying to bring customers or members together in support of a product, rally around a cause or take a collective action, an online community is the superior delivery vehicle.

We are not saying a social network presence isn't valuable. Facebook and LinkedIn are extremely worthwhile 'pay-to-play' networks for targeted and personalised reach. However, they are no longer reliable as the foundation for customer conversations, or as a complete solution for supporting customer questions.

BOTH SOCIAL MEIDA AND AN ONLINE BRANDED COMMU-NITY SHOULD BE IN YOUR SOCIAL TOOLBOX

Takeaway tips:

- Many technology suppliers provide tools for both networking and community on a single platform.
- A community needs more proactive planning and management but the returns are easier to identify.
- This cookbook will help you decide which approach is right for your business, but focuses on community building which is more appropriate for most forms of owned social platform.

SOCIAL BUSINESSES AND INTERNAL COMMUNICATIONS

Until the advent of social communication tools, it was virtually impossible for a large business to have a genuinely collaborative culture.

Even small enterprises like restaurants need a reliable system of communications between the staff – to get the right meals ordered, prepared and served to the right customer at the right time. Many rely on orders handwritten by the waiters, or even shouted across to the chefs.

Large and complex organisations, with staff distributed across many sites or even countries, need something more. In recent years the universal communication tool has been email.

As one of the first online social tools, email is great for instant person-to-person communication and it's great for one-to-many distribution of information. What it's not great for is many-to-many communication. Yet we've all tried to use it for collaboration, the very thing it's not good at.

We copy more and more people into our messages, circulate multiple versions of evolving documents and eventually clog up each other's inboxes until it's impossible to unravel the urgent from the irrelevant. Worse, email invites each person to devise their own personal storage systems, so there's no real shared knowledge across the business.

This means the modern office is rarely as efficient as it looks (and in some ways it's less efficient than offices of old, which relied on typing pools and shared filing cabinets).

The phone rarely rings – everyone emails

Files stored on individual hard-drive, a shared archive or intranet

Paper storage is ad-hoc

Email inbox combines actionable & non-actionable messages

A Business that relies on email very commonly finds it difficult to share knowledge effectively

The reason for this is that true knowledge, as opposed to data or information, is not kept in enterprise retrieval systems or intranets; it resides in the brains and memories of the people who work there.

And too often, when a problem reoccurs, no-one knows that someone, somewhere, has already solved it on a previous occasion. They don't know whom to ask, and email is unlikely to help them find out.

True knowledge is costly. It is bought by training, by experience and experiment, and often by expensive failures. Yet few businesses fully value the knowledge they have bought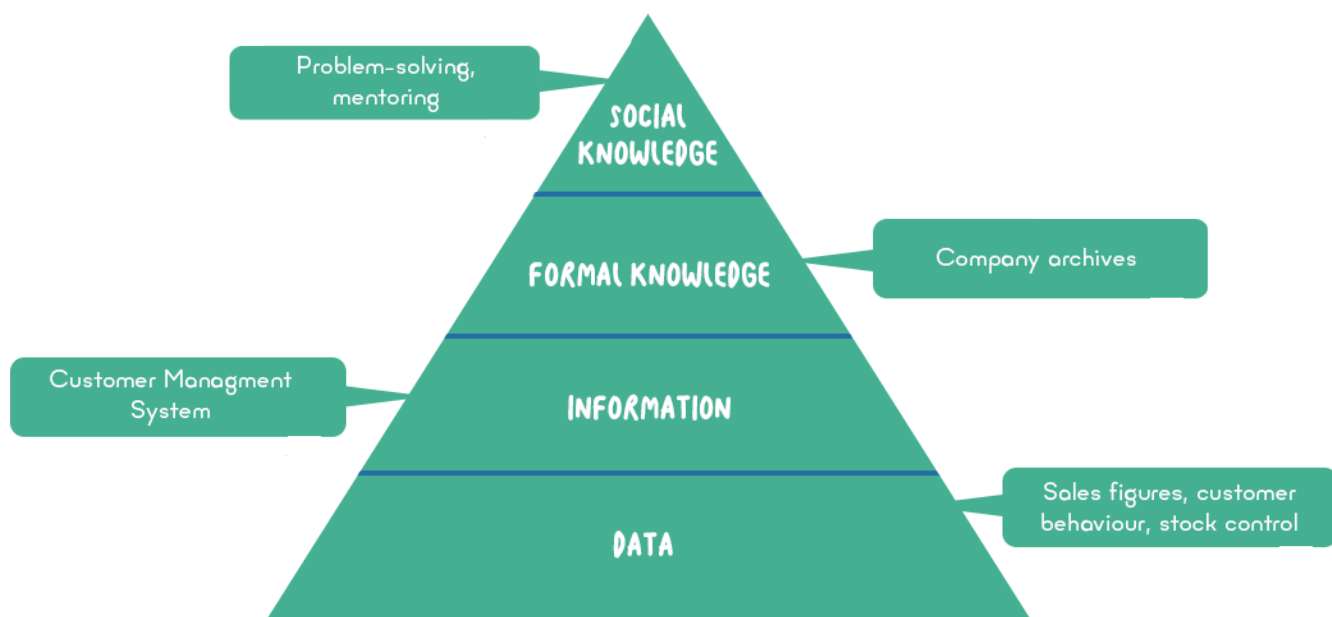. They rarely audit it to discover its range, depth, currency and omissions, and they let the most knowledgeable staff leave without any way of tapping into their knowledge for the future.

True knowledge is social knowledge. And a 21st-century business needs to have access to it, since ideas are so crucial. To survive in the digital world, it needs to be a knowledge organisation.

More recent social tools, unlike email, are designed for many-to-many communication, and for two-way communication between people at every level.

They provide the functionality for collaboration and finding answers across huge organisations, and can and should be the answer for gaining access to social knowledge.

Most businesses consider social network to be as essential as email and telephones. But many struggle to make effective use of them. They become yet another tool, adding to the confusion.

Problem-solving, mentoring

SOCIAL KNOWLEDGE

Company archives

FORMAL KNOWLEDGE

Customer Managment System

INFORMATION

Sales figures, customer behaviour, stock control

DATA

The explanation for this failure lies not in the tools, but in the communication culture.

A siloed organisation with multiple communications channels, disconnected tools and no common language can never be a truly social business.

Too many siloed channels   *Too many siloed departments*

CUSTOMER SERVICE   RESEARCH   PRODUCTION   SERVICES   MARKETING
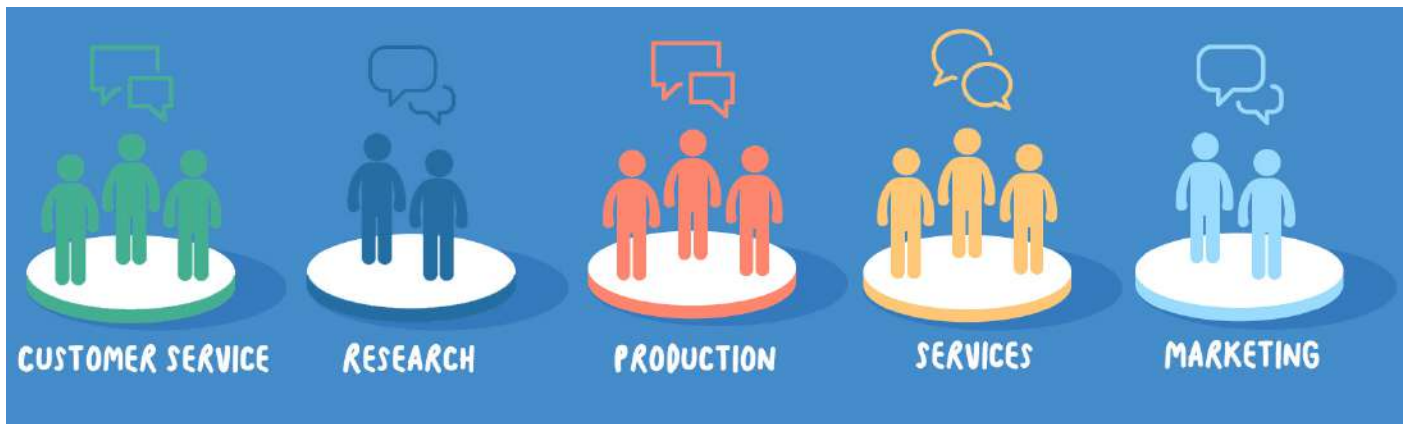
Tools are disconnected   No common goals   No common language

Takeaway tips:

- A social business is a social knowledge business.
- Social knowledge means using social forms of communication.
- Social communication means moving beyond broadcast and allowing genuine two-way exchanges between people at every level.
- Social tools not only allow management to communicate **what** they are planning to do and **why** they are planning to do it; crucially they also invite the rest of the staff to explore, together, **how** they understand these plans will be worked out across the business.

WHAT
THEY ARE PLANNING TO DO

WHY
THEY ARE PLANNING TO DO IT

HOW
THEY UNDERSTAND THESE PLANS WILL BE WORKED OUT

YOUR BUSINESS CULTURE

Your business culture – the attitude the management takes towards its staff – can be measured on a gauge on a pressure cooker.

Why a pressure gauge?

Because a business culture is led by the senior management, and a management with low expectations and low involvement is putting little pressure on itself, whereas one that seeks to collaborate with and empower its staff is under a lot of pressure to facilitate change.

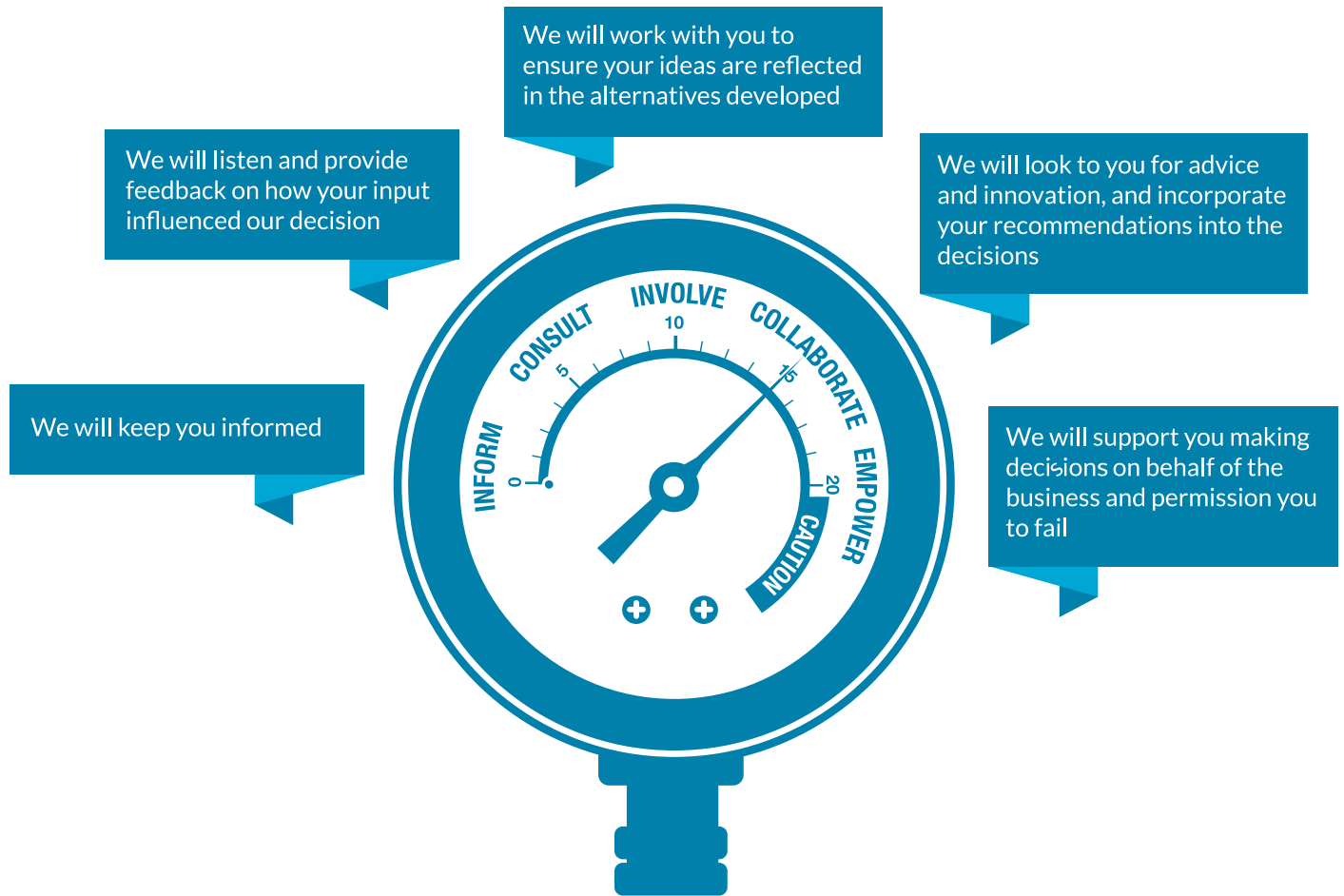## BUSINESS CULTURE IS LED BY THE SENIOR MANAGEMENT

The main points on the gauge, from low to high, run as follows:

- **Inform** culture–we, the management, will keep you, the staff, informed of what we are doing.
- **Consult** culture–we will listen and provide feedback on how your input influenced our decisions.
- **Involve** culture–we will work with you to ensure your ideas are reflected in the alternatives we develop.
- **Collaborate** culture–we will look to you for advice and innovation, and incorporate your recommendations into the decisions.
- **Empower** culture –we will support you in making decisions on behalf of the business and give you permission to fail.

As the pressure increases, so do the risks. It's no surprise that aspiring to be an Empower culture should be approached with caution if management is used to managing in a non-collaborative way, and changes required to reach empowerment could seem threatening. This is why many established businesses may talk about empowering their staff, but find it difficult to fully realise the vision in practice. Businesses that have started within the past five years usually don't see collaboration or even empowerment as an issue, but more a competitive advantage.

Most of us, whether we are management or more junior, probably think we work best in a Collaborate or Empower culture. Some people even argue that the mere introduction of social tools in a business mean that collaboration and empowerment will happen. But it's not as simple as that, because the management, not the staff, sets the culture of the organisation. If the management doesn't want to engage staff in this degree of decision-making, the empowerment will be shallow.

We will work with you to ensure your ideas are reflected in the alternatives developed

We will listen and provide feedback on how your input influenced our decision

We will look to you for advice and innovation, and incorporate your recommendations into the decisions

We will keep you informed

INFORM CONSULT INVOLVE COLLABORATE EMPOWER

0 5 10 15 20

CAUTION

We will support you making decisions on behalf of the business and permission you to fail

In determining how effective you will be as a social business, you should make an honest assessment of where you are and where you could realistically get to, on the pressure gauge. And be aware that, if like the majority of businesses, you are stuck at the Inform or Consult end of the scale, the chances of your social initiatives succeeding will be a lot lower.

Of course, if you choose to cook at high pressure, you can prepare your dishes very quickly and with less energy than using conventional methods, and you'll keep more of the goodness and flavour. But it's not appropriate for every situation!

Takeaway tips

- Small businesses, where everyone knows everyone else, are much more likely to be successfully collaborative or empowering, than larger, more impersonal ones.
- In evaluating your culture, focus on how the difficult decisions are made, and how bad news is handled.
- If you want to work for cultural change in your organisation, you need a senior sponsor who is prepared to sell the message at board level.

THE CULTURE OF YOUR KITCHEN

All your decisions about cooking start with the way you have set up your kitchen.

People design and run their kitchens in different ways. A fast-food outlet kitchen is equipped, and the staff trained and managed, in a quite different manner from a Michelin-starred restaurant. Your kitchen at home is different again. Naturally, the way the kitchen is run has a direct bearing on the kind of dishes you can prepare.

So too with any business. The quality of your social initiatives will depend on the way the business is run, and on the management culture, particularly with regard to the way the business interacts with and motivates its staff. Your choice of kitchen equipment, staff and skills will also depend on understanding the market need. A Cordon Bleu restaurant is unlikely to succeed in a run-down neighbourhood and a fast-food outlet won't work in a small village.

Every management wants to maximise the sense of purpose in the business. Some do it by inviting the staff to find their own direction; others prefer the old-fashioned mix of carrot-and-stick.

Every management also wants to maximise profits. But if the profit motive becomes detached from the purpose motive, your service will soon suffer and the customers will notice.

THE QUALITY OF YOUR SOCIAL INITIATIVES WILL DEPEND ON THE MANAGEMENT CULTURE

PLANNING THE MENU

Getting the menu right is vital for any cook.

But planning the menu will depend on many factors:

1. The size, tastes, behaviours and budget of your target audience
2. Your own ambitions, commercially and creatively
3. Your culture
4. The set-up and resourcing of your kitchen
5. The available ingredients
6. Budgetary considerations

Much the same applies in planning your social space – you need to look both at the size and the needs of the audience, and the limitations and opportunities of your own situation.

Matching them all can produce tasty and rewarding results!

Ingredients

Every recipe begins with a list of ingredients. To make a salad, you need fresh vegetables. To make nachos, you need chillis. And so on.

If you don't have the right ingredients, you can't make the dish you want. That's obvious. And if you don't know the characteristics of the ingredients, your dish won't come out the way you hoped.

So what are the basic ingredients of a social business? You may think the answer is the platform, the widgets, the functionality. Or maybe the conversations, the blogs, the updates.

But the platform is just the tool you use, the conversations are the methods – baking, blending, reducing – that the recipes call for.

The basic ingredients are the people who will take part in your social activities. We call them your audience, though they're not like the audience in a concert since you don't want them to be silent and appreciative, so much as noisy and productive. Your audience may be your customers and prospects, your partners, or your staff, or even the wider public that you address.

Your planning has to start with them, with knowing and respecting what they want. Otherwise you will make the classic mistake of throwing a party that no-one will come to.

Cooking, though, usually means more than tossing raw materials into a dish and serving it up. It means putting things together to enhance the flavours of each. It means doing things to the raw stuff to make it more edible – maybe by boiling or baking.

THE BASIC INGREDIENTS ARE THE PEOPLE WHO WILL TAKE PART IN YOUR SOCIAL ACTIVITIES

If you have the right aspirations and knowledge of methods and ingredients, you can expect to make something new, different and exciting.

In planning your social business, you start with the motivations of your audience. You can – probably will – want to steer the audience towards objectives of your own, so you need to be clear what your own expectations are as well.

But there is one ingredient that must go into every community to ensure success—buy in from all parties. Imagine trying to cook a meal while other's are working on their own meal. The kitchen gets messy, ingredients used up and no one achieves a finished dish.

PRIMARY AUDIENCE MOTIVATION – THE BASIC INGREDIENT

When marketers think about their audience, they tend to think about segments and profiles. Is our audience mainly young or old? Male or female? Social group A1 or C3? Do they like watching TV or playing sport? Fast food or organic? That kind of thing.

Such questions are important, and will lead you to an understanding of the kind of person who you may be talking to, and of the language you need to use to appeal to them. They will also help you identify how big the audience potentially is. This naturally is vital because if your potential audience is numbered in hundreds, you will struggle to get the community off the ground at all (only one or two people in every hundred is likely to be active, at the best of times); whereas if the audience numbers in the millions or tens of millions, you need to make sure you have a robust platform and scalable operations. It's the equivalent of the market research you will do before launching your new restaurant.

But by itself, traditional market research won't be enough for you to create a social space that they'll flock to.

The internet is a large place, and chances are that someone, somewhere, has already created just such a space that your audience are already using. Yours has to be better than that, to get them to move across. A 'me-too' strategy may work in the high street, but it doesn't work online.

And being better than your competitors doesn't mean being slicker, or having more cool widgets. It means being more closely attuned to the things the audience wants to do, share or see. Being somewhere audience feel they get satisfaction or reward for interaction.

So, your recipe should always begin with the main ingredient – not just the audience, but the motivation of the audience.

There are, of course, an infinite number of possible motivations for why people do things – just as there are an infinite number of possible ingredients for your recipe.

But in cooking, ingredients net down into basic categories such as meat, vegetables, dairy, oils, spices, fruit; or protein, carbohydrates, fats, vitamins. So too with motivations.

YOUR RECIPE SHOULD ALWAYS BEGIN WITH THE MAIN INGREDIENT – AUDIENCE MOTIVATION
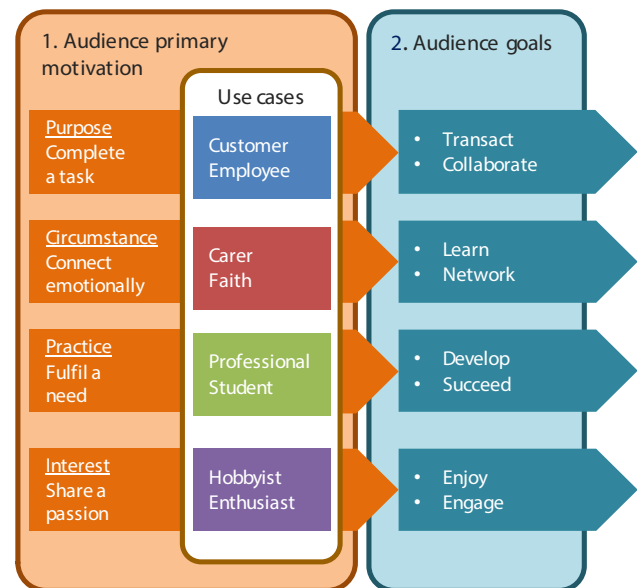
Audience motivations can be most usefully put into four main categories:

- I want to complete a task
- I want to connect with others emotionally
- I want to fulfil a need
- I want to indulge in a passion

People will come together, help one another, around each of these, and the vast majority of human interactions fall into one of them. For example:

Completing a task could be buying a product, resolving a support issue, or completing a project in a business. Whatever the task may be the person has a clear **purpose** in mind and after completion, they can move on.

Expressing an emotion may be seeking or offering support on a site for people suffering from a particular medical condition; or sharing another kind of powerful experience – for example the connection you have with alumni of the same school or college, or company. It may even be the excitement of attending an event. Whether it's temporary or permanent, the key thing that brings people together is the shared **circumstance**.

1. Audience primary motivation	Use cases	2. Audience goals
Purpose Complete a task	Customer Employee	• Transact • Collaborate
Circumstance Connect emotionally	Carer Faith	• Learn • Network
Practice Fulfil a need	Professional Student	• Develop • Succeed
Interest Share a passion	Hobbyist Enthusiast	• Enjoy • Engage

Fulfilling a need refers not so much to emotional needs as to practical ones, for instance, answers to questions or knowledge from others who have more experience. Professional organisations, set up to share knowledge and ensure practitioners have the necessary skills to perform well, are good examples. These are called communities of **practice**.

Indulging a passion is about exploring personal enthusiasms and sharing knowledge. This could be hobbies – photography, cars, cooking – or games and education. What brings people together here is their common **interest** in the subject. An interest may endure for a lifetime

These four sets of motivation are addressed by many businesses – traditional or 'social' – and can produce use cases that form the basis of community platforms.

For example:

PURPOSE

A social intranet within a business is primarily a community of purpose – a place that employees come to do their jobs better.

TASK

Another common community of purpose is a customer community – a place customers or prospects come to discuss the organisation's products, to find out how others are using them, to resolve issues, and to interact with the customer service team. Other examples of a community of purpose might be a community for job-seekers, or for exam candidates.

CIRCUMSTANCE

A typical community of circumstance is run by a medical charity for people suffering from a particular condition.

EMOTION

Community members may include carers and family members who come to share information and offer emotional support of a kind that cannot be found elsewhere. A quite different kind of community of circumstance may be built up around a specific event, like a conference, study-course or trip, allowing attendees to meet beforehand and continue their contact afterwards.

PRACTICE

The classic community of practice is a professional space in which practitioners come together to share knowledge and develop good professional practice.

NEED

The reason for taking part is the need to refresh skills.

INTEREST

A typical community of interest is a place to meet other people who share an interest, a passion, a hobby, a belief – anything that you like or love.

PASSION

It might be a fan club or sports club, where enthusiasts come to talk about their interests or learn from one another. Or gamers may come to test their skills and knowledge against one another.

Takeaway tips
- Start with your audience motivations, not your business ambitions.
- Think about your audience as individuals, not as segments.
- Being clear about the primary motivation of your audience will affect all the rest of your planning.
- Keep it simple – start with main motivation categories, explore the detailed use cases later.

RECIPES

A recipe made of just one ingredient will be dull. It might be adequate for refuelling, but no one will look forward to it, or return to it if alternatives are available.

The same applies to online communities. They aren't made up of a single ingredient – a single motivation – but out of a planned mix. Getting the mix of motivations right is your recipe for success.

People are complex social beings, when we meet face to face, we may have several motivations. I may need to stock up my fridge and so decide to go shopping; but my choice of store may depend on secondary factors, like my need to keep costs down, my desire to support small businesses in my neighbourhood, the fact I find a particular store assistant personable, or the convenience of combining this trip with other chores I have to complete.

My primary motivation is the **purpose** of restocking the fridge; but the secondary motivations – **circumstance** and **interest** – are crucial to my decision as to where I spend my money.

So, when you are looking at the motivations of your audience, and how to lure them away from other social spaces they are already using, think about them as rounded individuals with complex motivations.

Even if your own ambition for the site involves a simple purpose, to increase customer satisfaction, for example, or improve retention, you may have to think creatively about what else you can offer which the audience wants. Most successful social businesses address not just the primary audience motivation, but some secondary ones as well. This is most evident in those sites that treat their customers as key
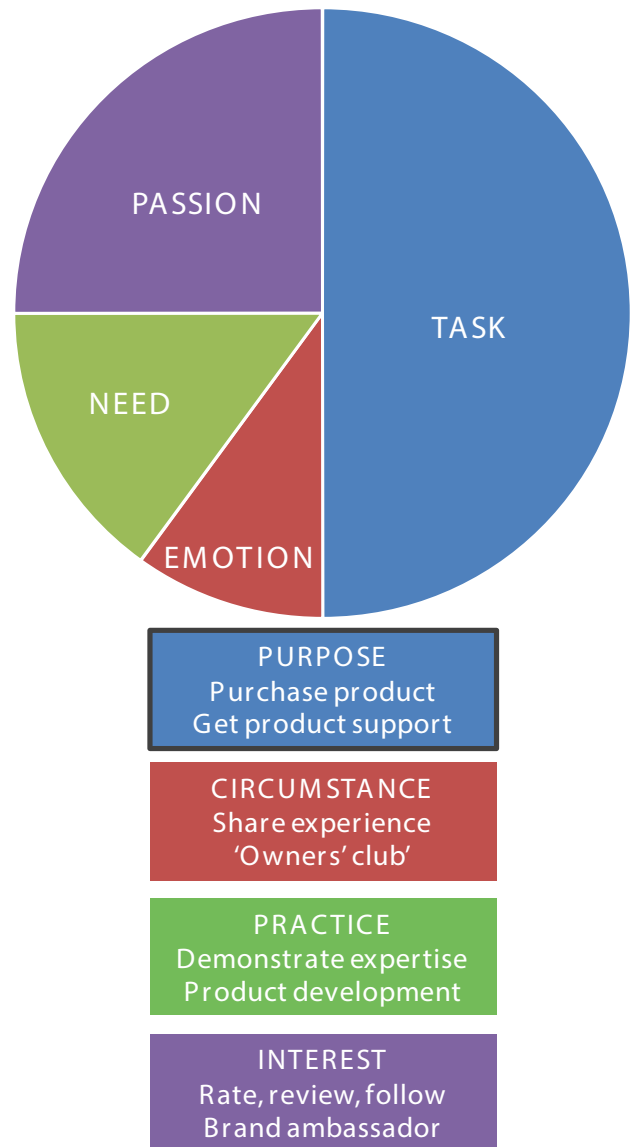
contributors to the business and its products, rather than just transactional units.

Takeaway tips
- Small businesses, where everyone knows everyone else, are much more likely to be successfully collaborative or empowering, than larger, more impersonal ones.
- In evaluating your culture, focus on how the difficult decisions are made, and how bad news is handled.
- If you want to work for cultural change in your organisation, you need a senior sponsor who is prepared to sell the message at board level.

MIXING PRIMARY AND SECONDARY MOTIVATIONS - YOUR RECIPE FOR SUCCESS

Here are some real life examples of online communities, demonstrating a different primary motivation but each succeeding because they offer a healthy mix of primary and secondary motivations .

RECIPE - CUSTOMER COMMUNITY OF PURPOSE

Olympus' consumer camera division uses the Telligent Community platform to host its popular community portal, MyOlympus.

With 364,000+ members, it has to serve different purposes for different members.

The Visionary program is where photographers from around the world upload their photographs (**purpose**). If Olympus likes what they see, they invite them to become an OLYMPUS Visionary. As a Visionary, you become a brand advocate and benefit from more exposure and exclusive perks.

As a secondary motivation, MyOlympus members can use the community support to organise repairs and get advice and technical support for
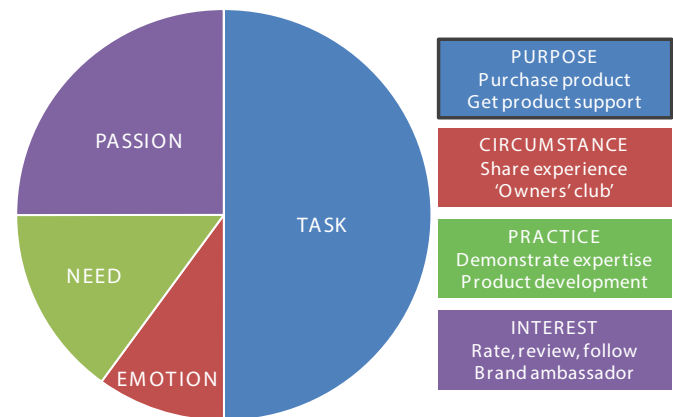
their products (**purpose**).

The MyOLYMPUS Community Academy, meanwhile, is for non-professionals to get tips, access video tutorials, and explore innovative camera features (**practice**).

One final motivation for members to return to the community is for their shared love of photography. Members can upload images taken on Olympus cameras to the gallery for other photography fans to admire and comment on (**Interest**).

RECIPE - COMMUNITY OF CIRCUMSTANCE BASED ON MEDICAL CONDITION

The Macmillan community is a site run by Macmillan Cancer Support, an established British charity. It offers the opportunity for cancer sufferers to come together within support forums (**circumstance**) to share personal experiences, and to organise volunteering to assist the charity's aims (**purpose**). It also allows members to contribute through their sporting passion (**interest**), and to get advice about treatments, therapies, finances and bereavement (**practice**).

The community is primarily based around structured groups offering topical discussion forums. Members are also provided with blogs which allow them to document experiences with opportunities for feedback and support from other site users.

PURPOSE
Fundraising Donate
Volunteer your time

CIRCUMSTANCE
Share your experience
Local support

PRACTICE
Financial advice
Bereavement advice

INTEREST
Longest day golf challenge
Triathlon
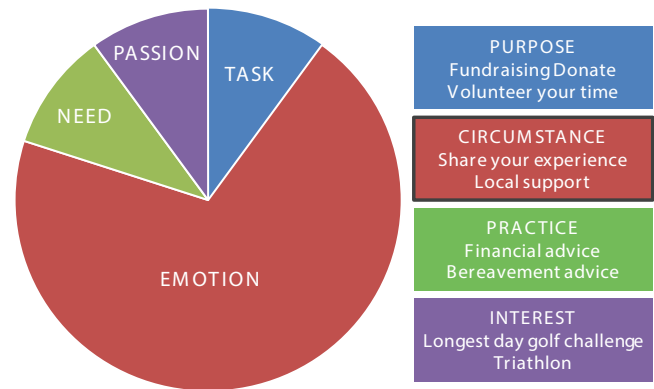
One valuable feature is the live chat rooms which allow users to interact more freely with each other, along with industry professionals and experts in scheduled chat sessions. Sessions also have transcripts made available for later catching-up by users who missed the live chats.

RECIPE – COMMUNITY OF PRACTICE FOR PROFESSIONALS

Nordic Semiconductor specialises in providing ultra-low power (ULP) wireless chips for use in consumer electronics like wireless PC peripherals, gaming controllers, sports and fitness sensors, toys, and advanced multi-media controllers and set-top box remotes.

It is also one of the biggest providers of wireless short-range connectivity, especially for Bluetooth applications.

Their community—Nordic DevZone—is primarily used as a way for customers to ask for specialist advice on development projects and improving their knowledge of Nordic products (**practice**).

With 54,000 registered users and more than 50,000 questions logged, it's one of the best examples of using a community for support. In fact, 63% of support requests are now directed at community members. That's a significant shift in burden from internal support tickets.
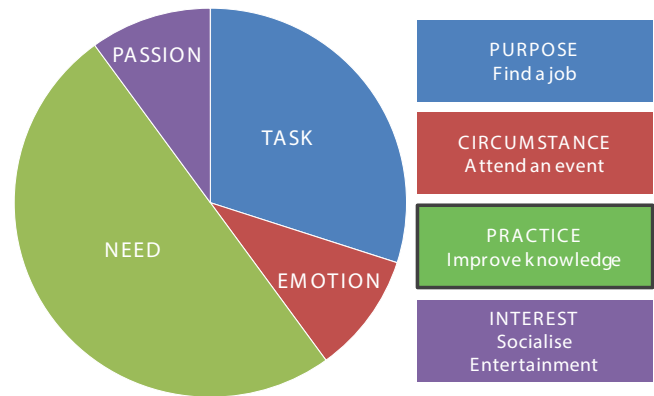
For the community members answering those questions and giving their advice, it's a way of sharing knowledge about an industry they are experts in and engaging in challenging discussions (**interest**).

For the internal Nordic Support Engineers, they are now interacting directly with potential customers and have a much greater visibility of what customers are trying to do.

The community is also for developers looking to use Nordic products in their projects. They can get help from their peers or the Nordic knowledge base (**purpose**).

RECIPE - COMMUNITY OF INTEREST FOR ENTHUSIASTS

The Royal Society for the Protection of Birds (RSPB) is one of the largest member organisations in Britain, and its community provides an opportunity for members and others to share their love of birds and of the organisation (**interest**). Members also frequently contribute to the RSPB's environmental campaigns and engage in fundraising on its behalf (**purpose**). Many groups meet locally, perhaps around specific sites owned by the RSPB with remarkable bird colonies (**circumstance**), while many members are happy to share their skills, in watching, recording or photographing birds, and even to make money out of their hobby (**practice**).

The RSPB community includes groups, which offer discussion forums, blogs and media uploads. Members are now able to follow
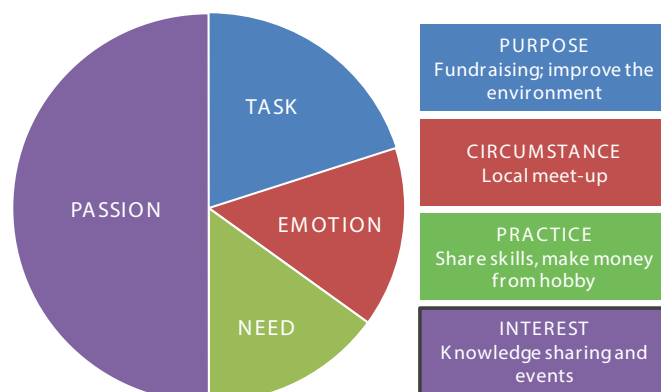
other users of interest and can take advantage of liking, bookmarking and sharing favoured content. The charity itself uses blogs and discussion forums to inform and respond to their members.

TOOLS

The tools of your kitchen are the devices you equip it with to enable you to make your recipes: your cookers, knives, pots and pans, bowls, blenders, and gadgets of every kind. Choosing the right tools for the job will make a huge difference to your chances of producing an excellent dish.

Yet it's not sensible to go out and buy every kitchen gadget available. Instead, you decide what's appropriate for the kind of kitchen you are running, the ingredients, recipes and methods you have chosen. Probably you'll start by buying the basics that will allow you to do most of what you want, and then add more specialist tools and gadgets when the need arises. It's not just a matter of budget – if you have too many new tools, and aren't familiar with what they all do, then you can be overwhelmed, waste time and effort, make poor decisions and possibly spoil the dish.

Keep it simple – the old adage works in your kitchen. And the same applies to choosing the tools – the platform itself, the functionality, the integrations – for your social platform.

Technology companies always try to sell you their products by listing all the features on offer. But most of the time, our understanding of the significance of these features is hazy. Instead, we choose our technology by making sure that it will do what we want it to do.

That's why this cookbook talks about audience, motivations and use cases before getting to functionality. Think about what you need and focus on those priorities, not on the shiny new features that sound good but will not help you make the dish you want. Different audience motivations give rise to

different communications needs. It is those communications needs that should determine your choice of functionality.

So when you are doing your initial planning, focus on the functionality that will help the audience meet its most important motivations. If after a while it becomes evident that additional tools are needed, you can easily switch them on later (and get some promotional buzz out of the fact you have enhanced the platform).

People often equate social platforms with one of two things – status updates (for networks), and big discussion forums (for community). But in our experience, these can be of limited value and sometimes can be positively off-putting, especially if the audience is likely to want to retrieve the content at a later date.

Some of the most common tools in any social space are described in an 'A-Z of Tools' in Appendix 2, along with their pros and cons for particular communities.

SELECTING YOUR TOOL SET

A community where people come to complete a task may require a different suite of tools from a community where people coming together to share their passion. The table sets out our view of some of the most important tools that are more, or less, important for each essential motivation.

Some tools – such as search, notifications, analytics, keywording – which are vital for any community, have not been included.

Green = Common
Yellow = Less Used
Blue = Least Used

Tool	Purpose	Circumstance	Practice	Interest
Sub-topics	Green	Green	Green	Green
Profiles	Blue	Green	Green	Green
Q&A	Green	Green	Green	Green
Blog	Green	Green	Green	Green
Calendaring	Yellow	Green	Green	Green
Gamification	Blue	Blue	Green	Green
Friending	Blue	Green	Green	Green
Wiki	Green	Green	Green	Green
Social Sharing	Yellow	Green	Green	Green
File Sharing	Green	Yellow	Yellow	Green
Private Messaging	Yellow	Green	Yellow	Yellow
Forum	Green	Green	Green	Green
Ideation	Green	Yellow	Green	Green
Chatbot	Green	Yellow	Yellow	Yellow
Knowledge Base	Green	Green	Yellow	Yellow
Custom Features (e.g Job Board, CPD)	Yellow	Yellow	Green	Green
Support / CRM Ticketing	Green	Blue	Green	Blue

DIFFERENT INGREDIENTS NEED DIFFERENT METHODS OF COOKING

Different methods of cooking – boiling, baking, grilling, frying – can be used for a range of ingredients, but some lend themselves better to some ingredients than others. You can turn dough into bread in a pan over an open flame, but baking produces much better results. Boiling would not work at all.

Complex recipes with a mix of ingredients require several techniques to produce the result – a curry may involve frying the spices, braising the meat and vegetables, and boiling the rice.

In the context of your social business, the methods are the strategies, policies and plans you put in place, to make your audience feel they can converse comfortably, safely and usefully.

The strategies relate back to the audience goals, which themselves relate to the use cases and motivations. Thus, for example, if your audience's prime motivation is purpose and the goals are transactional, then ensuring you have a commercial strategy in place is key. If, on the other hand, the motivation is interest, and the audience primarily wants to engage with others who share that interest, then the commercial strategy is far less important than the sustainability strategy (the one which ensures a continued flow of enthusiastic members).

Ingredients & Recipes

Tools

Methods

1. Audience primary motivation

	Use cases
Purpose — Complete a task	Customer / Employee
Circumstance — Connect emotionally	Carer / Faith
Practice — Fulfil a need	Professional / Student
Interest — Share a passion	Hobbyist / Enthusiast

2. Audience goals

- Transact
- Collaborate

- Learn
- Network

- Develop
- Succeed

- Enjoy
- Engage

3. Solutions

	Platform
Fulfilment / Feedback / Innovation	Ideation, Q&A, profiles, IM, groups, blogs
Sentiment / Sharing / Advice	Discussions, blogs, friending social calendar
Knowledge / Influence / Leadership	Blogs, profiles, Q&A, groups, wiki, hashtags
Experience / Reviews / Insight	Gamification, blogs, hashtags, friending, files

4. Strategy

- Business
- Support
- Content
- Sustainability

The motivation profile of your audience will help you prioritise and allocate resources to ensure you have the important plans in place.

Within each fundamental strategy – business, support, content, sustainability – there are a number of plans and policies that must be developed, resourced and implemented.

For example:

The business strategy is concerned with identifying the market need and opportunity for raising revenue through transactions or collaboration engendered by social activity; and with setting targets and ensuring that these are met:

- Pre-launch research
- Marketing & sales plan
- Adoption and launch plan
- Agree benchmarks and success metrics
- Embed in personal objectives

The support strategy refers to how you support your audience in achieving their own goals within your social space, and in particular to establishing a space in which people feel is well-managed and welcoming, where they can safely meet one another (network) and open themselves up to learn from one another:

- Appoint a community manager
- Moderation and governance
- Define social media policy and terms of use
- Mentoring plan
- External champions recruitment and training

29

The content strategy recognises that the attraction of your social space will depend, in part at least, on the uniqueness, quality and relevance of the content to be found there, to allow the community members to learn about your specialist topic and to succeed in their endeavours. You will always need to source and publish a high proportion of this material yourself – this is your unique selling point, making this the place to come to improve knowledge. Even if you intend for some of this content to be user-generated, a strategy is required to ensure the continued flow of such content.

- Appoint a content manager
- Key topics, content types and contributors
- Quality control
- Publication plan

The sustainability strategy addresses the need to avoid staleness in your social space, and keeps it fresh and lively by ensuring that members return to it, engage with all the opportunities you offer, new members are recruited and find it an enjoyable experience, and cliques are not established that dominate and restrict discussion.

- Profiling and access rights
- Incentives
- Reputation & succession plan
  - Design a working agreement for volunteers
  - Monitor activity and plan for burn-out

You certainly need to be aware of all these four strategies, and to consider them, but there is a lot here, and your motivation profile should assist in prioritisation. Nevertheless, certain things may be essential at the outset, such as managing and governance of your social space, and access rights (who will be allowed to join, what posting rights they have, and so on).

It is also important that, within the business, the social space is not seen as an 'optional extra' of limited interest to those not directly involved in setting it up, but a natural and important way of reaching the audience for all departments. We would recommend training in professional online social behaviour and in platform use, for all audience-facing teams.

In fact, the social platform itself offers a more interesting and useful opportunity than traditional 'hand-me-down' training as it allows your teams to work together collaboratively, to explore the opportunities and challenges created by the social platform for your business. Rather than training, this is 'social learning,' where people learn and create, together, the things your social business needs to succeed. Social learning courses, both for your staff and for key volunteers ('external champions') can be tailored to your business, and allow the teams themselves to collaboratively generate many of the plans and policies your business needs to succeed.

Takeaway tips
- A customer community will impact the whole business, not just sales and customer service.
- Make 'social' a normal part of everyone's workflow, not an optional extra.
- Set up a project team to plan and create your social space.
- Once it's up and running, you may need a different team to manage your social space.
- Social learning lets your colleagues learn the value of collaboration on your social platform by 'doing it.'

CONTENT AND COMMUNITY MANAGEMENT

The content and community manager is your head chef (or chefs – in a large organisation the work may need to be allocated over more than one person).

This is the pivotal role for running your social space – and may well evolve into a pivotal role in the entire organisation. Resource it well.

It's vital to appoint the right person or people early on, and involve them in the planning; also to give them the right support to talk to everyone else in your business to make the social experiment a success.

There are a lot of aspects to being a community manager – it's not an easy, or a junior job.

Takeaway tips
- Support your content and community managers to work creatively with a small number of volunteer members of the community to ensure that the community serves the audience, not the business.
- Don't try to measure ROI on the social platform as a whole, but work with each customer-facing department to establish social-platform KPIs that help that department.

Platform Management
- Feature selection
- Tools/apps & how to use them
- Upgrades & improvements

Community Management
- Connecting people
- Moderation
- Work with champions
- Rule enforcement
- Blog posts
- Forum seeding
- Comments
- Rewards & incentives
- Back-channel engagement
- Manage groups & support group owners

Community Metrics
- Social network analysis
- Google analytics
- Taste tests
- Polls
- Surveys
- Management reports

Business Planning
- Alignment with business priorities
- Purpose goals

Outreach
- New member welcome & induction
- Campaigns
- Newsletters
- E-bulletins

Professional Development
- Identifying good practice
- Networking
- Attending events
- Participate in SIGs

Content Management
- Commission & publish formal content
- Updating links & navigation
- Updating FAQs
- Deleting & archiving
- Managing tags, categories, themes
- Taxonomy management

GOVERNANCE, ROLES AND RESPONSIBILITIES

Clarity as to who is responsible for what, and who reports to whom, is vital for any organisation – and in professional kitchens it needs to be very clear who is in charge of each part of the operation.

However in a collaborative situation such as a social space, the responsibilities can be blurred or confused, and if this is the case, the chances of success are reduced. Communal decision-making may be tempting but does not often produce quick or decisive interventions.

The following table is therefore suggested as a way to identify the key roles within the social space, and to set out their major responsibilities and reporting lines.

It is, of course, important that the people being reported to, including senior management, understand what is expected of them to ensure the social space is a success.

Role	Responsibility	Reporting to
Group owner	▪ Manage group membership ▪ Moderate group content ▪ Define goals ▪ Set & achieve targets	▪ Community manager ▪ Community manager ▪ Business or departmental manager ▪ Business or departmental manager
Site administrator	▪ Technical maintenance of site	▪ Community manager
Community manager	▪ Manage site membership ▪ Manage site-wide activity ▪ Moderate & publish content ▪ Support group owners ▪ Report against agreed KPIs	▪ Community owner
Community owner	▪ Secure resource ▪ Demonstrate business case	▪ Senior Management Team
Business/project manager	▪ Define & own task-driven project	▪ Senior Management Team
Departmental manager	▪ Define & own departmental initiative	▪ Senior Management Team

THE FINISHED DISH – THE PROOF IS IN THE ROI PUDDING

With the right ingredients and recipes (motivations), tools (functionality) and methods (business strategies), you can make excellent dishes.

How good the dishes are, and how well suited they are to your customers, you will know from audience feedback, reviews and analytics – footfall, the number of repeat customers and so on. Most restaurants, like other businesses, will go on fine-tuning the menu and recipes to get everything right – and to make sure the restaurant doesn't go bust while doing so.

But calculating the ROI of the meal you serve in a restaurant is fairly straightforward. You can sit down and run the numbers. With a community it's harder to pinpoint ROI. They provide value in ways which aren't immediately obvious to decision-makers.

When you think about the ROI of your community, you need to understand return on investment as a function of why people join your community.

People visit different restaurants for different reasons. Sometimes the intention is quick low-cost refuelling, sometimes it's a lingering meal with new and memorable tastes in a smart, congenial environment. Others use the restaurant as a place to meet and talk, and may even see the food as secondary to the atmosphere.

The same is true for social communities.

We outlined the four main categories on page 19 but to recap, the four main reasons for joining/using a community are:

PURPOSE - I want to complete a task
CIRCUMSTANCE - I want to connect with others
PRACTICE - I want to fulfil a need
INTEREST - I want to indulge in a passion

As you can see, the motivations for joining a community differ greatly, and that means the business outcomes will differ as well. It's not always a function of dollars/pounds back.

Taking all this into account can be frustrating if you don't know how to tie your ROI back to the purpose of your community.

This next section will simplify things for each type of community so you can say "hey this is where we're moving the needle, this is where we need to improve, this is how we are improving customer service."

Of course, we've already seen communities cover multiple purposes so several of these will apply to yours.

Before we dig in, how would you currently define the ROI of a social community.

COMMUNITIES OF PURPOSE ROI

A community of purpose is most commonly a place customers or prospects come to discuss an organisation's products, to find out how others are using them, to resolve issues, and to interact with the customer service team. In other words, it's a community built for support.

And if the primary motivation is a support channel, ROI doesn't have to mean money in your pocket. Reducing support costs is a massive cost-saver and the cheapest way to cover support requests without sacrificing customer service is having your community answers queries.

The Nordic Semiconductor example we used on page 24 is a perfect example of this. 63% of support requests are now directed at community members. This deflection from email/call/ chat support is a significant shift in burden.

There is a simple equation you can use to calculate your rough support cost-savings:

(Cost per support call x Support calls per month) x Deflection rate

Example: If you get 5000 support calls a month and each one costs you £10, that equals £50,000 per month. Deflect 30% (which is fairly conservative) and you save £15,000 per month.

Deflection rate depends on the quality of your community, but deflect 63% like Nordic and you'll save £31,500 per month.

Keep in mind this doesn't factor in equipment, operator training and overhead, so there are additional cost-savings.
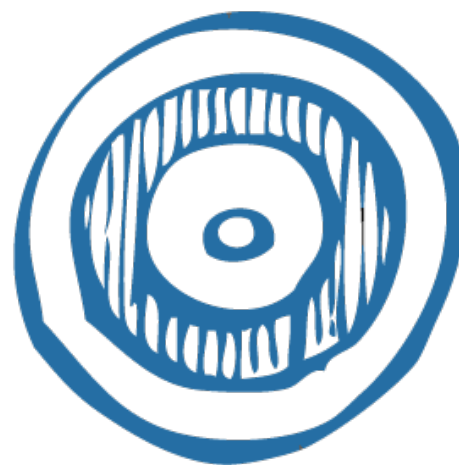
This means custom-built communities recoup their investment fairly quickly.

A COMMUNITY OF PURPOSE INCREASES CUSTOMER LIFETIME VALUE

Having a community actively solving each other's problems massively improves time to resolution and that boosts customer service and, ultimately, customer satisfaction.

In an era where 61% have stopped doing business with a company due to poor customer service (Microsoft), this is extremely important for customer retention.

Again, ROI doesn't have to mean money in your pocket. Product insights gleaned from the community are also a valuable ROI. How much would you otherwise pay for honest insights? Having this level of involvement and a shorter feedback loop reduces the time to bring improved products to market and gives customers a voice— and that's powerful.

If you want to tie this to ROI further, consider how many community ideas validated existing plans and decisions, and how many new ideas were implemented.

COMMUNITIES OF CIRCUMSTANCE ROI

A community of circumstance is a group of people who find themselves experiencing a similar situation, rather than a shared interest or need. These are most commonly health-related communities—such as the Macmillan example on page 23. But they can also be around subjects such as finance and insurance, meaning it's a little harder to pinpoint ROI.

Let's use the Macmillan community as an example. For them, financial KPIs take a back seat.

FINANCIAL KPIS TAKE A BACK SEAT

Their community is built to encourage people to connect and get support because that's Macmillan's mission. This means the primary ROI of their community is their members getting value from the conversations they have and the relationships they make.

Of course, Macmillan needs funding to continue helping people, so there is a financial aspect to the community.

But the more they help people, the more likely they are to create opportunities for people to donate. Whether that's through family and friends looking to fundraise or even people leaving donations in their will as a thank you for supporting them in their time of need.

COMMUNITIES OF PRACTICE ROI

A community of practice is a professional space where people who share a craft or a profession come together to share knowledge and develop/refresh professional skills.

Making your customers successful is a long-term retention strategy, but your business rises and falls based on your customers. If you establish your brand community as the resource for satisfying their needs, they won't leave—no matter how many competitors come knocking.

There's also a nice loop that occurs with this type of community. The more people reveal their needs, the more you can target and refine your knowledge base and content marketing. And the great thing is, in communities of interest, people are extremely forthcoming with information about themselves and their needs.

This gives you the opportunity to cross/up sell with greater success by giving them a personalised experience (direct ROI). The same is true for communities of interest.

COMMUNITIES OF INTEREST ROI

A typical community of interest is a place to meet other people who share an interest, hobby, belief—anything you are passionate about.

Members of communities of interest—individuals who have made the effort to register and participate, even to a small degree—create a brand affinity. And every time they engage with the community it grows.

MEMBERS BECOME INCREASINGLY LOYAL BECAUSE THEY BUILD A DEEPER CONNECTION TO THE BRAND

They not only purchase more over time and are less likely to defect to competitors (direct ROI), but they also become brand advocates and recommend the company's products and services to others (indirect ROI).

In fact, increasing brand reach through word of mouth is one of the best ways to generate new business—people trust the opinions of others much more than a business.

THE CHERRY ON TOP? BRAND ENGAGEMENT

Notice we didn't mention engagement?

Usually when we ask the question at the start (how would you currently define the ROI of a social community), the most common answer is engagement.

While engagement is a great marker of community success, it doesn't keep the lights on.
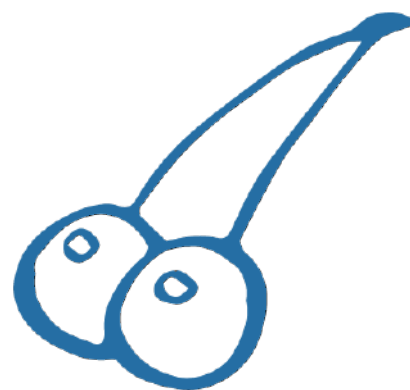
However, regardless of community purpose, engagement contributes to what does: retaining members/customers; acquiring new members/customers; increasing member\customer spend; reducing support costs.

For those metrics, community engagement has a measurable ROI. But there are benefits to community engagement that will always defy measurement: the touching stories, the meaningful relationships, the product insights you can't get anywhere else.

It's the cherry on top of the ROI cake.

THE AFTER DINNER COFFEE? SEO

Thriving online communities create massive amounts of user-generated content, which is indexed by search engines.

(For the non-technical, that means search engines can read the content and display the page in search results).

This "free" content has a positive impact on placement on search engine results pages—thanks to hyper-specific search queries and relevant keywords.

This means new customers can arrive via all manner of questions asked and answered by your community, meaning your cost of customer acquisition drops significantly—that is some tasty ROI.

There is one crutch here: to take advantage of the SEO benefits, your community has to be hosted on your domain, which rules out social media communities.
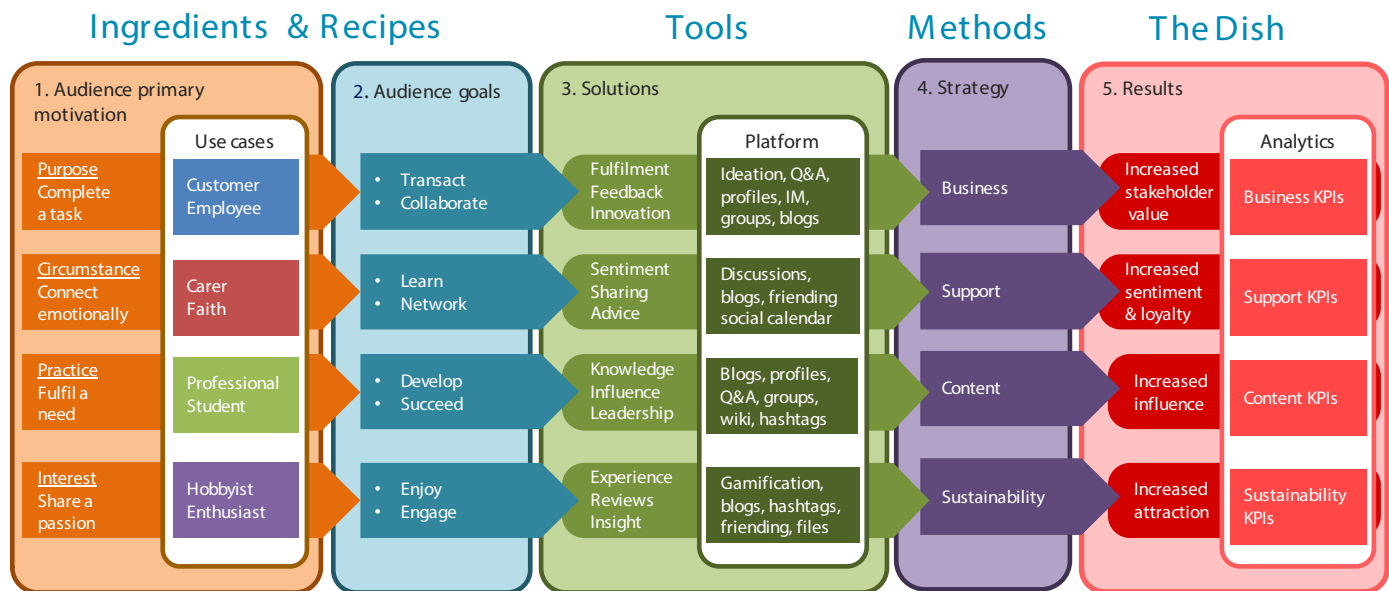

Takeaway tips:

- Start with your audience's motivations for joining the community. Being clear about their goals/needs will help you align community efforts to ROI.
- Keep it simple - start with the main motivation and explore the detailed use cases later.
- Remember, online communities are a long term investment. It takes time to build up momentum.

Results and Analytics

Your performance indicators will match your particular mix of motivations. If the primary motivation is transactional, then business KPIs –higher-value transactions or reduced costs–

will dominate. But where the main motivation is sharing enthusiasms, financial KPIs will matter less than the sheer numbers of people who are finding the site attractive.

Ingredients & Recipes | Tools | Methods | The Dish

1. Audience primary motivation

	Use cases
Purpose Complete a task	Customer Employee
Circumstance Connect emotionally	Carer Faith
Practice Fulfil a need	Professional Student
Interest Share a passion	Hobbyist Enthusiast

2. Audience goals

- Transact
- Collaborate

- Learn
- Network

- Develop
- Succeed

- Enjoy
- Engage

3. Solutions

	Platform
Fulfilment Feedback Innovation	Ideation, Q&A, profiles, IM, groups, blogs
Sentiment Sharing Advice	Discussions, blogs, friending social calendar
Knowledge Influence Leadership	Blogs, profiles, Q&A, groups, wiki, hashtags
Experience Reviews Insight	Gamification, blogs, hashtags, friending, files

4. Strategy

- Business
- Support
- Content
- Sustainability

5. Results

	Analytics
Increased stakeholder value	Business KPIs
Increased sentiment & loyalty	Support KPIs
Increased influence	Content KPIs
Increased attraction	Sustainability KPIs

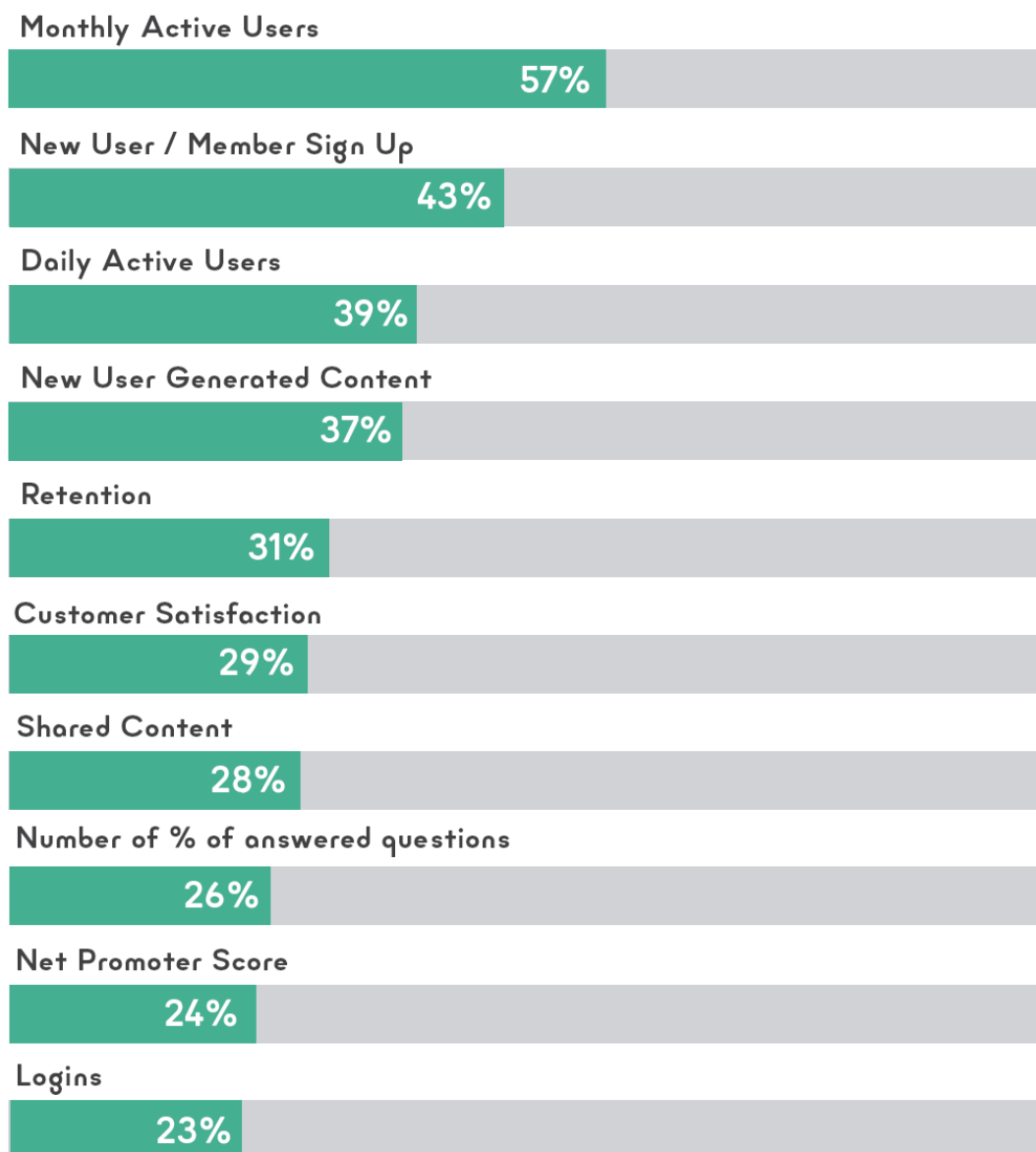# HOW ARE EXISTING COMMUNITIES MEASURING SUCCESS?

Communities are maturing not only in terms of years of existence but also in how people understand and measure their influence.

For many, they are no longer a nice-to-have but rather are an integral part of the organisation.

Below are the most popular metrics for meas-

uring the impact of an online community, taken from the latest CMX Community Industry Trends Report.

Unsurprisingly, the measurements online community professionals say they use to measure impact are more focused on engagement, and less on actual business value.

Monthly Active Users
57%

New User / Member Sign Up
43%

Daily Active Users
39%

New User Generated Content
37%

Retention
31%

Customer Satisfaction
29%

Shared Content
28%

Number of % of answered questions
26%

Net Promoter Score
24%

Logins
23%

Source: CMX 2020 Community Industry Trends Report

CONCLUSION - THE BILL

The successful social business, like the successful restaurant, comes from fusing the audience's needs, the business's requirements and the imaginative understanding of the ingredients in the choice of recipes. It also requires the skilful selection and use of the right tools, a solid understanding of the methods that underpin everything, and continual reappraisal of how things are going.

There are a lot of successful restaurants in the world. Use this cookbook to learn their secrets of success in making your business a social business.

FOR FURTHER INSIGHTS, ASSISTANCE ON UNDERSTANDING

- how to plan you make your business a social business
- how to introduce community effectively
- how to train your staff through tailored social learning courses
- how to make your existing community more sustainable
- how to introduce the right technology stack and integrate with your existing systems
- how to configure the platform for the best results

and for all other technical and strategic support, contact:

info@4-roads.com
Twitter: @4roads
+44 808 189 2044

Appendix 1 – the Business case

If you want to begin the business change that is involved in becoming more social, you have to take the senior management, the department heads and the staff with you. To do this, your business case needs to show that it is in the interests of each of these levels of the organisation.

The following tables offer a way of doing this. Each of the typical main arguments for social are identified, and reinterpreted at each level. These, together with the value maps (shown in the chapter on Results & Analytics, can form the basis of a readily understandable business case for investment in social.

As with other templates offered in this cookbook, you will want to modify the tables to relate more specifically to your business.

Internal community

How will an internal social platform help communications	How will it help the employee	How will it improve the business
It's a place for sharing expertise and good practice	I'll have a new way of finding answers from across the organisation and the stakeholder network	Consistency of offerings
It will help bring people out of their departmental siloes	I'll feel more confident that I'm receiving the most up-to-date and correct information	Up-to-date information
It's a place for driving innovation	I can see everything associated with my project in one place	Improved offerings
It's a hub for bringing people together	I can talk about the organisation and how we can all do our jobs better – and I know that the leadership team will be listening.	More efficient delivery
It gives a new channel for internal communication, allows closer contact between the leadership team, the rest of the staff and partners	I'll get richer and more useful contact with my colleagues but receive fewer 'cc' emails and be involved in fewer meetings	Increased productivity
It helps bring together staff in different locations, and assists with induction of new joiners	I can get to know colleagues who I don't often talk to face to face	Greater innovation
It encourages knowledge exchange and improves partner support	I can offer my own broader expertise to help my colleagues – and raise my personal and departmental profile	Improved motivation

External community

How will a community platform help communications	How will it help me (the customer)	How will it improve the business
It's a place for sharing expertise and good practice	I'll have a new way of finding answers from across the organisation and the stakeholder network	Consistency of offerings
It allows customers to support one another	I'll know that I'll get relevant and timely information that other people have found useful	Improved retention
It's a place for driving innovation	I can contribute to the development of the organisation's offerings and policies	Improved offerings
It's a hub for monitoring sentiment about the brand	I can talk about the organisation and how it can be improved – and I know that the staff will be listening.	Greater trust in the brand
It provides a place for safe conversation between customers, and between customers and staff	I can use this as a safe place to express and gather opinions about the profession	Sharing of grassroots opinion with the rest of the organisation
It helps bring together customers or members in different locations	I can work with others in my region or area on relevant issues	More effective local engagement
User-generated content encourages knowledge exchange and improves partner support	I can offer my own broader expertise to help my colleagues – and raise my personal profile	Improved motivation

Resourcing your community

Costing and scheduling the launch of a new community is of course crucial to the business case. While no two instances are the same, it is worth noting that the cost and implementation of the platform is only part of the resource required.

At the outset, allocation should be made for resourcing the community management, training and marketing the new site, whether internal- or external-facing.

The initial launch platform should provide the essential functionality to match the use cases and motivations, but additional functionality may be required later – care must therefore be taken in prioritising the implementation of the platform, and in budgeting for additional functionality in year 2.

APPENDIX 2 — A-Z OF TOOLS

Tool	Advantages	Disadvantages
Activity stream A panel pulling together recent activity relevant to a particular community member.	It gives easy access to recent activity and allows for quick answers of questions.	Activity streams may be confusing . If the stream is set too wide, users will see irrelevant information; if set too narrow, they may not be aware of other relevant content.
Analytics Reports on activity on the site in specific time-frames and trends over time both in generic terms (eg number of page views) and specific (types of post by individual members).	Information on the activity profile of each member (eg do they tend to be readers, askers, answerers, commenters or influencers?) can help community manager in many ways. A suite of analytics can be used to report on historic trends, give snapshots and help steer future activity.	Reports on trends in the conversations (number of views, number of posts, etc) can be derived from Google Analytics . Other metrics (answer rate, or volatile topics), require bespoke functionality
Chatbot A chatbot is a piece of software that conducts a conversation via auditory or textual methods.	Chatbots are great for answering first-line questions or direccting users to the correct person/page. They deflect support queries and give users an instant answer.	They can't give more answers beyond what it's taught to say—after all, it's programming. They lack the ability to interpret language/spelling variations.
Discussion forum Site-wide forums can be structured hierarchically into topics and separate discussions (threads).	Site-wide forums are most useful in situations such as customer communities where the conversation is likely to be focused on individual products. In complex communities, groups (community subsets) provide better spaces for conversation and allow the conversations to be linked with other content (blogs or files).	Discussion forums cannot be structured in a fine-grained manner and the most valuable conversations or comments often get lost. Conversations tend to be undirected, and can become dominated by a few voices, or stray from the topic.
File-sharing Allows members to upload files, view them and comment on them. Group functionality usually permits file-sharing within a sub-set of the wider community.	Site-wide file-sharing is most relevant to a community of interest or an internal community of purpose.	File-sharing often fails when not linked to document preview facilities, also where there is no agreed protocol on file naming.
Friending/following By befriending or following others, you are pointed to their activity elsewhere on the site, and they may have access to yours. Befriending may permit you to send a private message.	This feature is most useful on a large and complex social platform, to allow individuals to move out beyond their initial area of interest and to discover other areas of the site.	When new people join a site, they tend to look for people to follow. However, it is not always clear to them what advantage they gain by doing this, and they may stop using this facility.
Gamification and kudos A range of strategies for making people feel good about their participation on the site. The simplest form rewards the numbers of posts a member makes, by giving them a status or title on the site. More complex schemes let members to compete with one another.	Rewarding contributors for the number of 'likes' their posts have received can be effective. Gamification and kudos schemes must be related to the motivations of the audience members, to their common culture and language.	Rewards for numbers of posts can lead to people posting endlessly and thoughtlessly. Inappropriate gamification schemes on a community can give members the sense that this is not the right place for them.

Tool	Advantages	Disadvantages
Ideation A form of discussion forum to encourage sharing and evaluating ideas. Members vote up and contribute to good suggestions.	Particularly valuable to a product development community, working with colleagues, partners or customers.	Contributors to ideation should be rewarded for good work.
Keywording Keywording allows the creator of a post, or others, to add keywords from a visible directory.	Keywording links posts to topics, and ensures they can be found again.	The restricted directory of keywords means they support major topics on the site.
Knowledge Base A knowledge base is a self-serve online library of information about a product, service, department, or topic.	Great for letting customers self-solve their problems, without needing to wait for a support rep to become free.	
Moderation tools Tools for members to report offensive posts, for the community manager to delete them, and for repeat offenders to be blocked.	Even the best-behaved community needs the comfort of moderation, and most moderation should be done after publication, often when members object to the post.	Good moderators use these tools sparingly, and prefer reason and encouragement to heavy-handed police action.
Notifications Email notifications, based on subscriptions to discussions, blogs or question, keep members up-to-date with relevant activity, via daily or weekly updates.	People need continually to be reminded that the space exists, and to know that relevant material is being posted.	Users can be over-whelmed by notifications, and should control the number and range of notifications they receive. Switching them off entirely is not recommended.
Private messaging The facility to send a private message to another community member via the site, without revealing the sender's email address.	While public discussion forms the lifeblood of the community, in some cases a private message between individual members is preferable.	The site should be configured to ensure that unwelcome messages are not received. In a business, staff members should be able to message each other; but in a public community, messaging should be restricted to those who have agreed 'friendship.'
Profiles A profile page combines material you choose to publish about yourself and the data compiled by the platform from your activity on the site. Associated with profile pages is a member directory, allowing members to see who else belongs to the site.	In communities where people want to be seen as trustworthy, you want to know who you are talking to, something of their background, and whether others have found the posts useful. Profiles allow staff to list expertise, and allow others working in that field to be aware of what you have to offer.	Many people fail to use the profile page adequately, filling it with cursory information. On some sites, people choose 'avatars' or graphical representations of themselves rather than photographs. This may suffice where trust or personal knowledge is not important, but for a professional or colleague community it is inappropriate.
Q&A A Q&A feature allows a community member to ask a question for other community members (including employees) to answer, and for the best or most helpful answers to be flagged as such, to float to the top, and for the question then to be 'closed'.	This can give community member quick access to information, means a common question only need be answered once, and forms the basis for evolving FAQs. Q&As are valuable for customers who want help in solving a specific problem; in communities of practice where new practitioners want advice from those with more experience; and in a business where a problem may have been solved elsewhere previously.	

Tool	Advantages	Disadvantages
Search The search should be segmented, making clear whether a result represents a blog, a profile, a keyword or hashtag, a post in a forum, etc. and list results by relevance, date or usefulness.	A large social space is virtually useless if the members can't find the pearls buried in it.	A poorly segmented search, which fails to identify the type of post and cannot be filtered by date, can be worse than useless in a community – especially where a post in a discussion thread may have been quotes and copied multiple times.
Sitewide Blog There are two kinds of blog, the kind in which a single person write a regular post, or a contributed blog in which several people are permitted to post. Blogs normally accept comments.	The site-wide blog can be an important way of updating the site, expressing its voice, unifying the many constituencies on the site, and responding to general comments about the site or the organisation as a whole.	Some organisations fear comments on blogs, pre-moderate them. This is rarely desirable or necessary (unless the political profile of the site is unusually high) as it implies defensiveness. Better simply to disable commenting on sensitive blogs.
Social Calendaring Social calendaring allows site or group members to input their own events onto a general calendar.	Particularly useful for a community of circumstance, where individuals may be seeking to meet up, or to organise a complex programme of events.	
Status update Status updates ('tell us was you're thinking') are common on large networking sites, where personal news is of the essence.		Too undirected to be useful on most community spaces. Once the update is gone from the immediate feed, its content is hard to retrieve.
Sub-topics Mini-collaborative spaces within the site, with access managed by a group owner. A group can have its own content (news or blog), discussions, and moderation policy, calendar, file-sharing library, and wiki. Content can be visible to all, or kept private.	Groups can be excellent places for covering secondary motivations, and also for specific tasks (eg. project teams in an internal community). Group owners should be made aware of their responsibilities to the smooth functioning of the community, and offered training.	There is a danger of groups being set up without a realistic hope of an audience. It is advisable to establish policies on who can set up groups, and when (eg. can the person proposing the group show there are at least five others who will join?)
Wiki A space where community members can contribute content, and edit, comment on, add to of delete one another's content.	A wiki allows community members to craft and discuss a document collaboratively, such as a community body of knowledge, or FAQs about a product.	It is important to keep the subject closely focused and monitored. Processes need to be in place to ensure that the quality is high. Contributors must understand the copyright position of their work – especially if there is any danger of being seen to betray commercial confidence.