



MemberWise

cantarus



THE ULTIMATE GUIDE TO ONLINE MEMBER COMMUNITIES

A MemberWise Network Best Practice Guide

The Ultimate Guide to Online Member Communities

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We are delighted to refresh and expand this overview of online community for membership bodies with our trusted partner, MemberWise. Technology moves fast, and we always value opportunities to help sector leaders keep a finger on the digital pulse. Cantarus serves dozens of membership bodies of all sizes with technology services and consulting with websites, mobile solutions, integration, hosting, consultancy and, of course, online community.

Our community offerings span a number of leading platforms and strategic partnerships. The MemberWise Network App – available to all MemberWise members on both **Apple** and **Android** app stores – is an excellent example of an integration with one of the excellent community platforms we work with.

Beyond the technology, Cantarus offers the experience and knowledge to lead successful online community projects in the membership sector. Mark Eichler, Cantarus' Principal Consultant leading on online community, has worked with dozens of membership bodies in adopting and optimising their online communities through direct consultancy and product development in the US and the UK. This document, for which Mark is the primary author, reflects his insights from the earliest days of community platforms serving the sector in the mid-2000's.

We look forward to continuing conversations on technology in the membership sector. Please feel free to reach out to us directly or via the vibrant MemberWise community.



Lee Adams

Chief Executive Officer



Mark Eichler

Chief Product Officer

Introduction

We all know what a **community** is – a network of people who connect around shared characteristics, purposes, and/or goals. In the membership sector, community is at the heart of much of what we do and participating in a community of peers is vital to the member value proposition for current and potential members.

An **Online Member Community** is a digital platform, ordinarily managed by a membership organisation, to facilitate members interaction with each other and the organisation primarily via the internet. Online community platforms are adopted to facilitate the core missions of membership bodies through rich engagement and management tools. This guide details the options and merits of online community platforms fit for this purpose specifically within the membership sector. Delivery of Online Member Community is not a typical “tech project” as offering human connection and personalisation can have a significant emotional element. Community platforms allow for nuanced configurations and user experiences sufficient to reinforce and reflect the personality and culture of a membership body.

Like most technologies within a competitive landscape, the online community platform space is alive with innovation. This is especially true for the platforms and solutions providers serving the membership sector. Traditional players are offering new features, capacities, and updated style/branding options while newer entrants to the market are offering some fresh approaches.

What

An online community platform will offer the kinds of experiences offered in public social media platforms, but with additional features for security, integration, and management of the users and content created. With conversation functionality at its heart, online community platforms offer richer engagement experiences for nuanced conversations and engagement options to users. Platform administrators have the tools to manage the review and manage the conversations and content toward community value and standards.

Where

Online community experiences are provided through the browsers, phones and email platforms of its users – typically a community platform will support experiences all three of these platforms. An online community platform will have a central website and/or desktop/mobile app presence with email summaries and updates.

How

The focus of this guide is on utilisation of an online community software platform. This marketplace is robust, with dozens of products, price points, modules, and opportunities for integration and customisation. Having recognised the value of online community experiences, several CRM and CMS platforms offer a community feature set either directly within the core product or as a module or extension. These range in general quality from raw to fully formed.

Why

Online community is brought forward to facilitate the engagement of members with each other and with the staff of the organisation. This can be broad, such as an all-members forum, and/or to address specific organisational goals.

// An Online Member Community, ordinarily managed by a membership organisation or association, facilitates direct members interaction – with each other and the organisation – in online environments. //

Participant Benefits (including staff participants)



Knowledge
Creation/Access



Human Connection –
Relationships



Programme/Project
Participation

Facilitator Benefits



Insight into
Member
Sentiment



Data
Collection



Revenue



Support Cost
Savings



Marketing Impact

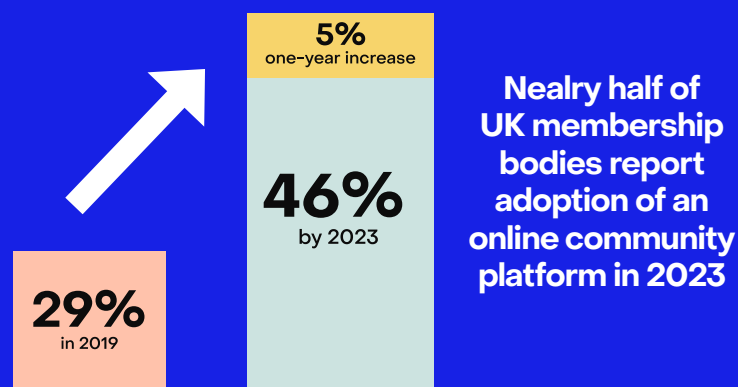


Content
Development

Community Adoption in 2023

The metrics confirm that membership bodies are responding to the community opportunity like never before. **The Digital Excellence (2023/24) Report** confirms that online community platform adoption continues to rise in the UK and Ireland membership and associations sector.

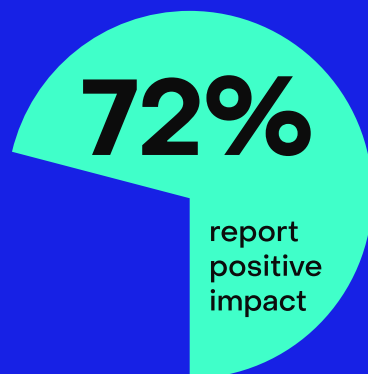
46% of membership bodies in the UK confirm adoption of a hosted community platform by 2023. This is up from 29% in 2019 and with 5% total increase in the last year alone. The vast majority – near 70% – of membership professionals surveyed agreed or partly agreed that their online community “Has had a positive impact on member value” (this figure includes those who utilise Facebook or other public social media platforms).



Community Benefit in 2023

The **2023 MemberWise Digital Excellence (2023/2024) Report** further confirms membership bodies are seeing value from their community investments..

The vast majority – over 70% – of membership professionals surveyed agreed or partly agreed that their online community “Has had a positive impact on member value (this figure includes those who utilise Facebook or other public social media platforms).



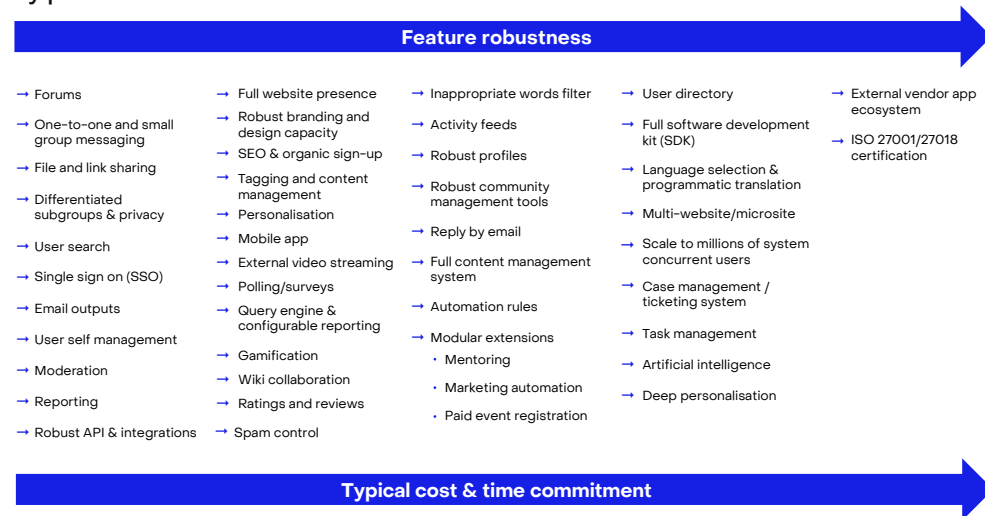
Community Application

In the membership sector, online community is applied to meet numerous business needs. These can include:

- **Questions and Answers**
Online community facilitates answers by knowledgeable peers with reputations established by title, employer and other confirmed attributes. Answers to questions on professional practice and workplace dynamics are highly valuable.
- **Content Circulation & Comment**
Offering members new content of professional value through online community facilitates member comment and prompts further sharing of related information by members.
- **Region, Section, Committee and Interest Group Management/Participation**
Dedicated private spaces reflecting the organisational structure of a membership body are common. Local administrative rights allow chairs to run and manage their groups.
- **Member/Customer Endorsement**
Members who love their organisation use the community to endorse their member benefits. “Customer advocacy” features facilitate programmatic rewards and recruitment/management of member advocates.
- **Knowledge Creation**
Users contribute what they know, discuss approaches, and create documents and content reflecting consensus, including through wiki-like versioning features.
- **Learning “Classrooms”**
Where the learning objectives are light – such as, watch a video, answer questions, discuss in a group – online community may fill learning requirements directly or with an integrated learning platform.
- **Programme Management**
Several common programmes are a good fit for being served through online community platforms. Mentoring is an example of where some community products offer a specific module for this purpose.
- **Event Registration and Participation**
A number of community platforms offer event registration within the context of community. Utilisation of video from conference presentations, file sharing and private spaces for registrants facilitates pre-event and post-event-experiences.
- **Networking**
Members seeking other members to connect with, including through a faceted directory allowing peers to be found by employer, location and interests, are common.
- **Sense of Belonging**
Emotional impact drives value for many community participants. Utilisation of community for new member onboarding and welcoming is standard.
- **Marketing & Lead Generation**
Opening a subset of online community conversations and resources will allow Google and similar search engines to offer insight into the quality of member-initiated conversations and content.
- **Member Sentiment Assessment**
Data and reporting as to emerging professional challenges and trending topics are augmented by polling and survey tools that can offer “finger on the pulse” insights for leadership and staff.

Online Community Platform Features:

Bringing forth the right mix of platform features is a vital part of platform selection. More features typically equates to more expense, but this can vary by platform.



TOP TIP:
Comparison of features to over 20 community product vendors of all sizes is well-facilitated by the London-based Feverbee community consultancy on their website:
www.feverbee.com/community-platforms.

Community Feature Enhancements – 2023 Update

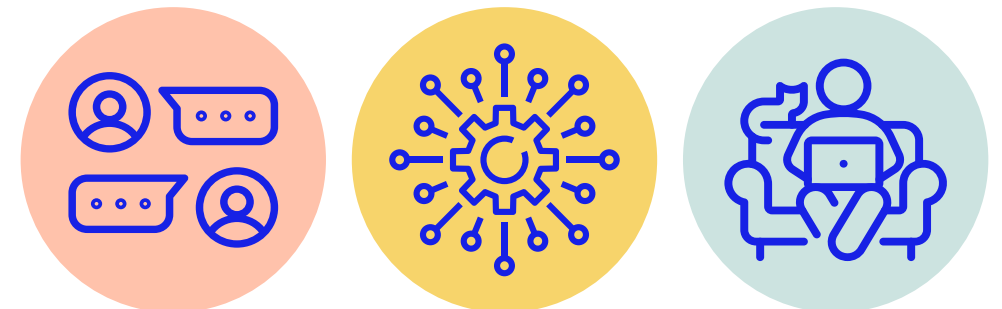
Product feature evolution for established platforms include further progress bundling features like chat into community products.

The largest players specialising in serving the membership and association sectors are continuing to progress integrations with email marketing platforms, enhancing content management opportunities, and even adding customer relationship management tools targeting smaller organisations. New solutions providers offer to empower members to define the spaces in which they network and engage. Facilitating smaller spaces in-addition-to / rather than having the community spaces determined by the organization.

A number of mobile first solutions are being brought to market facilitating traditional social media experiences without the sacrificing of member/user data to the largest multinational corporations. The UX principles established by platforms like WhatsApp, Facebook and Reddit are applied to private environments within the smaller spaces of mobile devices.

Artificial Intelligence Features - 2023 Update

But perhaps most compelling product additions in the online community sets space are with the adoption and utilisation of AI features directly within the community platform products. In the past, it was more common for external AI platforms to be utilised with integrations. In 2023 we are seeing AI features within the core community products themselves with no dependency on additional licenses. These new AI-based features may benefit both the providers of the community spaces and the participants in the community. Sentiment analysis and enhanced reporting are among new features allowing community sponsors to better understand the “what, why, and what next” the behind the conversations. Members and users are benefiting from more nuanced prompts to continue reading similar content. Perhaps particularly valuable in communities serving membership bodies are tools assisting with the writing posts. The additional confidence in presenting well-formed content to peers may boost volume by those sensitive about their writing skills.



Business Case for Online Community

Reinforcing interpersonal connection as central to the membership body's offering enhances the emotional connection with the organisation and the peer group to which it provides access.

The goals and KPIs established for a membership body are recommended to be numeric targets aligned with business goals on member value and revenue. Online community is an investment that should realise financial gain from such areas as member join/renewal, creation of new knowledge, increased purchasing through event registrations and other products, and saving of staff time.

The following metrics are common key community KPIs in the membership sector:

- **First-time posts by individual users**
- **Number of questions / questions answered**
- **Renewal rate of community-engaged population vs. non-engaged**
- **Total population of members that know there is a community or find it useful**
- **Total membership renewal rate post community launch**
- **Volume of content – posts, documents**
- **Percentage of members performing initial login**
- **Total engaged population (multiple/regular logins)**

The population of users who login to the website is often 5% to 15% of total population.

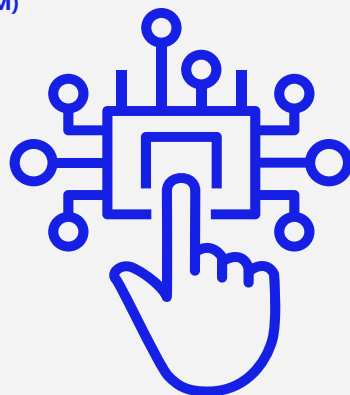
Online Success Stories from the Membership Sector

Chartered Institution of Wastes Management (CIWM)

Annual Turnover **£3-5 Million**
Members **5,000 - 10,000 Members**
Staff **20-50 Staff**



CIWM adopted online community as a matter of urgency in response to the pandemic. Within a month of project initiation the CRM-integrated community was launched and engaging members and offering organisational staff new tools and enhanced efficiencies.



// I had no idea that there would be such value in this platform. The biggest thing that struck me is that we are suddenly able to do – both us and our members – things that just a few weeks ago we could never have done. //

Paul Sloggett,
Marketing Director, CIWM



Community Strategy

Online community will optimally be adopted to address specific needs of members. This strategy will utilise metrics for quantifying success against the targeted business needs and use cases driving the initial investment. Competing online environments such as external social media will be considered with a potential goal of transitioning external conversations to the community. Goals achieved allow additional goals to be added to the strategy, with evolution anticipated. A budget for the community project would include anticipated software fees, staffing needs, future enhancements and potentially physical rewards for community participation.

In determining a community strategy, it is vital to acknowledge that attempting to secure all potential points of community value immediately may impede initial adoption. The establishment of immediate value in a readily understandable online community presence is often recommended for initial launch. Online community platforms facilitate rapid iteration in standing up new community areas, consolidating areas, merging conversations, etc.

While the initial launch of an online community is an important event, it is not make-or-break. Community value is directly tied to the quality of content in the community. For this reason, an initial partial launch to community-advocate members and pre-seeding the community to address known informational gaps are recommended best practices.

Each membership body has its own culture and sense of self. Best practices for community strategies – both for launch and longer term – are optimally conformed to the unique attributes of a membership body.



Should I build from scratch?

Community platforms are feature-dense and offer nuanced engagement for professional benefit and even emotional response. Community products and open-source solutions are recommended as the starting point for deeper customisations when needed.



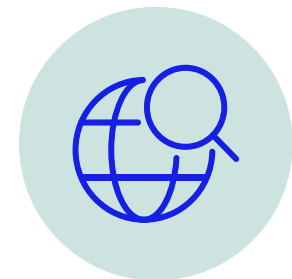
Why not use public social media?

For membership bodies, public social media is a vital channel for outbound marketing. It is rarely optimal for directly facilitated member collaboration and engagement. Managing access just for paid members is a real challenge. Some members will be unwilling to share sensitive professional or personal information.

Community Strategy Evolution

A number of the leading thinkers on online community are noting – and driving – a trend towards online committee platforms as being less a silo of experience and more as an omnipresent opportunity for engagement.

In this view, community content and opportunities to post are anticipated by users; peppered across the digital environments presented. As such, committee platforms utilisation for comment and sentiment sharing across blogs, documents, events, and other kinds of digital website content are finding more of a footing.



Community Data & Analytics

Metrics generated by online community use are seen as especially powerful within the context of understanding and gauging the value of member benefits delivery. Further, community data can be used to discern interests and deliver more nuanced content to individual members.

However, these opportunities are not being seized in the UK membership sector. The Digital Excellence (2023/24) Report notes incomplete integrations across the tech stack as a consistent shortcoming within the sector. Optimisation of community data integrations lags similarly to more conventional centers of value for CRM/website/CPD platform integrations in facilitating personalization and scoring.

Adoption and Launch

Ten steps to initiating your community journey would include the following:



Community Management

Community management is now a professional discipline onto itself. Within the membership sector the community manager function is often provided by staff without a technical background. Successful practitioners have excellent “soft skills”, volunteer leadership capability, fluency with external social media platforms and the community platform(s) managed, and a good “data sense” to recognise trends and opportunities for engagement and reporting to superiors.



It is important for the community manager to be aware of and aligned with an organisation's leaders and their objectives. Online community provides awareness into member sentiment and value. Consolidating vital insights in regular reporting to leadership stakeholders is strongly recommended, as is encouraging leaders to suggest areas where comment or polls can assist decision-making.

Like many digital investments, the organisation adopting online community will get from it what they continue to invest in it. This is true for the community management function but also applies to other internal staff teams. Marketing, learning, events, content development and other departments routinely coordinate with a community manager and use the community to achieve their goals.

The community management function can be outsourced, with some vendors offering this service directly.

Expense and Time

While community can be adopted for no cost (when self-hosting an open-source platform), the actual expense of standing up and running a robust online community platform in the membership sector largely trends with the size of the organisation. Cost drivers may include number of platforms to integrate, robustness of integrations desired, branding goals, cross-platform applications, and app needs among other requirements. Broadly, assume your online community budget will be between 5% and 20% of the previous website CAPEX budget with recurring expense of one-third that amount year over year.

Community implementation projects will typically run from one to six months depending on the complexity and staff time dedicated to the project. A staff-side implementation project manager would anticipate spending 10-20 hours per week during the project duration coordinating with the product vendor, consultants and stakeholders within the organisation. When working with a product or leading consultancy, the technical work by the staff team may be limited. Other internal staff teams for design and image creation may be utilised to varying degrees.

Following launch, the community manager would anticipate 5-10 hours of weekly time commitment at a minimum. The community investment will offer returns directly proportional to this investment.

Legal Compliance and Data

Community platforms should offer GDPR/GDPR-UK compliance features within an easy-to-use experience for users and admins. Use of the community contingent upon agreement to terms with those terms configured to a client's legal standards and needs is a best practice. A community vendor, through product features or manual actions, should be able to act upon user and client requests for data deletion and reporting and management. While data management provisions of GDPR apply, the community is not a marketing platform. Online community is a member benefit consistent with member services agreements members routinely sign when joining a membership body.

Online community instances commonly utilise the personally identifiable information (PII) of members. This is often within the context of user profiles and directory search features common to non-community websites in the membership sector. UK and EU-based organisations may have requirements that preclude some vendors who cannot facilitate localised hosting, self-hosting, or compliance with local standards and required data certifications.

Content Risk

Within the membership sector, community is most often delivered as a member benefit, with members posting under their own name often associated with their employer. As a result, the discourse in member communities is at a significantly higher professional standard than that seen in public social media environments. A best practice is setting these standards in the user agreement with manual confirmation assured before posting in the community can occur by any user.

A robust community platform will have tools – both programmatic and manual – to manage conversations and ensure the content shared is consistent with the professional standards of the organisation.

- **Moderation** – queue with multiple outcomes possible managed by designated admins/community managers
- **Content Flagging** – any user can flag a post with clarification as to their concern
- **Disallowed Terms** – “dirty words” filter allowing any terms to be excluded
- **Tiered Trust Levels** – different users able to post more sensitive content, such as videos and links, based on member type, time in platform, or other factors
- **Post Editing** – editing posts by designated admins/community managers

For communities serving the membership sector, perhaps the most common content requiring moderation is members “selling” or promoting services to other members.

Online Success Stories from the Membership Sector

MemberWise

Annual Turnover **< £1m**
Members **5,000 to 10,000 members**
Staff **<5 Staff**



MemberWise



MemberWise adopted online community in 2017 and has seen daily engagement and total membership climb steadily since – over 5,000 members participate. A desire for the community to be more accessible via mobile devices was met in 2019 through a dedicated network Mobile App inclusive of community functionality.

// What we have seen has been very much continued engagement with people. In the past it was up and down – seminar, newsletter, conference. But with online community, for us, it continues that engagement piece, //

Rich Gott, Founder and Chair,
MemberWise Network



Integrations

Online community can be a powerful stand-alone presence without integration, but most membership bodies look to ensure the community presence not be added as a unique “silo”. This is achieved through integrations anticipated by robust community platforms.

CRM & Authentication

CRM integrations often provide the user population to the online community platform and facilitate differentiated community experiences consistent with member type, interests, and other stored data. As membership-sector CRM solutions are routinely the host of single sign on (SSO) around the organisation's digital estate, you can expect a robust community platform to participate in CRM-facilitated authentication or authentication regime governing the primary website. Additional integrations are also desired to facilitate the CRM's capturing of member activity.

As CRM is commonly utilised as the “single point of truth” on member data, community integrations to record community activity in CRM can set the stage for the use of community data to inform other systems, such as website, marketing email engine, etc.

Website

Most robust online community platforms offer a website as a primary access point. There are many options for including this within the context existing primary and/or secondary websites. These begin by offering the community website via a sub-domain of the primary website. Content feeds embeds and comment embeds to the primary website are facilitated by many community platforms.

Mobile Apps

As social experiences are now “expected” to be offered in mobile apps, many community solutions offer a multi-tenant app (download the community product app then look up your community among the served clients list) within the baseline product set. Robust apps inclusive of online community functionality available under the organisation's brand in iOS and Android app stores are possible by leveraging the community product API. These are offered by vendors with approaches from configurable product to fully bespoke.

Marketing Automation

The most robust community product vendors will offer dedicated modules and integration options for blast email engines. With a very robust integration, these may utilise community data to personalise email messages based on interests declared or inferred from member community activity.

Other

Especially where a robust community platform offers a strong API or SDK, there may be no limit to the kinds of experiences an online community can facilitate or support. Zapier, WordPress, SharePoint and eCommerce platform integrations are common.

User Experience

Facebook, Twitter, Reddit, Instagram, etc. offer community experiences and are valued by much of the world's working-age population. The UX offered by an online community platform will be judged against those offered by multi-billion-pound companies.

Functional usability isn't the only UX factor for user adoption. As the online community is a virtual representation of the membership body, the user should recognise "their" organisation in the online community. First impressions are vital. The benefit of the platform and ideally the membership body must be in evidence at user initial interactions.

1) Value "This content helps me"

2) Interface: "I know how to use this"

3) Place "I know where I am"

4) People "I know who else is here with me"

5) Safety "I can express myself and build relationships here"

The goals of users are different from the goals of the organisation offering an online community. Usability of product features for thread management, moderation, subcommunities, tagging, etc. should be considered in the context of non-technical staff running the platform to meet goals on knowledge creation, engagement, and value.

Temperature Check & Next Steps

Membership bodies encountering a number of the following circumstances may want to review how online community could help:

- Members are asking for online engagement environments.
- Members are self-serving their needs to engage with other members in public social media outside our ability to manage.
- Committees and working groups are managing work in email without more robust tools or organisational visibility.
- Event value ends with the event; members lack access to online presentations and continued conversations
- Leadership needs a better "finger on the pulse" of member sentiment and modern challenges of the profession
- Members asking the same questions repeatedly
- Members who are geographically dispersed want to connect/network
- Due to external factors (e.g. COVID-19) traditional networking opportunities may not be possible
- A short term requirement to demonstrate immediate and tangible member value
- Compelling need to initiate a member benefits app with engagement features

If the business needs and feature sets described here sound compelling, review of platform options and conversations within an online community, like the MemberWise Network, may be a good next step.



Online Success Stories from the Membership Sector

Large Membership Body

Annual Turnover **£10M - £15M**
#Members **Approx. 200 Member Charities**
#Staff **20-50**



// I was confident the community project would be a success. While online communities can look engaging and appear to offer strong social/emotional components, the proof of the pudding is in the data. We had the right tools and strategies to focus on specific areas. **//**

Nancy Kinder, Member Community Manager



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Experience the MemberWise Network's Online Community, MemberWise Connect Today.

<https://connect.memberwise.org.uk>



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