THECR NETWORK

Creating a Community Playbook

SNAPSHOT

SPEAKERS
Lauren Vargas (Aetna), Rachel Happe & Jim Storer (TheCR)

COMPETENCIES
Policy & Governance

MATURITY PHASES
CMM3

TOP THREE TAKEAWAYS

Implementing a community playbook in an organization is an advanced step in the social media maturity curve. Participants were privileged to listen to a speaker who has had experience developing three different playbooks.

1. **Harmonize the Playbook.** Lauren emphasized the need to harmonize the playbook with existing policies and guidelines. It must complement what already exists, not supersede it. The playbook must speak to those policies, the code of conduct, the privacy policy, etc.

2. **The Playbook is always evolving.** Set the expectation that the playbook is meant to be an ever-evolving document. It is not meant to be a command and control document, but rather a protection document that allows people to feel comfortable having conversations online. That means a flexible structure. It will ebb and flow the same way that conversations ebb and flow.

3. **Conduct personal Interviews.** Lauren recommends conducting personal interviews with all the people who might have access to the playbook or for whom the process will be customized. The reason behind this is because the way that the conversation is mapped, the way that a certain situation is mapped or the way a certain conversation is prioritized may not be the same across the entire organization.

OVERVIEW

1. **Lauren's Background:** Lauren has created two playbooks in the past for different organizations and is currently in the process of developing a third playbook. As Lauren is a sports fanatic, modeling this in the form of a playbook came naturally to her, i.e. a play for each of the different scenarios.

BEST PRACTICES

1. **Follow these 3 steps.** Lauren shared the main steps that she has used to create a playbook:
    a. ***Build a toolkit:*** The policy is the foundation. The playbook requires moving beyond the standard policy and engaging in some interactive modeling. Begin to identify the key decisions and decision makers in order to delve into the play-by-play for the different scenarios.
    b. ***Build a Storyboard:*** The next step is to build a storyboard with workflow processes based on the channel. Let the playbook be channel agnostic, but still follow through from a workflow perspective.
    a. ***Develop Filters:*** Lauren stressed that the listening strategy must come before the tool/platform selection. Furthermore, it must be aligned with the playbook actions. This includes defining what the organization considers to be a relevant mention, which will also help to prioritize conversations (i.e. complaints, compliments, inquiries, leads, opportunities, etc.)

2. **Understand that the Playbook is Meant to be an Ever-Evolving Document:** Lauren stressed that in her experience (regardless of whether or not she has built the playbook for a regulated or non-regulated environment) the playbook is not meant to be a command and control document. Instead, it is a document that is meant to set up guardrails where people feel comfortable having individual conversations online.

3. **Make Personal Interviews Part of the Playbook Process:** Lauren recommends conducting personal interviews with all the people who might have access to the playbook or for whom the process will be customized. In other words, it might be the same story, but told through a different workflow. That is why it is important to understand what that means for the listening strategy and what that means for the filtering and prioritization process in order to identify the proper action before building out the listening grid.

4. **Ensure that the Playbook Structure has Flexibility:** The playbook must be able to ebb and flow as the conversations ebb and flow. Conversations do not happen in a silo and they do not happen in just one particular channel. It is the community manager's responsibility to understand how these

LESSONS LEARNED

- Rachel asked Lauren to provide a concrete example of a workflow for a typical scenario. Lauren replied that she always starts out by defining a relevant mention. In other words, not every company mention needs a response, but every single mention requires an action.
    - Understanding the conversation stream helps begin the mapping process. This includes understanding all the various tones of the conversations. A great resource at this stage is the company call center (if applicable). Ask the call center how they classify and tag information. This helps with the conversation classification process, especially if there is a CRM system involved. For those members who are managing internal communities, this step might involve a tagging infrastructure and topic taxonomy instead of a CRM/market segmentation tag.

- Lauren stated that it is important to align the workflow process with the organization's business goals and objectives, but to also include the organization's mission, vision and values. What is acceptable in one culture may not be acceptable in others (i.e. posts of a more personal nature on a corporate account). It comes back to the interactive modeling process. Once those conversations are identified, it is easier to attach examples of how it relates to the manner in which the company wishes to act (either passive or active engagement).

- Rachel has observed that workflows are critical for marketing or support because the actions are seen in the public arena. However, even though it is not as important to have these workflows for internal use, it is still a good idea because it helps to manage the surprises that can occur because of a lack of forethought.

- Lauren was asked her thoughts on using automation in the design of workflows. Lauren believes that there is a place for automation if it can help filter the data and allow for better response times. However, Lauren is a firm believer in human interaction. So, while she believes in the rules and processes behind the scenes, the actual engagement cannot be automated.

LESSONS LEARNED, CONT.

- Lauren was asked how she ties the playbook to metrics and, specifically, which metrics she uses. Lauren replied that she has developed what she calls a "Community Health Index". Basically, all of the different elements that she has discussed belong in four different pillars or classifications of community interaction: brand engagement, industry engagement, content curation/creation and internal engagement. Each pillar has 3-5 metrics, all with different weights that average together to give that pillar a score. Each pillar has a separate weight. When averaged together, it gets an overall Community Health Index. This allows for a macro view and a micro view of the health of a community.

- Lauren was asked to clarify her definition of "macro". She replied that it does not refer to the external response, but rather how the organization deals with large volumes of the same type of conversation. In other words, how a particular conversation is tagged and classified to ensure that it is routed to the right person at the right time without needing to complete a process workflow for every single mention. A reference section, information about community management and an outline of the desired best practices, tones, etc. should also be included.
    - Rachel also asked about a governance model because to do something like this would require a great deal of coordination with all the departments involved. Lauren replied that that is one of the evergreen elements of the playbook.

- One participant requested to visually see a completed playbook. Lauren pointed participants to the Radian6 website. Check under the "Resources" tab.

- Another participant asked how Lauren is able to keep the playbook simple enough to be digested by all audiences, yet include the level of detail needed. Lauren responded that it does turn out to be quite a lengthy document, but it is essential that it is visual. Lauren explained that she does add a lot of details that people can consume on their own time, which they usually do as they mature into the space. In the beginning, though, it is very a visual workflow, i.e. "If this happens, do this."

ADDITIONAL INSIGHTS

Rachel asked if any of the members on the call have or are thinking of creating a community playbook for their organizations:

- Many members responded that they have social media guidelines, policies and/or a strategy in place, but nothing as formal as a playbook.
- One member shared that his company recently developed a handbook for their member societies, as well as an internal handbook for employees specifically regarding the use of Twitter.