

Connect: Launching your Group, Best Practices

This document contains some examples of how others have launched discussion groups.

The best way to get engagement from your membership is not by having your association staff lead the way, but fostering leadership within the membership itself.

Starting with Committees

Ask each committee to nominate one or two leaders who are responsible for ensuring their discussion group is getting used. Simple ways to accomplish this are posting committee resources such as meeting minutes, photos, videos, meeting links, etc. Posting summaries of the meetings by discussion allows others to provide feedback as well. For committees the community is a productivity tool. It's best to opt everyone in by default for immediate email notifications. (they are choosing to be on the committee afterall)

The community can also be used for committee events. We hope to roll out integration with many AMS for RSVP functionality and importing committee meetings and events. For some clients we have automation in these areas already, at no additional cost. Stay tuned or ask about timeline if you are interested. We always need early adopters or pilots for new features to ensure they are working correctly and doing what is required for your business rules.

Bring in Members with your Open Forum

An Open Forum is highly recommended, though it doesn't need to be called "Open Forum". You can call it whatever you like. If you don't have an Open Forum created yet, please contact support at help@sengii.com to request it. Remember to specify the name you'd like, and who should be placed into it - for example, only members in good standing, or only committee members. It is recommended you started with committee members.

Priming your Open Forum

The biggest hurdle with adoption of the community is not understanding the value or how to use it, or feeling insecure about asking certain questions. It helps members to understand the value by seeing examples of how it can be used. One way to do this for your general membership is to add committee members to your Open Forum so they may use it for a period of time (for example a month). Then when you're ready to bring in your general membership, they can see how it has been used previously.

One great use of the Open Forum is to ask if anyone wants to be in certain Committees the next term, or perhaps ask about criteria they would like added for education and product offerings. Remember that your community is designed to get feedback from your members! You can also push out changes in legislation or areas of confusion to see if anyone has authoritative resources to offer clarification.

You may also consider posting comics or jokes during tough times, and greetings during Holidays. **Remember to thank your members for their contributions and thank the association for providing the Online Community.** You may be amazed to find others chime into these threads with ample gratitude and perhaps talk about the value of membership and others supporting them in the community. This is especially common during Thanksgiving, Christmas, and New Years.

Launching your Open Forum

When you're ready to launch your Open Forum to members, let support staff know to update the procedures to automatically add members in good standing to that group by default at help@sengii.com. Once ready it is recommended that you update the group profile to not require Opt In, then use the Roster editor to opt in your members and set them to daily digest as the frequency. You can then post a welcome message, see the examples below.

Moderation and Bad Apples

It's not uncommon to turn on moderation per group as you launch them to ensure that there isn't an outcry from a few bad apples who may exacerbate problems. For example, if someone receives a welcome email and didn't want one, they may ask to be removed from the list by simply replying to the list! This makes things worse because then they will receive more unwanted email from the list. This may happen even though unsubscribe links may be obvious, so it's helpful for staff to moderate these types of posts to prevent them from being sent out.

You can turn on moderate per group using the Update Profile button from the Group Overview page. Remember to set a moderator and turn on administrative approval. The period of moderation can be fairly short, but you might consider 1 week to 1 month to ensure any bad apples are caught before they ruin the bunch.

If someone is particularly problematic or is breaking your policies, you can also set moderation per user.

Looking Foolish

In our experience members will defend other members when there are a few bad apples picking on someone for asking something that may be interpreted as foolish. If needed you can remind others of your policies against bad behavior, though often members will do this for you.

Strategies for Engagement

There are many ways to elicit engagement from your members. Some of these may be questionable depending on the formality and policies of your association. People respond to stories, emotions, and intuition. Your goal is to appeal to the largest number of people, which requires a range of communication tactics for different types of people (IQ, age, gender, ethnicity, geography, etc.).

- When talking about an offering such as an event, try telling a story about something that happened before, or perhaps how you managed to get a certain speaker, or the value of a certain topic based upon feedback from members.
- Use language that is common, straightforward, and easy to read. This does not mean avoiding technical terms in your field of expertise; but rather getting to the point directly in an easy to understand way.
- Remember that people skim on the internet - especially when using small screens. Think about communications as though an executive will read them. Number points that need responses. Bold things that are the most important if someone is simply skimming so they at least notice those areas.
- Fear of missing out, or FOMO, is a very common tactic for appealing to people. This is why many advertisements do not present a rationality towards a logical decision; but rather appeal to how you might feel in the situation you are trying to sell. For example, a new product will make you feel good, so there are people who appear to feel good presented. There are trends on Instagram and similar social networks of displaying people traveling - even to the point of not traveling at all, but photoshopping pictures to appear that way. Instagram has been found to cause the most unhappiness of all social networks because most everyone feels as though they are missing out due to the types of images posted there. Use FOMO thoughtfully when appealing to your members.
- Call to Action (CTA): What is the point of your post? What are you trying to accomplish? Who are you asking? When do you need an answer?
- Shooting in the dark: Why not ask your members why they might have gone to an event in the past, but did not register last year. You can ask them to respond with a private message if you're worried about a cascading effect. Ask them how something can be better. Ask them how they can deliver more value for their membership. Ask them about their professional concerns.
- Reward your members: Want your members to respond to a call to action? Why not offer a reward such as an iPod, tickets to a concert, a luxury set of wireless headphones, a product branded by the association, etc. How about running a report to find out who has contributed the most over the last year and giving them a free year of membership? How about finding the person who contributed the most each month and giving them something more minor, such as an Amazon or Starbucks gift card?

Novel Strategies

There are some segments that are consistently overlooked which a community is excellent for.

- Members close to retirement or retired: ask them if they are interested in being mentors to pass on knowledge and continue to participate with the Association in the interest of the profession.
- Non Members: shouldn't you be trying to convert this segment into members? Why not give them a taste of the community, such as 1 month of free access, or a more limited scope of access to see what is going on in the community which may be valuable; referral opportunities, knowledge and advice, professional tips, bleeding edge information about legislation, etc. (note: Sengii does not charge for non-member accounts, which is very unique among online community vendors)
- Students: these members or non-members can benefit from sharing resources, tips, talking about exam experiences, universities, curriculums, how to deal with pressures, etc.
- Mentorship: Mentor Match comes up often; however, we constantly get feedback from Associations that have run these programs about how much overhead they take and how little value they deliver. Our suggestion is to create a Mentorship group where mentors and mentees can come together and provide the wisdom of crowds. This requires little more than some etiquette reminders; compared to obligations on both ends, complicated matching, training about policies and etiquette (due to physical interactions), enforcement, policing, seasonality, expiration, fairness in distribution, gender and other preferences, etc.
- Contribution rewards: you might consider providing top contributors with some spotlight on partner pages and listings to provide real value to their business.
- Upselling and Marketing: perhaps a member clicked on an event but did not register - politely invite them to check out last years information on the community, or to ask questions about the event on the community for this year. Maybe charge more for community access (virtual access) to an event.

Monetization and Community ROI

An Online Community has one massive benefit that is often overlooked - monetization. It's difficult to fully quantify the value of the community, but you can side step that detail. Consider selling targeted advertisements in your community. It is recommended this be done at the bottom of emails, not the top. You know exactly what people are talking about and what interests them. This is an amazing opportunity for advertisers and allows you to easily quantify ROI.

When it comes to events, advertising to the community adds substantial value for sponsors. They don't simply get attention during an event, which is short lived; they can also show up during pre-event discussions, during, and afterwards for a period of time you can define (such as a year before the discussion group disabled discussions).

Features in the community such as Marketing Automation also allow you to apply a personal touch, or automatically market to specific segments of your membership. For example you can send your member a Happy Birthday reminder. Or if they haven't used the community in a while, ask them why they used to participate, but stopped recently. You might ask members who registered for an event the year before, why they haven't registered this year.

Overall the ROI on an online community is often simply the expectation that members want convenience, and it can help retain a portion of your membership.

Kick off Discussion Examples

Now that you're pumped up and ready to take action, check out the following examples that other customers have used in the past. Remember that any time you need assistance you can contact Sengii at help@sengii.com or schedule a training meeting at <https://sengii.com/meeting>

Welcome to GWSCPA Connect!

As a member of GWSCPA, you are receiving this message via our new online community. We hope you will use Connect to stay in touch with colleagues and peers.

For now, we will only be launching one group, the Open Forum, which includes all 3,500+ members. All members will be set to receive immediate emails when any new discussions/replies are posted.

You can post and comment on discussions either in the Connect platform or directly from these emails. To share resources and links, view news and update your profile you must login to Connect.

To login, you will use your www.gwscpa.org login and password. If you don't know yours, you can contact staff or you will be prompted to click to receive a verification code instead.

Once logged in, you can make updates to your profile and settings.

Please also view the Terms for site etiquette guidance. Be mindful that whatever you post will be seen by the entire membership. If you prefer to send messages to just one member, you may also do that via Connect.

If you wish to change your settings to receive a daily or weekly digest instead of immediate emails, there is a User Guide available on the landing page that can walk you through that, but staff will also be standing by to assist at 202-347-3050 or wmekonnen@gwscpa.org

If you know a fellow GWSCPA member who did not get this message, please tell them to whitelist emails from noreply@connect.gwscpa.org to fix that.

These are trying times, so we hope you will reach out to each other, as we are all in this together.

Welcome!

Welcome to DSCPA's online community! For many of you, this will be the first time you've interacted on a forum like this. It's easier than it looks! If you haven't yet had a chance, please review the email that we sent earlier today.

Have you had a chance to log in and update your profile? If not, just log in (using your DSCPA login credentials) and go to My Account.

You can find your Groups under My Group Pages. All posts will appear in the Open Forum.

To post a new discussion in the Open Forum, click Discussions in My Groups. All posts are sent via email to your inbox. From the email, you can post a new discussion or reply to a post. You can also reply to a post in Connect. You have the ability to adjust the frequency of emails to your preference.

So let's give it a try! We'll start with an easy question - what is your favorite color?

Welcome to LeadingAge CA Connect!

Good Afternoon LeadingAge California Members:

We are excited to announce that we have transitioned from Google Groups to a new platform called LeadingAge CA Connect. LAC Connect does everything the former Google Groups did plus much more. A brief brochure and User Guide are attached to this message for your reference to get you started. This exclusive online community designed especially for us. LeadingAge CA Connect provides an easy way to interact with other senior living and care professionals across the state, discuss issues and benefit from our extensive base of shared knowledge. You will also be able to access staff subject matter experts, who can respond to your questions and provide you with the latest policy changes and compliance resources.

Be sure to check out and join (if you have not already been automatically added) the Discussion Group that best matched your professional interests:

- Affordable Senior Housing Forum
- Assisted Living Forum
- Skilled Nursing Forum

NOTE: You may never need to interact with the platform online, but if you want to find past messages or attachments, or adjust your delivery settings, go to connect.leadingageca.org. You don't need a password to log in online. You just enter your email address and it will immediately send you a 4 digit code. Once your logged in on that computer, you should stay logged in until you log out.

You will continue to receive email notifications from Group Discussions like you did with the Google Groups. And just like the Groups, you can respond to a post by replying via email or via the online interface at <http://connect.leadingageca.org>.

Please feel free to contact us at info@leadingageca.org with any questions or concerns.

Welcome to FICPA Connect!

Good Afternoon Florida State Tax Section!

The FICPA is updating its Listserv software to a new platform called FICPA Connect. FICPA Connect does everything the Listserv did plus much more. Watch this short video, <http://www.ficpa.org/AboutConnect>, to see what FICPA Connect can do and feel free to play around with the new features.

You will continue to receive email notifications from Group Discussions like you did with the Listservs. And just like the Listservs, you can respond to a post by replying via email or via the online interface at <http://www.ficpa.org/connect>. Use your FICPA.org login to access FICPA Connect.

We will be introducing you to some of the new features of FICPA Connect over the next couple of weeks but for now, you can continue to use it just like you use the old Listservs. Please feel free to contact us at webmaster@ficpa.org with any questions or concerns.

Board of Directors Example: Welcome to Connect - Please respond prior to the Board meeting

We truly appreciate the commitment of time and talent made by our volunteers, and especially our board of directors. What motivated you to accept a position on the board? What value has your volunteer experience delivered to you personally or professionally?

[this elicited some very interesting responses we're not authorized to share; note that providing a call to action (CTA) is very effective for engagement - also setting a deadline]

Open Forum Welcome Example

As Chair of the MICPA, I am proud to introduce you to our exciting new social platform, **MICPA Connect**.

Please join me and other members in this exclusive online community designed especially for us. **MICPA Connect** provides an easy way to interact with other CPAs working in every aspect of business, discuss issues and benefit from our extensive base of shared knowledge.

This exclusive online community is designed especially for MICPA members. Click [here](#) now to join the discussion and get Connected!

Regards,

Robert M. Johnson, CPA, CGMA

2018-19 MICPA Board Chair

Open Forum Welcome Custom Invite Example (Code)

```
<!-- html -->
<div class="body" style="font-family: Arial, Helvetica, sans-serif;">

<p>Hi $@SESSION(FirstName)@$,</p>

<p>As Chair of the MICPA, I am proud to introduce you to our exciting new social platform,
<strong>MICPA Connect</strong>.</p>

<p>Please join me and other members in this exclusive online community designed especially
for us. <strong>MICPA Connect</strong> provides an easy way to interact with other CPAs
working in every aspect of business, discuss issues and benefit from our extensive base of
shared knowledge.</p>

<p>This exclusive online community is designed especially for MICPA members. <a
class="target"
href="$@REQUEST(RAWURL_WEBSITE)@$services/doauth.aspx?auth=$AuthToken$&authid
=$AuthID$&ReturnUrl=$@ENCODE(URL,$@CONCAT($@REQUEST(RAWURL_WEBSITE)@
$./data/listoverride.aspx?tdid=1&tlid=$, $ListItemID$, &gcode=EmailOptInOut&gid=1&ReturnUrl=
%2fgroups%2f,$ListItemID$, %3Femc%3DCongratulations%2C%20you%20have%20been%20s
igned%20up%20to%20receive%20emails%21%20%20Use%20the%20Discussions%20tab%20
to%20post%20a%20new%20discussion%20or%20reply%20to%20an%20existing%20one.)@$)
@$">Click here now to join the discussion and get Connected!</a></p>

<p>Regards,<br />
<strong>Robert M. Johnson, CPA, CGMA</strong><br />
2018-19 MICPA Board Chair</p>
</div>
```

CTCPA Coronavirus Conversations Opt In Invitation (code)

<!--html-->

<p>Hello \$@SESSION(FirstName)@\$,</p>

<p>Many of you are probably curious about what your peers are doing and how you can better help your clients. To give you a safe space to share your concerns, questions, and recommendations, we've established a "Coronavirus Conversations" group in CTCPA Connect.</p>

<p>You are invited to be a member of the \$@SESSION(HOSTSERVER.shortname)@\$\$ListItemName\$ group. Do you want to receive emails from the group?</p>

<p>Yes ! I'm interested in this group.</p>

<p>Click here to manage all of your notification settings.</p>

<p>If you do not want to participate in this group, no further action is required.</p>

Welcome to the State Tax Committee's Online Forum!

Good afternoon!

We are completing the final steps to implement a private online community exclusively for members, allowing you to ask questions, share resources, and stay connected with your fellow members from wherever you are. The community will allow for participation via our website as well as directly through email posts and replies.

We are launching the community with several pilot groups who will test the system, give us their feedback, and serve as champions when we open participation to the full membership. And you as the State Tax Committee are one of those pilot groups! In exchange for your feedback and testing, you get to experience the online forum a full month before the CTCPA membership.

I've attached a quick start guide to get you going. Please follow the steps on that guide and start posting! We're excited to hear any and all feedback you have and hope it's a great resource for you.

Any questions, feel free to contact me at 860-258-0229 or melissat@ctcpas.org; I'll be checking in with you every couple weeks as well.

-Melissa Thompson, Community Manager

NAA Connect!

Good Morning from Minneapolis, Association Executives:

I am happy to be sending you this message through the new communications platform that will allow all of the association executives in the federation to connect with each other. Simply by sending an email to AEs@connect.naahq.org you can ask your question or share your great resource with all of your colleagues.

So I know what you're thinking—"No more email!" But I also know that not one of you would turn away from a request of a colleague if they needed help and you knew you could assist. So this is an experiment, and we will see how it works. Here are a couple of things I am hoping you will do for me as we launch this:

You are currently signed up to receive emails in real time, but if this platform starts getting used often and it becomes too much, you can change that to a daily or even weekly digest of emails (although weekly won't let you provide a very timely response to your colleagues, it is better than unsubscribing).

You may never need to interact with the platform online, but if you want to find past messages or attachments, or adjust your delivery settings, go to www.connect.naahq.org.

There is no password to log in online. You just enter your email address and it will immediately send you a 4 digit code. Once your logged in on that computer, you should stay logged in until you log out.

Please use this platform mainly for asking questions of your colleagues and sharing resources. NAA will not be using this as a marketing channel or to send out reminders, etc. (we can find you other places) and the only people in this group are the AEs and the Association Resources team (including Kevin Watkins).

Depending on how this goes, we may create groups based on size (by resource director) for more targeted questions, but we don't want to start by over-segmenting.

I've attached a v-card that you can download so that this address is in your address book.

If this works, we can create separate groups for others on your team like the education folks, your GADs, etc. (and you can be in those groups or not at your choosing).

Let's see what happens next! And thank you for allowing us to experiment on you!

Thank you,

Ron

