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Best Practices for Welcoming New Members into your Community

📷 SNAPSHOT

SPEAKER
TheCR Team

COMPETENCIES
Community Management

MATURITY PHASES
CMM1, CMM2, CMM3

SUMMARY

1. As an overall summary, welcome programs fit into a broader strategy that helps to build and strengthen the community.
2. Communities with new member programs had a higher overall percentage of their users who were active in the community vs. those without programs.
   a. Ted McEnroe used a party analogy to describe this concept. If someone goes to a party and is not welcomed at the door to help him/her feel more comfortable, this person is less likely to immediately take part in conversations with others. Greeting people and setting a tone of expectation creates a level of intimacy and friendliness that helps drive engagement.
3. The research suggests that the more personal that the welcome program can be – either with personalized calls, personalized emails, personalized video tours, etc. – engagement was higher. Additionally, those communities with the above best practices also had much stronger levels of user-generated content overall. Therefore, the human piece really does matter.

Overview

The highlights of the discussion are noted below:

- **Welcome Programs are a Key Feature of Mature Communities:** The 2015 SOCM Report revealed that there was an increase in the percentage of communities at higher levels using new member programs:
    - 31% of Stage 1 communities offered new member programs. That increased to 49% for those communities in Stage 2 of their maturity.
    - For communities in Stage 3 maturity, that number jumped from 49% to 82%. Therefore, communities that scored in Stage 3 or 4 overall were more than 1.5 times as likely as Stage 2 communities to offer new member programs.
    - What this means is that welcome programs were a part of the more mature communities. Looking at the data across the other competencies, it also points to the fact that welcome programs correlated with a number of other maturity markers.

- **Welcome Programs Correlate with Other Maturity Markers:** New member welcome programs correlated with having:
    - An approved community strategy.
    - Approved and resourced roadmaps.
    - Formal and multi-tiered advocacy programs.
    - Approved crisis plans.
    - Community playbooks.
    - Members who contribute to strategic planning.
    - Guidelines that promote good behavior and discourage bad behaviors in the community.
        - In summary, welcome programs fit into a broader strategy to build and strengthen the community.

- **Welcome Programs Strengthen Engagement:** Welcome programs correlated with stronger engagement in the community:
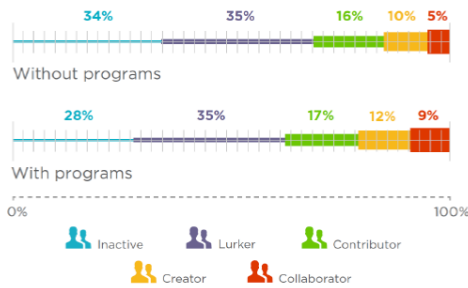
Figure 1 - Welcome Programs Strengthen Engagement - Slide 6[1]

- Communities with new member programs had a higher percentage of their users overall who were active in the community vs. those without programs.

- Ted investigated further to understand if there was any other correlation in terms of smaller communities or larger communities and if there were any community structures that could lead to increased engagement. There was not any correlation. New member programs were not an aspect of large communities vs. small communities or vice versa. It was spread across the overall community spectrum.

- Ted uses an analogy to describe this concept. It is like going to a party. If someone goes to a party and is not welcomed at the door to help him/her feel more comfortable, this person is less likely to immediately take part in conversation. There are some exceptions because some people are naturally social. However, in general, greeting people and setting a tone of expectation creates a level of intimacy and friendliness that helps drive engagement.

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1 All slides used with permission from TheCR for the call entitled: *"Best Practices for Welcoming New Members into your Community"* on June 24, 2015.

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- **Most Common Welcome Programs:** Ted explained
  that this data was not in the initial Report, but he wanted to understand which types of programs
  were most common in communities that had new member programs:
  - The "Getting Started Guide" was almost universal. More than 80% of the communities
    with new member welcome programs had getting started guides.
  - Approximately half of those surveyed had an automated welcome email.
  - Slightly under half of those surveyed had a personalized welcome email.
  - About a third of those surveyed had training available for how to use the community.
  - About 1 in 5 (20%) of those surveyed conducted video welcome tours.
  - Only about 1 in 10 (9% specifically) conducted individualized welcome calls.
- **The Less Common Tools have the Most Impact:** Interestingly, the less common tools were
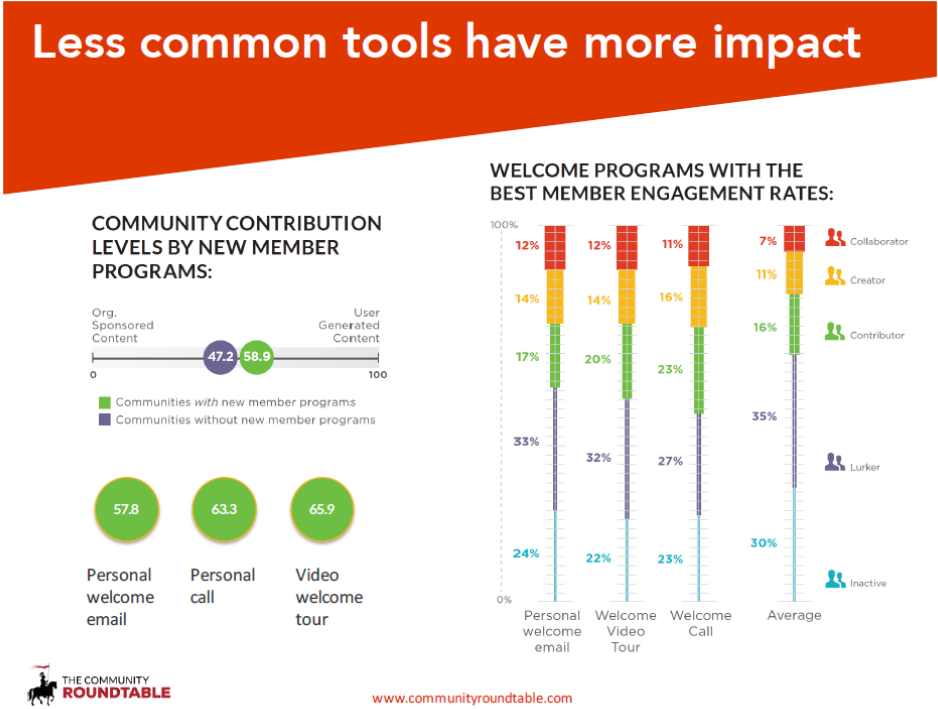 the tools that typically had the most impact:

Figure 2 - Less Common Tools have More Impact - Slide 8

- The more personal outreaches, such as a personal call, were able to move the needle in
  terms of more members becoming engaged. Therefore, there was a correlation that
  suggested that new member welcome calls and those that had the most active

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members from a percentage standpoint did so because of these new member welcome calls.

- The chart on the right-hand side of the slide looks at the three more human approaches, i.e. the personal welcome emails, the welcome video tours that put a voice or a face to the message and the welcome call. These humanized approaches obviously created a one-to-one connection, which served to drive higher member engagement rates in the community as a whole.

- The chart on the left looks at the community contribution levels for those communities that have new member programs vs. those that do not. The green dots are for the communities that had the new member programs. What the research indicates is that the organization typically relied more on user-generated content than those communities that did not have welcome programs.

  ▪ When Ted looked deeper into the engagement impact from the individual programs, he noticed that the personal welcome email did not necessarily move the needle that much. On a scale of 0-100 where community managers estimated that their communities fell in terms of organizational content vs. user content, overall it was about 59%. For the personal welcome emails, it was 58%. However, those communities that conducted personal calls or video welcome tours had much stronger levels of user-generated content overall.

- **The Human Piece Matters:** The overall conclusion from the research data is that the human piece matters. The human connection in the member welcome programs makes an impact. The data suggests that the more humanized the approach, the more likely the engagement.

  - Ted tried to set up parallels between the more human approach and the more automated approach. Looking at the statistics for personalized email vs. automated emails, there are higher engagement levels that correlate to the personalized emails. It creates a personalized connection. The same is true with welcome calls vs. the getting started guides. The welcome call creates a one-on-one connection; a human voice that connects to the community for the member. Not surprising, it also correlates with higher levels of engagement. The same holds true for the video welcome tour vs. the welcome webinar. The welcome tours – if they are more personalized and/or if there is a human face in it vs. just a webinar of screen shots – create a connection. That kind of content can offer members that face-to-face feeling that creates more intimacy within the environment of the community.

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Best Practices

The following is a summary of the various best practices that emerged from the discussion with members:

- **Consider the Three Key Recommendations of the SOCM 2015 Report:** The three key recommendations from the Report were as follows:
    - *Define your community's value*
    - *Build a new member welcome process*
    - *Invest in community management and coaching*

- **Include New Member Programs as Part of the Community Management Strategy:** Ted pointed out that new member programs fell under the SOCM Report's key finding #3: "Quick wins exist to include engagement." What was revealed in the Report was that new member programs have an immediate impact on engagement. For those communities that do not have such a program, this could be considered a "quick win" in that it offers a fairly easy opportunity to help engage new members.

- **Implement Practices to Help Scale New Member Welcome Programs:** Georgina asked members to share how they scale their new member welcome programs:
    - One member shared that she currently works in an environment with 5000 members, but has worked in an environment that had as many as 45,000 members. The latter community was an internal community that could not manage personal welcome messages. What they did in that environment – and what this member will likely do in her current environment – is personalize the new member training in as many ways as possible to the role, use case, persona, knowledge and expertise of social media in general. This way they can try and make it feel targeted specifically to the individual.
        - ▪ Another best practice that this participant would like to implement is a champion program/advocacy program. That is also a way to potentially help scale new member programs, i.e. call upon these champions/advocates to help personally welcome new members into the community.
    - Another participant explained that in his internal community, they have about 200 to 300 new accounts per week on the platform. That does not lend itself to individual calls, but their system does send out an automatic welcome email the moment the new member joins. Additionally, the next day the new member will receive an individual email from either this member or his colleague. They created a utility that looks at all of the accounts that have been created since the last time the email was sent out the day

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before. They then send an email that tells the

member about the community, the easiest ways to use it, what it is best used for, points, webinars, recordings of previous webinars, FAQs, other resources and links, etc. That is all included in the welcome email.

- ▪ In terms of welcoming the individual to the company, this participant has a good partnership with HR. They have been in contact with these new employees to help on-board them since the offer letter went out. That consists of a period of two to four weeks ahead of the new hire's first day on the job. On day one of their employment, HR invites the new hire to a welcome group in the internal community. There are three people who share that responsibility for that particular group from HR. This participant shared that this approach works very well.
- Jim added that he has applied a technique for launching communities and welcoming new members that was highlighted in the data from last year's SOCM Research. It is the concept of executive engagement vs. executive endorsement. Much of the work that TheCR has done with companies that have launched new internal communities involves one-on-ones with executives to not only train them on what the community is about, but to help them get to that "AHA" moment so that they understand the value of community not just to the organization, but also how it can help scale them and how it can help replace what they do today with community activities tomorrow. Jim believes that that is an important piece of welcoming new members, i.e. thinking about the different layers of the organization and how you might want to welcome them differently. A lot of the line employees might have a certain process, but executives will respond better to a one-on-one experience.

- **Consider Delivering "Bite-Sized" Chunks of Information:** One participant explained a best practice that he learned from his digital marketing background. For his current position he has created an auto-responder sequence that incrementally sends out bits of information to a new member as part of the on-boarding process. This has been very valuable because when anyone starts at a new organization, it is like drinking from a fire hose. These smaller bits of information help the new hire to gain insight about the company, but not in a way that is overwhelming.

  - In order to gain a baseline figure, this participant will send them a small survey of 10 questions that gives them an understanding of their current knowledge. Then at the end

of the year another survey is sent. This offers insight into how well employees have increased their knowledge and understanding of their membership and its resources.

- The second email invites the new hire to a new member webinar, which is conducted once per month. With that comes a deluge of information on the webinar, but it is an invite that gives them access so that in time they will understand the tool as a resource. This participant's organization uses a tool called: "Mobilize". It is not well-known, but is very effective for this participant's community.

- These emails last for a series of 14 days. At the end of those 14 days, the new member has been offered many resources, but it has been spread out over a short period of time vs. all at once.

  ▪ This participant stressed that the program does not have to be fancy. His program is grassroots and simple. They use Constant Contact.

  ▪ The last thing that is put into the emails is some type of imagery that conveys warmth, like a smiling human face. It helps people to feel that they belong in a safe and open environment.

- **Consider the Use of a Welcoming Committee:** In order to help engage the existing community to participate in the welcoming process and begin facilitating community bonds, participants threw out the idea of using a welcoming committee:

  - One participant thought that it would be a great way to build relationships among members. When she introduces people in the "real world" to help form connections as a way to help each other, she always gets permission first, especially when it comes to customers. The same should apply to community connections.

  - Another participant felt that this was an opportunity to use champions as part of a welcoming committee because they have already given their approval to be contacted. To help facilitate this, this participant will list the champions with information that shows their department, their location and their skills and expertise so that people can reach out to these champions on their own.

  - Georgina added that it also depends on the community. When she welcomes new members to TheCR, she will offer to make introductions based on specific topics of interest, etc. That is the goal and everyone has the expectation that the introductions made will be mutually beneficial.

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- **Think About Adding Gamification to the Welcoming Process:** One participant said that he heard of a community that used gamification as part of their welcome process. This community had quite an elaborate set up in which new members were given X number of points if they completed various welcome documents and/or videos. The community manager that used this gamification method felt that it was an easy way to welcome members.

- **Include Personalized Information in New Member Profiles:** As explained by one participant, they send out an annual survey to members and one of the questions on that survey is how well people feel known within their community. This particular question receives the lowest rating of all the 24 questions. If people do not feel known in the community, it impacts their willingness to participate in the community. Therefore, to help people to feel better known, this participant has offered new ways for members to update individual profiles, such as uploading a new profile picture or posting favorite traditions around the various holidays throughout the year. This receives a good response and has helped the question move a little higher on the survey.
    - Jim added that they also use a question on TheCR profile to help highlight a member's personality beyond their job duties. It is a question along the lines of "What would people learn about you over a cup of coffee or a glass of wine?"
    - Another participant added that they do this in their profiles and it acts as a bit of an icebreaker when people contact her. She added that it might be worth looking into being able to search by common interests, i.e. people who went to the same schools, studied the same degrees, have the same favorite sports teams, etc. This could also help people to connect and feel more comfortable about reaching out to others.

Lessons Learned

The following is a summary of lessons learned as shared by participants within the discussion:

- Participants discussed a concern that they had about fatiguing the 1% of super active users:
    - Jim felt that that gets into mentor programs and/or reverse mentoring, i.e. pairing an executive with a Gen Y newbie.
    - Another participant shared that it is important to ensure that the new person – through the welcome introduction – be made aware that the subject matter expert connections are there as only one resource. Stress that there are many online resources that also exist, as well as others in the community.

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▪ Along this same thread, the participant who shared his 14-day welcome process was asked he ever received any backlash from the email cadence, i.e. that it was too much. This participant explained that he has done this for two years without any complaints. As a matter of fact, he plans to eventually add a 30-day and 60-day check-in email to the series. This will act as a measurement of the effectiveness of this overall process because it will be a checkpoint as to whether or not the resources have been communicated and used.

- The question was asked as to the email open rate of the participant's 14-day welcome process. This participant replied that their engagement is about 37%, which is not perfect, but it is a pretty good number given the open rate on other emails that they send.

- Participants discussed video welcome tours, particularly in light of the research data disclosed in this year's SOCM Report:

  - One participant uses videos as part of the training for the various tools that the organization offers. They try to make it fun, friendly, quirky and humorous. However, this call has this participant thinking about adding a personal welcome call.

  - Jim felt that for the welcome tour data in the survey, the responses must have been canned because personalized video tours are not scalable. The one area where they could be more personalized would be for executives.

    ▪ Ted was asked to clarify the data on this point, wondering if the video was of someone personally conducting the video or if the video was a tour of the site. Ted replied that unfortunately they did not differentiate. He believed that it was probably a mix of both types. For those best-in-class communities, it looks like they might be doing a little bit more, but not substantially more. Ted believes that it will be interesting and worthwhile for TheCR to explore, i.e. what is the difference between a good video tour and a bad video tour, etc.

- Georgina asked if anyone uses an automated welcome process and/or if they at least had an automated welcome component as part of their welcome process. One participant replied that they use a standard group email that they send at the beginning of every month. This was partly inspired by TheCR's weekly "What's Happening" email. This participant would like to add a section that includes a list of new members, much the same as the way that TheCR does it. This helps the email to be more multi-purposed.

- Jim asked members to share any ideas that did not work and were, therefore, quickly ditched:

- One member shared that she is going to ditch her lack of reaching out.
- Georgina stated that she and Hillary used to welcome people from the same organization together as opposed to individually. Georgina and Hillary quickly decided that that was not a good idea for the member on-boarding process because they found it very difficult to get individualized information. Sometimes there was an unwillingness to talk, especially if there was a senior member of the team on the call. Other times, if one personality was more dominant, he/ she would take over the conversation. This did not allow TheCR to reach its goals of welcoming new members and getting to know them better. Therefore, the idea of a combined interview was ditched in favor of individual welcome interviews.

• One participant asked for examples or use cases for a short video, i.e. what works best. Jim replied with a use case he is working on currently with a client. The video is used for orienting new users on how to use a community. They typically use screen captures to walk through a specific behavior in the community, such as updating a profile, posting, etc. Jim recommends keeping the video short, one to two minutes tops. The first screen should be the person speaking, followed by screen shots of the platform with an audio overlay.

Resources

• As mentioned in the chat: https://community.jivesoftware.com/videos/8795
• As mentioned in the chat: https://d13pix9kaak6wt.cloudfront.net/background/angus.nelson_1307725566_53.jpg