



10 steps to building better online communities

The guide to managing & engaging your
online community



toucantech

Developing diverse communities

Connected communities are impactful for so many reasons; now more than ever, people are finding reasons to connect virtually.

This guide is great for all kinds of communities:

1. Alumni communities

Alumni communities for both schools and higher education institutions are a space for former students to give back to their alma mater, and to gain skills & connections from a wide network of alumni. While the end goal for alumni communities is often to encourage donations, alumni have much to gain by playing an active role in these online communities.

2. Membership communities

Membership associations often provide online communities as part of the value that they offer members. Members are motivated to join to expand their own networks, meet suppliers and learn from key industry figures and experts. Creating an exclusive, engaged community for your members to join is a good way to increase 'stickiness', and it can impact positively on renewals.

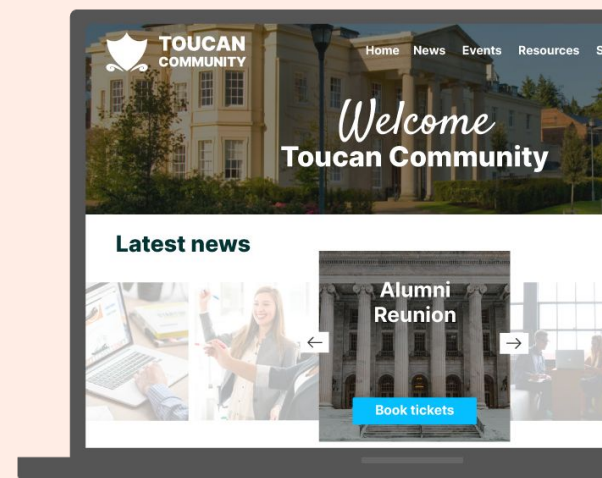
3. Charitable communities

Charities and nonprofits often form communities naturally, either through beneficiaries or supporters who want to help further their cause. Charitable online communities are a great place to share progress, remind supporters of their impact and continue stewardship in between donations.

4. Business communities

Business communities may be made up of former employees of a single organisation, or a professional network for like-minded entrepreneurs looking to connect.

No matter what the purpose of your community is, bringing people together and engaging them requires similar tactics. Using this guide, you can learn more about managing, growing and engaging your community members online, with advice from superstar community managers & top tips to help save time & increase efficiency.



What is an online community?

Building a community online enables every member of your network to connect with your organisation and one another, no matter where they are in the world.

At ToucanTech, an online community refers to a website with a public and a private area. Community members can create an online profile to access this logged-in area where they can message others, access a directory, join groups, browse content, sign-up for events and more.

Community managers and admins can choose to publish content on either the open website or the members' area, communicate with people in certain segments and create reports on community engagement.

Encouraging your network to join an online community provides a reliable way to deliver value to them, and makes it easy to engage with your organisation.

What's included in this guide:

10 steps to building better communities

1. Getting to know your community
2. Launching an online community
3. Community engagement planning
4. Facilitating community engagement
5. Creating captivating content
6. Moderating community interactions
7. Personalising everyday engagement
8. Encouraging repeat visits
9. Incentivising engagement
10. Reporting on community engagement

Growing communities

At ToucanTech, we've been helping community managers to grow & engage their communities online since 2014. With over 200 customers across the globe, we're experts in bringing together communities for alumni, membership, nonprofit and corporate organisations.

This guide pulls together insights garnered from our customers, who are successfully engaging communities of thousands, as well as our own team of engagement evangelists who are experts in saving time on admin and making community management more effective. It's designed to help you get your online community off the ground, and to provide strategies and ideas to sustain engagement over time.



1. Getting to know your community

Segmenting key community profiles

Whether you’re planning to build an online community now or in future, it’s helpful to create profiles of your community members to dig into who they are and what they are looking for from your organisation. Segmentation refers to process of dividing up your community into more manageable groups that have a common factor, so that you can engage them on an individual basis, share tailored messages and relevant opportunities, and check that your programmes offer the kind of activities that they might be interested in.

When planning your segmentation, think about the kinds of factors that could influence what you’d like to share with them, and what would motivate them to join and engage. For example:

<p>Organisation type: Schools</p> <p>Example segment: Graduating classes of the 1970s</p> <p>Motivations to join:</p> <ul style="list-style-type: none">• Read updates about former teachers and classmates• Hear about upcoming events• Reconnect with old friends <p>How would you engage this segment differently?</p> <ul style="list-style-type: none">• You can invite this segment to join a club specifically for an interest or sport• Share a link to an interview with a teacher who was there during their school years – sign up to read the full article!	<p>Organisation type: Membership</p> <p>Example segment: Senior employee of member organisation</p> <p>Motivations to join:</p> <ul style="list-style-type: none">• Additional learning for their personal development• Exclusive access to events & content• Accreditation <p>How would you engage this segment differently?</p> <ul style="list-style-type: none">• Ask them for feedback on how they can get the most value out of their membership• Invite them to member-only events• Create a group for employees working in a similar job function or industry to share best practices & ideas	<p>Organisation type: Charities</p> <p>Example segment: Major donors</p> <p>Motivations to join:</p> <ul style="list-style-type: none">• Keep up-to-date on progress• Connecting with other donors• Get a better understanding of your mission and your work <p>How would you engage this segment differently?</p> <ul style="list-style-type: none">• Recognise their impact as a major giver, and invite them to share their reasons for donating• Offer exclusive access to fundraising events• Use the interactive points on your website as part of your overall stewardship strategy	<p>Organisation type: Corporate</p> <p>Example segment: CEOs/CTOs/COOs</p> <p>Motivations to join:</p> <ul style="list-style-type: none">• Expand their own professional network• Learn about potential partners• Thought leadership• Raise their profile <p>How would you engage this segment differently?</p> <ul style="list-style-type: none">• Invite them to speak at an event and share their experience• Invite them to a networking event• Invite them to list their business on your business directory• Offer them free job postings on your jobs board
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Segmenting your community early makes it easy to manage in your database, by tagging users in these groups. This can help your team to handle these segments ongoing, to send out communications, invite to events and report on engagement in these smaller groups.



ToucanTech Tip: Create user groups in your database using your community profiles so that you can use the insights from this exercise to plan campaigns & quickly communicate with these segments.

2. Launching an online community

Launching an online platform is an exciting step for any growing community. In one place, members can connect with each other wherever they are in the world, access resources, sign up to events and participate in exciting discussions. However, convincing your members to sign up for a new platform takes time, planning & some creativity! It's important to put yourself in the shoes of your members and understand what makes them tick, so that you can share benefits of joining that will resonate with them.

Soft launching your community

Using a 'soft launch' approach to kickstart your online engagement is a great way to gain initial feedback, as well as to populate the site with engagement from actual users prior to sharing with your wider community. It gives you a chance to sense-check the layout and user experience of your community portal.

Here are four ways to optimise your launch:

1. Segment your communications & incentivise members to join your platform

Now that you've built some profiles of your community members, use these insights to guide you in segmenting your all-important launch communications. The easiest way to do this in a tailored way is through email invitations – you can choose to share 'gated' content, an event that they need to share details in order to register for, or even showcase other members who have already signed up.

Focus on providing 3 takeaway reasons for a prospective member to join your community, that they can remember and share with others.

2. Use advocates/existing members to support launch

Delegate responsibility for engaging certain segments to those that are influential/active in those areas. Some options could be:

- Head Boys / Girls
- Well-connected donors
- Senior employees at a member organisation

3. Maintain momentum throughout the launch campaign

Be realistic about planning a launch campaign that spans a number weeks, or even months, to capture as many people as possible in the initial stages of your online community. Use a project plan to keep track of your launch activities, including publishing content, sending comms & hosting events.

4. Consider how you will report on engagement going forwards

Planning your reporting will make it much easier to determine the overall success of your launch, and help to identify opportunities faster. For example, tracking the click through rates of your emails – which subject lines and call to action buttons worked the best to result in a conversion?

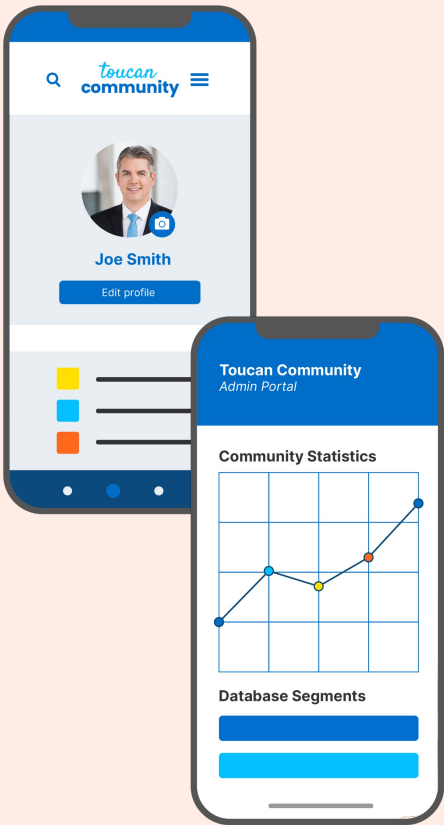
Segment your community & prep launch communications

Soft launch

Pre-launch email to invite ambassadors / influencers to join

Receive & address any feedback

Launch to your whole community



3. Community engagement planning

Building the ideal community engagement experience

Resource is tight, and multiple engagement metrics exist; think strategically about the ones that benefit business and the organisation and focus on encouraging people to take those actions.

If your mission is to connect people, then encourage members to create online profiles, use a directory feature and invite to 'connect' with one another on the platform..

If your vision is to provide insightful resources to community members, then you will want to fill your platform with helpful materials which members can download.

If your goal is to keep people inspired and entertained with content, then you can post different media to your site including photo and video galleries, news articles, events to sign up to & job opportunities.

Draft a dream engagement plan for a superstar community member

You can work out how to encourage people to take the next step, and move through the engagement journey you have planned for them. Making a quick checklist of all the ways community members can engage with you will help you to keep track of how much a member is engaging, what they are taking away from your community and what they can do as a next step.

Community engagement checklist: tick off all these activities to become a community superstar!

- ☐ Updating contact information
- ☐ Joining the community
- ☐ Filling out profile info & adding a profile photo
- ☐ Inviting friends / colleagues to join the community
- ☐ Signing up and attend an event
- ☐ Sharing a first post/comment on the forum
- ☐ Joining a club or group
- ☐ Downloading a resource
- ☐ Updating consent preferences
- ☐ Connecting with people on the directory
- ☐ Opening emails
- ☐ Reading news articles
- ☐ Sharing content to their own social media networks
- ☐ Searching for a mentor/ signing up to be a mentor
- ☐ Sharing a job opportunity / applying for a job on the jobs board
- ☐ Making a donation or pay a membership fee



Looking for your community superstars?

Find the ones who are participating in all of the activities on offer!

Use this insight to invite people to take part in an ambassador or advocacy program, to help raise the profile of your community.



ToucanTech Tip: Build a customised report to count how many community members have completed the actions you're after, so you can see who is responding to your prompts and progressing through your ideal engagement plan.

4. Facilitating community engagement

Generating the response that you want

It's easy to assume that creating an online platform packed with resources and interesting content will result in greater community engagement. However even after a successful launch, community management will play an important role in encouraging people to respond to all of the engagement opportunities you're providing online.

Think about your community like a party

- You invite the people you want to attend (*how can you spread the word & get people excited about joining? Who do you want to be the first to arrive, and help you set up?*)
- When they show up, you greet them and offer them something (*how can you create a warm welcome for every member and offer a gesture of goodwill? Can you offer an exclusive discount, or even just an early sign-up to your next event?*)
- Most importantly, you introduce them to other party attendees and get the conversation rolling between them (*how can you encourage interactions and seed discussions to get people talking? Who do you think would benefit from meeting?*)

Facilitating engagement from day one

Communities thrive on interactions between members – it's what sets them apart from bulletin boards, where people come to receive information and then leave. Below are some times to facilitate engagement in the early stages:

1. Use advocates to create early engagement

It can be daunting to be the first post on a new forum, not knowing who might respond! Round up some of your advocates and ask them to log in daily, posting new discussions and replying to any comments.

2. Create confidence and common ground amongst community members

Joining a community will often bring an obvious common ground, whether its a former school attended, an industry. However, depending on the size of your community it might be helpful to create smaller groups with a narrower interest, such as location, hobby or graduating class. These smaller groups can help some people to feel more comfortable posting, and can make it easier to arrange events.

3. Clarify what you want people to do and when

Make it easy for people to join in by including plenty of 'call to action' signs across your site, for example, using a fundraising panel to share progress and encourage donations. You can also create specific landing pages to direct people to, for example, a form to update their details.

4. Make it as easy as possible for them to take the intended action

Try to make every action one click away from the 'call to action', for example, if sharing content on social media or via email, ensure that it's easy for people to get directly to what they want to see. Single sign on (SSO) is a great way for members to easily access content on the go, without having to log in separately.



"You can't be everything to everyone, so I would tell my younger self to prioritise being something to something to someone. If you can make a lasting impact helping one, two, three, five, fifty alumni (pick your number depending on your resources). If you can be relevant and useful to those individuals and start to build a meaningful relationship with them, then it becomes a no brainer for them to want to eventually give back." Sara Eastwood, Alumni Communities Consultant

5. Creating captivating content

Telling stories that keep people coming back

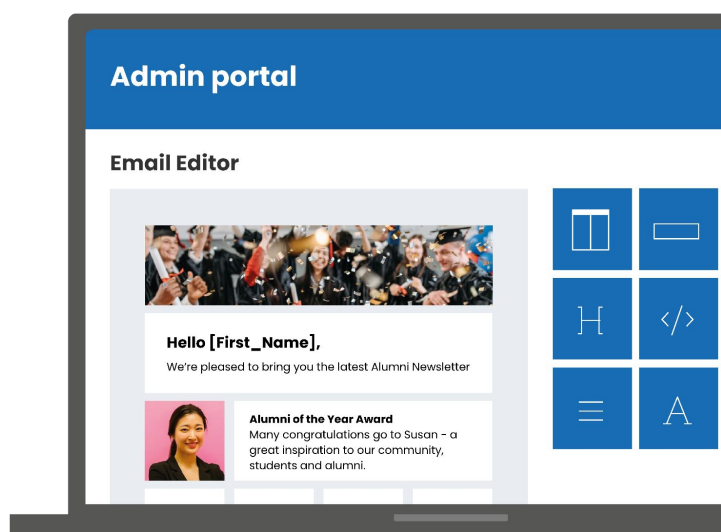
The content on your site will be a major attraction for many members on your community, and a well-populated site will ensure there is lots to interact with during your launch. Using varied formats, such as videos, photo galleries, downloadable resources & on-site articles, is a great way to appeal to your wide variety of visitors.

Create community-driven content

To start with, the focus of your content should be around your community and your members. Keep your ear close to the ground in discussion forums and listen to what your members are talking about, what they're looking to learn or experience and use this as the base

Give your community the spotlight

Your community members should be the focus of your content – so why not hand them the reins and ask them to create content themselves? You can ask for submissions directly from your community, which you can then approve & publish, or create a template for members to submit via a form or email.



"Alumni want to hear about the school – but they love to hear about other alumni! Some of our most popular content has been throwback photos, photos from alumni events and interviews with former staff and students." **Isabelle Blake-James, Director of Marketing, Admissions and Development, St Dunstan's College**



Focus on writing for a specific audience

Trying to write stories that speak to everyone can result in a watered-down version of your content that doesn't directly appeal to any one segment. By choosing a specific audience and keeping them in mind when you write or share resources, you'll know that you're always providing value for someone. For the intended audience, this reinforces the idea that the community they're in knows them & speaks their language.

If you don't know what your audience want to read – ask them!

Promote a quick survey to find out what your audience wants to read about – it's another way for your audience to engage with you and share their feedback, and it can help to generate out-of-the-box content ideas!



ToucanTech Tip:

Share your content in emails with the 'drag and drop' function to easily pull in images, captions & a button from your news articles. You can also share content directly to social media, locked-down so only your community members can log in and read.

6. Moderating community interactions

Creating a positive environment

Ensuring that your community is a safe and positive place is one of the main challenges of a community manager. It's not always easy to predict what might spark debate, and it's important that your members understand the norms and guidelines of your community in order to maintain a positive atmosphere.

Moderating is a fine art, but it can be helped by establishing clear guidelines ahead of launching your community. With digital communities, there are different obstacles to consider, such as anonymity, safeguarding of minors and inclusivity.

Example community guidelines

- *Treat others as you would treat them in real life; **be considerate***
- *Be tolerant towards others' views & opinions; **be inclusive***
- *Respectfully disagree if they differ from your own; **be constructive***
- *Respect the privacy and personal information of others; **be discreet***
- *Communicate with courtesy and civility; **be polite***

Access levels

Depending on your community, you may have minors who have registered to your platform. As part of your safeguarding measures, it can be useful to restrict access to certain parts of your community, such as messaging or commenting. This can be done for communities with minors as online users, at an individual or user group level. You can also restrict content from certain user groups, including news articles, resources, and events, so that multiple user groups can access the same community portal but only view relevant content.

Admin monitoring

Monitoring your community is key, not only to ensure that members are following the guidelines, but to make sure that each member feels included and able to engage with the community. A good moderator will have a deep interest in people & customer service, and will be able to connect with a wide range of people easily. By replying to comments, offering direction to resources and encouraging connections, you can ensure that everyone in your community feels heard and is rewarded for their engagement.

Accessibility

As part of making your community inclusive, you'll need to consider how you can make your community accessible. You could do this by offering your site in multiple languages, sharing user guides on your homepage, and using captions & headings to make multimedia content accessible for all.

Saving time on moderating

By delegating moderating to enthusiastic community members, you can ensure that your guidelines are upheld while encouraging your community moderators to become more involved. Using a platform such as ToucanTech that enables you to assign club admins to run sub-groups of your community.



ToucanTech Tip: Keep certain types of content such as photo galleries behind a log in, so that community members have to register to see event photos or archive content.

7. Personalising everyday engagement

Making every interaction count

Personalising the opportunities you offer people is one of the most effective ways to turn low-engagement community members into community superstars.

Why you should personalise engagement opportunities

People are more likely to engage when the outreach is personal. For associations who offer memberships, engaging more employees from the member company is a great way to impact renewals. For schools and organisations who hope to one day receive donations from their alumni, parent and donor communities, engaging people in the right way is part of the fundraising & stewardship cycle which will motivate them to give back.

Everyone has a different preference for how they like to involve themselves – some love to volunteer their skills to help others, others may prefer to participate regularly in forums and comment threads, some may only use your online community to find ways to engage in person, such as by registering for events. However they choose to engage, it's up to you to adapt and encourage them to take the next step in their engagement journey.

How to personalise through segmentation

Segmenting people by how engaged they are (i.e. how many times they have completed an activity) and what they like to engage with is a key part of managing your members on an individual level.

That's why it's important to be able to easily identify and communicate with your event enthusiasts, avid news readers and featured mentors, and everyone else in your community.

You can also segment based on overall engagement, ranging from superstars to quieter members, and plan accordingly to get them to 'graduate' to the next segment up.

Identify disengaged members early

It's also important to be able to identify warning signs for members who aren't engaging, particularly if they are coming up to a renewal. Using a range of engagement filters, you can find out who hasn't logged in for a while, who has never posted on a forum or commented, or who hasn't made any connections. These are all useful indicators that it might be time to try a new approach with these members – possibly through a survey to ask them exactly what they'd like to see and get out of the community.

How to personalise with limited resources

Personalisation can feel like a way of working that might not be sustainable if you were to do it manually. Here are some more manageable ways to execute personalised comms:

- Use merge tags to pull in personal details such as first name, title, address, class of, and other custom fields
- Set up automatic birthday emails, to deliver a personal greeting to your members on their special day
- Set up automatic club emails to share a weekly round up of club activity with members
- Restrict content, including news articles, events & discussions, to certain user groups, to enable more groups to use the same platform while delivering a tailored experience



ToucanTech Tip: Streamline your data capture to efficiently fuel your future marketing/careers strategies (e.g. if you think a sports-themed event could engage alumni, make sure you are collecting this sports interests consistently in the same field types in your database)

8. Encouraging repeat visits

Giving people a reason to return

With so many distractions, in particular from other social media platforms, it can be difficult to hold the focus of your community members and encourage them to regularly return.

Expectation management

Not all communities need interactions 24/7 – in fact, many people joining communities might be off-put by constant notifications. While it can be tricky to set expectations at the launch of a community, it’s helpful for members to understand that they might see a new piece of content once a week, or a new event every few weeks. Communicate with your members and remind them when a new piece of content is live!



ToucanTech Tip: Publish consistently on certain days or times, so that members will come to expect new content and will log in to check.

Ideas for encouraging return visits

Use the Directory to encourage connections

The Directory feature can be used to ‘Search & Reconnect’ with old classmates, or to find new potential connections with . You can tease results on a logged out page (e.g. ‘91 matches found’), and users can log in to view the matches & request to join their network.

Community-driven engagement

Appeals from your community members are one of the most compelling reasons to sign up to a platform. Members can share a message asking to connect which is visible to logged-out visitors as well as online members. Once logged in, members can search for others by name, year group, interest, location or industry, and can share an email inviting them to join if they are not already registered.

Exclusive discounts

Timebound discounts are a great incentive to encourage repeat visits. You can offer a variety of discounts to members by working with local or industry partners. Encourage people to take advantage of the offer sooner rather than later by creating a timebound discount or free trial.

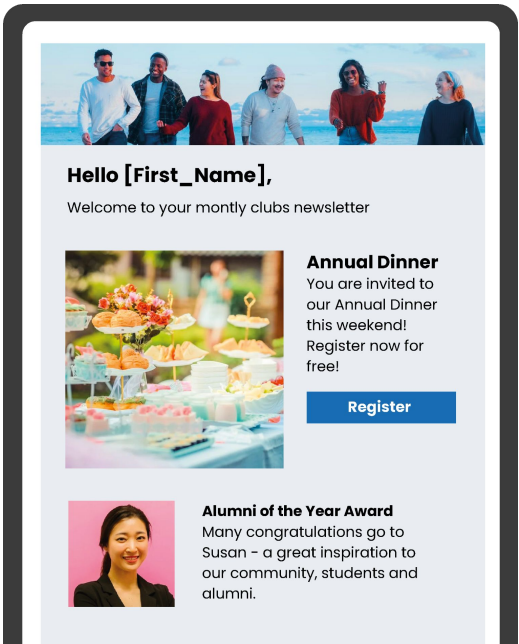
Use social media & email to share new content

Some members may forget to log-in until they are shown new content that they want to access. Share your most popular content via social media and email, with a short teaser or a quick takeaway from the content and a call to action to log in or sign up.

Generating FOMO (fear of missing out!)

Being part of a community is all about sharing moments with other people, so one of the best ways to incentivise engagement is sharing examples of your community in action. Sharing a regular round up of activity – either from specific groups or your community as a whole – is a great way to show members who haven’t signed up yet or logged in for a while what they’re missing out on.

This can be done with minimal input from admins; a weekly roundup of club activity can be sent to club members automatically, and popular articles or events can be ‘drag & dropped’ to quickly populate newsletters, with a link to sign in and find out more.



9. Incentivising engagement

Introducing positive reinforcement

While community members are likely to appreciate the value of belonging to your network, it's likely that they have other commitments and may not be engaging as often as you'd wish.

It can also be daunting for community members to engage on a new platform – some of the social cues when joining a discussion or introducing yourself in person are removed and it can be difficult to ascertain the norms & level of engagement expected. Alongside this, engagement can naturally die down after an initial launch period, so it's important to give plenty of incentives to keep your members consistently engaging.



Gamification

There's nothing wrong with a little friendly competition within a network, especially if it brings people together! If you're looking to raise funds, you can encourage teams or classes to get competitive to raise as much money as they can.

Rewards

Setting up a rewards scheme is a good way to encourage early engagement, by providing exclusive prizes to members with the most points. View your most active community members by using a filter & adding the engagement types you'd like to reward – make sure to share your winners with the rest of your community to encourage engagement from quieter members!

Awards

An awards scheme is a nice way to share recognition from other community members. This could be done annually at an event, or throughout the year. For example, community members could vote on or nominate 'best mentor', 'best club manager' etc.

Variable rewards: What they are and how to use them

Variable rewards are an approach for rewarding your community that hooks members by delivering rewards when they least expect – also referred to as 'intermittent reinforcement'. We're wired to keep looking for the next reward, so surprise perks are a good way to keep your community members on their toes & returning for more!



ToucanTech Tip: Thank your community superstars personally, using their recent engagement as a nice reason to get back in contact. This will help you to strengthen your bond with the individual while also making them feel valued for their contributions.

10. Reporting on community engagement

Metrics that matter

Taking the time to agree on, record and analyse key community engagement metrics will allow you to understand how your community is connecting, and drawing insights from this data can help to pinpoint opportunities.

First and foremost, aim to become so familiar with the engagement rates you’re recording that you can recognise an increase or decrease as soon as you see one, based on having built a benchmark for how your community responds to various touchpoints.

It’s also useful for stakeholders to understand the link between the community and the end goal for your organisation. Often, an engaged community can be seen as a ‘nice to have’ and not integral to achieving the targets of your organisation. By providing stats that link to your overall goals, you can demonstrate the impact of your thriving community. Take a look at some of the metrics below which may be useful to track & share with other stakeholders.

Community engagement metrics

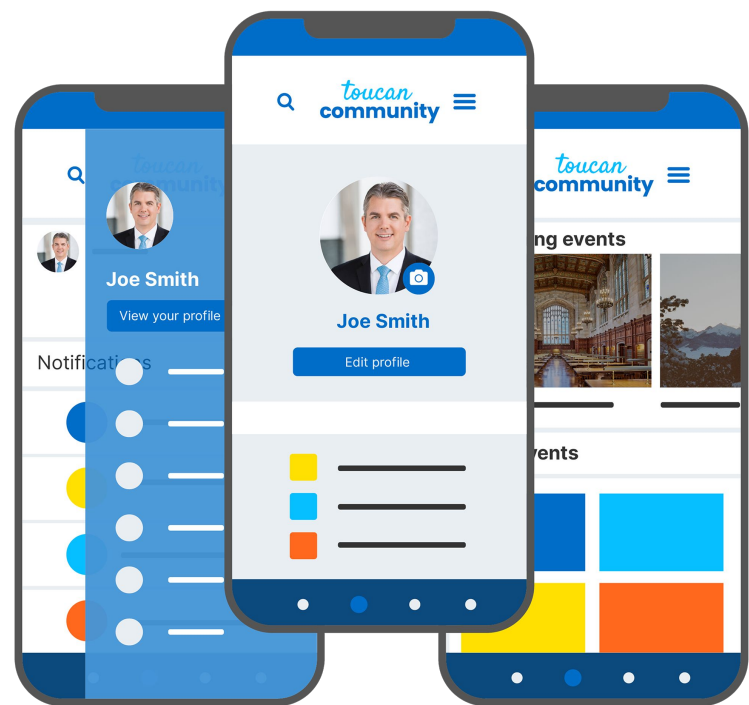
Metric	How to calculate	What it tells you
Number of online community logins per month	No. of logins to the online community platform per week/month/lifetime, divided by no. of community members with an online account	What proportion of people with logins are logging into the platform
Event attendees	No. of event (or webinar) attendees per month/year, divided by no. of community members	What proportion of the community are engaging in-person or via webinars
Forum post rate	No. of posts per week/month/lifetime, divided by no. of community members who have logged in week/month/lifetime	What proportion of your community members with access to the forum are actively posting to the forum, or have done so
Online club membership rate	No. of people who have joined any of the clubs or groups available to them in the online community, divided by no. of people with a community login	What proportion of your community are participating in clubs
Online community sign up rate	No. of community members with an online profile, divided by no. of community members total	What proportion of your whole community has joined your online community
Email open rate: online community members vs offline community members	No. of email opens from people with an online profile, divided by no. of people with an online profile – compared to – no. of email opens from people without an online profile, divided by no. of people without an online profile	If your email open rate is higher with online members, this implies that online membership creates an engagement effect that lasts outside of the online community
Percentage of all donors that have an online profile	No. of donors with an online profile, divided by no. of donors total	What proportion of donors has joined your online community

10 steps for building better online communities

Whether you're involved in managing a community linked to an educational, membership or charity organisation, providing an online platform is a really positive way of driving ongoing connections..

This guide is designed to give you a step-by-step plan for getting to know your community members, right through to reporting on those that are the most engaged.

Connecting this process using an all-in-one system saves time, increases efficiency and boosts engagement.



10 key points to take away

1. **Segment your community before you launch your online platform**
2. **Treat your launch as a campaign**
3. **Draft a dream engagement plan for a superstar community member**
4. **Tell stories that keep people coming back**
5. **Coach people into generating the engagement you want**
6. **Create a positive environment**
7. **Make every interaction count**
8. **Give people a reason to return**
9. **Introduce positive reinforcement**
10. **Report on the metrics that matter**



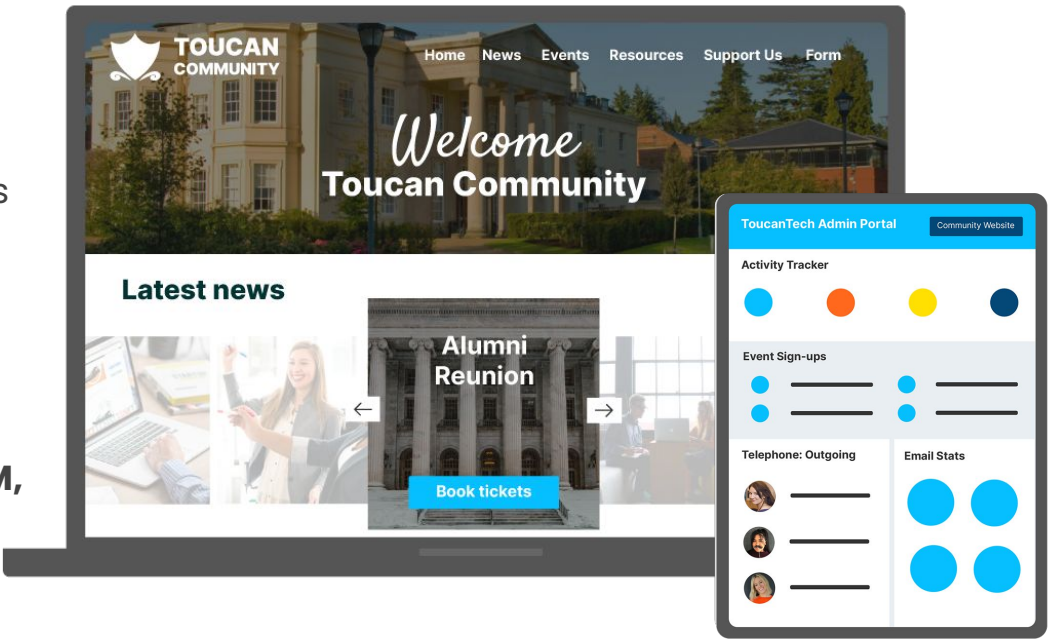
"It has been wonderful to be able to engage with alumni, former parents and staff and to see our online community grow in the last year since we joined ToucanTech. While COVID has been challenging for all of us in different ways and to varying degrees, we have been able to stay connected through our online community."

Daphne O'Connell, Development Director, Summer Fields School

About ToucanTech



ToucanTech is a **community software** used by schools, companies and charities for marketing, membership, alumni, careers, and fundraising activities. Combining a flexible **website** and powerful **database/CRM**, it's an easy, all-in-one system.



Database

Import, filter, update and merge record, create custom fields, forms and admin permissions



Community

Connect your members on a branded network with privacy controls and mobile app



CRM

Track activity, measure engagement, capture consents, create postal labels, sync emails



Groups

Set-up club pages where admins can manage their own members, discussions, events



Email

Design and schedule newsletters, view stats, remove bounced emails, manage unsubscribes



Fundraising

Process donations and tax relief, set up funds, reconcile payments, run reports, steward donors



Resources

Upload photos, documents, magazines – tag, categorise, share and track downloads



Careers

Run a mentoring system, post jobs, publish careers guides, promote business networking



News

Publish articles, videos, and other content – track views, tag people, share on social media



Events

Manage your events (online or in-person), invites, reminders, seating plans and ticketing



"ToucanTech offers us a simple, one-stop-system to manage our website, donations and communications – exactly what we need with low internal resources." **Liz Brown, Trustee, MADaboutART**

"We needed a public-facing website & private members-only pages to host education & training resources, plus member profiles and processing membership payments. We wanted a beautiful, clean & modern aesthetic. Our members are the foremost graphic & creative designers in the world, & we have the same standard of quality as the work that they create."

Kasandrea Sereno, Founder, HigherEdSocial

If you're looking for a better way to manage & engage your online community, get in touch at hello@toucantech.com



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