



Building a Successful Online Community with Jive Forums

You've purchased your Jive Forums application or hosted service. How can you get the most from it? In this best practices paper, Jive Software provides guidelines for building a successful online community and specific recommendations for building an online community with Jive Forums.

This document is organized as follows:

- Overview of online communities
- Steps for planning your online community
- Maintaining your online community



Online Community Overview

Three words sum up an online community: people, collaboration, and content. An online community is a web-based, virtual community formed of people who come to it for a specific purpose—usually to answer questions, get advice, receive support, get recognition or status, or collaborate on projects or games. Although they may have different labels depending on who you talk to, communities are comprised of several types of people, including observers, supporters, thought leaders, and moderators. Finally, online communities are developed around a central theme or purpose. People collaborate around that purpose and generate output, or content, which arguably may be the most important piece in an online community's success.

Types of Online Communities and Their Benefits

Six main types of online communities exist—some with overlapping characteristics. Each offers specific benefits to its members and the individuals or organizations that launch and manage them.

Support Communities are designed to provide technical support to customers and users of a company's products or services. A major driver for these communities is to reduce call volume and increase service resolution by tapping into the collective knowledge of the user base and having customers answer other customers' questions. Technical support agents from the company participate in the community to keep discussions productive and to address questions unanswered by the customer or user base.

Internal Communities are designed for employees or members of an organization, and are used to increase productivity by reducing duplicative effort and facilitating information sharing. People visit specific forums to locate information and connect directly with people who can help them on work-related issues. Because people are in the same organization, establishing trust and reputations is not an important element of these communities. Internal communities use collaborative features such as chat rooms, blogs, online collaboration, file storage, and integration with existing business systems.

Media Communities are developed around news, sports, or other entertainment-related content, and usually allow participants to comment and share opinions on current events. Many media organizations use these discussion threads as a source for eye-witness accounts of news events and news leads.

Topical Communities address specific subjects or related topics; for example, an online community for new parents or pet owners. These communities typically use a question and answer format, and allow members to voice their opinions on topic areas. Many of these communities have "resident experts" who write editorials or insert expert advice to spawn conversation. Topical communities tend to have a very social and informal tone.

Developer Communities address very specific, targeted topics associated with technology development—for example, a group of software developers optimizing their applications for a new processor. Community members want to find the quickest path to a solution for a technical issue, though some members may be bolstering their professional reputation by being the recognized expert in a given technical area. These communities have deeper, more technical conversations than topical communities, and the tone is direct and succinct.

Gaming Communities are a hybrid of the topical and developer communities, having a large social aspect, but also generating highly technical discussions and content. People go to the community to share gaming experiences, plan games, and form teams. These communities can be very helpful and inclusive toward new members, but others may be clique-like and unwelcoming. Companies create these communities to provide customers with a benefit that has an intentional side-effect of building and extending brand loyalty.

Educational Communities use online communities to facilitate online classroom environments. Instructors can continue classroom dialog and provide support online. Students can also use the community to collaborate on team-based projects, homework, and other tasks.

Motivations for Joining or Visiting a Community

People visit online communities for a variety of reasons. Some of the most common ones are to:

Receive Support

Devotees of products or topics often go to online forums to offer and receive support. The community also creates a sense of camaraderie, so members who get their questions answered successfully often feel a sense of gratitude, prompting them to help other community members.



Build a Professional Reputation

Consultants, trainers, job-seekers, authors, and others building their professional reputations contribute content to online communities to gain professional recognition of, and respect for, their expertise.

Enhance Professional Skills and Abilities

Online community members often follow a discussion thread to learn about specific topics and issues. In addition, members strengthen diagnostic and communication skills by offering advice to others and learning what works as they follow issues to their conclusion.

Build Confidence, Bolster Ego, and Simply Feel Good

Many people enjoy the knowledge that their thoughts and insights have the potential to instantaneously reach a worldwide audience. People also feel good when they see others succeed with their advice and receive praises for that input.

A successful online community attracts and retains the right people; those right people collaborate regularly and productively to produce rich, highly relevant content; and that relevant content perpetuates the community by attracting more of the right people because of their need for, or interest in, the content. Good upfront planning will help ensure success with your online community.

At Jive Software, we recommend addressing these important issues before you launch or re-launch your community. Depending on the scope of your community, the planning process should take two to six weeks.



Planning for an Online Community

Verbalize Your Online Community Purpose and Goals

What do you hope to achieve with your online community—customer self-service, call deflection, brand loyalty, customer research, “buzz” metrics, identification of prospective clients? Develop a clear purpose statement, and include benchmarks and measurable goals to determine if your community does what you want it to do once it is up and running.

Define Your Users and Determine Their Expectations

You have to know who you are trying to serve with your online community to design it in a way that will meet their expectations. To target who your users are and what they want:

- Take a look at your existing customer base or a segment of that customer base—especially if you sell products or services. Understand how much they want to interact with your company. Use a survey, call, or email to find out what they want to get from the community.
- Examine the competition. What types of people participate in your competitors’ online communities, what content is popular, and how deep do discussions go?
- Identify other mediums for determining your user base. Conduct surveys of people you think are likely community participants or obtain mailing lists based on the demographic you want to target.
- Include a feedback forum in your community design. Build it in from the start so that users can tell you exactly what they want.

Critique the Competition and Online Communities You Admire

Make a note of the aspects of those online communities that seem to work and those that do not. Adopt those that work if appropriate for your community.

Choose the Jive Forums Features You Want to Implement

Once you’ve determined what your users want from your online community, select the specific Jive Forums features that best meet those needs. For example:

- **Reward Points and Question & Answer Workflow.** Perhaps the most important feature you introduce to a community, a reward point system helps ensure that constructive participation is recognized. Studies show that forums that have a reward system are 70% more likely to be successful. Jive’s reward point system is driven by a Q&A workflow that

tracks the status of questions and escalates unanswered questions to experts. Customer support, developer, and internal communities often benefit from these features.

- **Themes.** Themes allow you to create different brands around your communities by customizing the background color, logos, and fonts of your online community user interface. Primarily customer support and gaming communities use this feature, although topical communities occasionally use this feature, too.
- **Integrated Instant Messaging (IM) presence.** You can enable members to associate IM handles with their member profiles, allowing them to show when they are online, so that other members may engage them in a live threaded discussion. Internal and developer communities most commonly implement this feature.
- **Group Chat.** This feature allows you to associate a group chat room with a particular forum or category. Most types of communities can benefit from this feature.
- **Additional Features.** Our Jive Forums Administrator Guide provides additional core features. Review the Guide to see which features best support your community goals and users.

Organize Your Content

Well-organized content gets accessed, but to organize your content for Jive Forums, you need to understand the content hierarchy: Community → Category → Forum → Thread → Message. Review the example of the online kayaking community on the next page (Figure 1) to understand this hierarchy.

When planning your forums, think about the reasons users will come to your site. What are some of the things they would be interested in? For example, if you design your online community for runners, consider the topics most likely to interest visitors—shoes, nutrition, and training techniques. Devote a forum to each of these topics.

Recognize when you need to create a category as opposed to a forum. If you find yourself creating different forums for the same product, such as “Product XYZ Support,” “Product XYZ Info,” and “Product XYZ News,” consider making a Product XYZ category.

Create more general topic definitions because once your online community launches, your users will show you what they want and need. More general topics make it easier to manage your content as your categories and forums expand and divide over time.



Choose a Thread Structure

Jive Forums offers two options for discussion thread structure: People can respond only to the original question, or people can respond to the original question and other responses.

The first approach, which is seen in Figure 1, is a flat structure. The second approach is a threaded structure. Figure 2 shows

the same online kayaking community example using a threaded structure.

We recommend using a flat structure because threaded discussions can become too fragmented and difficult to follow; especially in larger, more active communities.

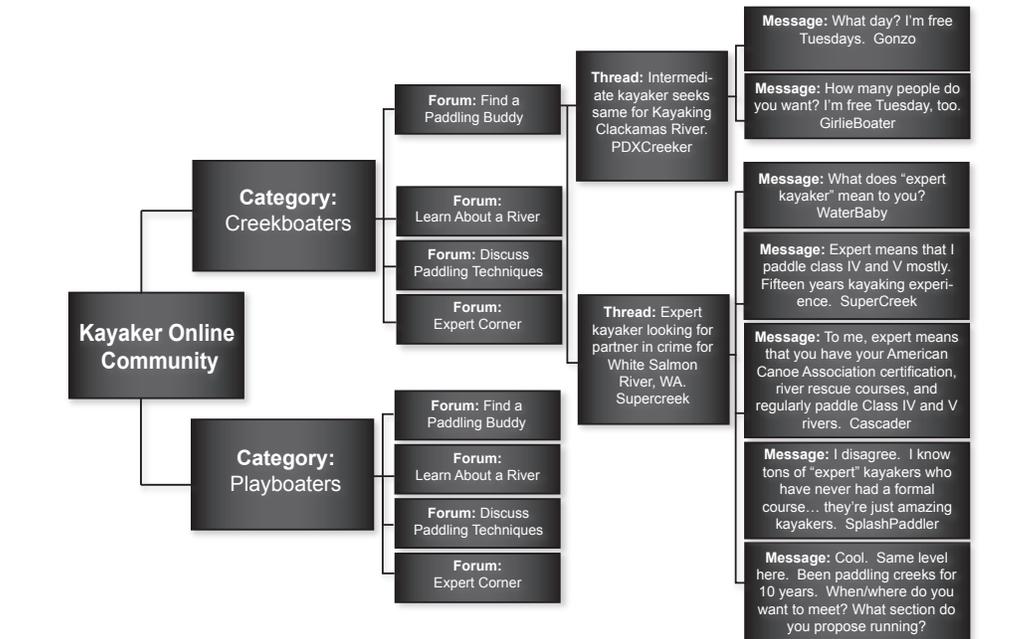


Figure 1. Online Kayaking Community Hierarchy (Flat Structure)

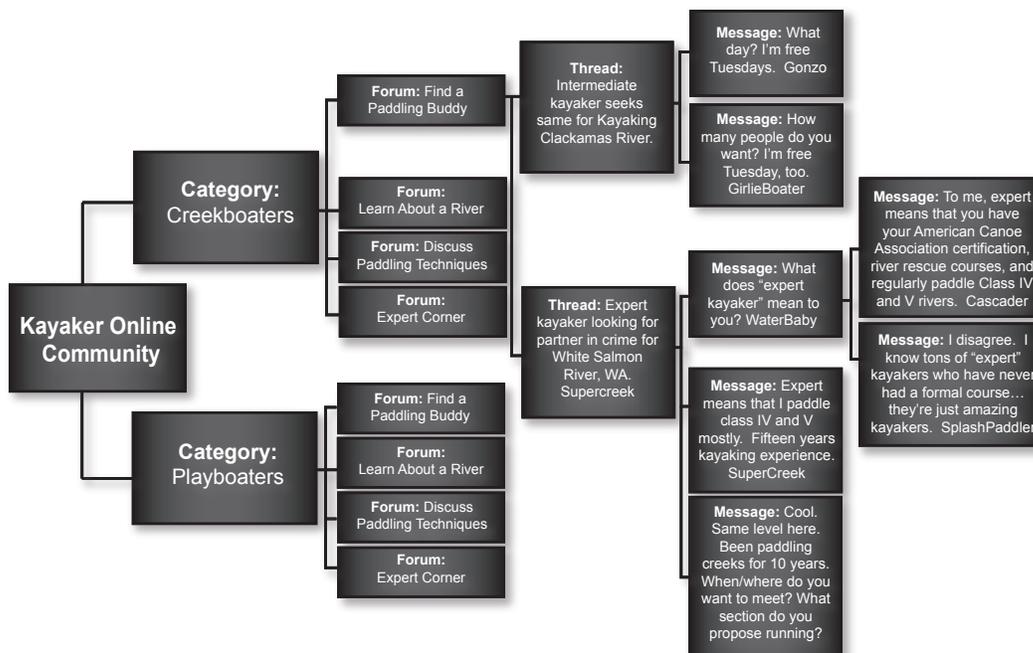


Figure 2. Online Kayaking Community (Threaded Structure)



“Prime the Pump” with High-quality Content

Plan initial content that will, as Derek Powazek, author of Design for Community puts it, “prime the pump” for future high-quality communication and interaction. Content can include articles, links to other articles, editorials, features, reviews, documentation, FAQs—all depending on the type of online community you develop and the types of material you already have on hand. Be aware that the content you provide on the site, including the tone, whether tongue-in-cheek or all-business, sets the tone for the responses. If you need to reflect your company image in the community, select content that supports that goal. Remember that content is the most valuable thing you can provide your community; without it, discussions have no starting point. Identify people who can provide good content: employees with expert knowledge, support personnel, or even experts outside of your organization.

Describe How You Will Attract and Retain Members

Drive Visitors to Your Site

You need a sound plan for driving the right people to your community turning those first-time visitors into contributing members. We have included these features to help publicize and drive traffic to your community:

- Community Everywhere. Allows you to insert a “Discuss This” icon next to web content so that content viewers can launch into a new or existing threaded discussion about the content. You can also use this to display existing comments on a web page that users can respond to within the web page.
- RSS Feeds. Automatically populates your home or product pages with links to the most popular and latest threads.

Plan additional activities such as sending an email targeted to people you want to join with a link to a discussion that might interest them, a scheduled online chat, or a training session about how to use the community. Link to the community from your e-newsletters, make it a part of your customer service/support portal and workflow, and include forum threads in general content search. Get creative here—look for ways to let the right people know about your community. And from a purely functional standpoint, make the link to your online community from your web site stand out.

Convert Visitors into Active Participants—Reward Them

Once you’ve attracted visitors to your community, you need to identify those members who contribute high-quality content and persuade them to contribute regularly. Active community members care deeply about their status within the community—a fact that most companies greatly underestimate.

Our status and reward system is driven by a sophisticated Q&A Workflow feature which rewards contributors who successfully address other participant’s questions.

Status levels give members prominence in the community and help members discern which posts are likely to be more useful than others. We recommend structuring your status levels so that you can easily add new levels as members accumulate more and more points.

Our Q&A Workflow feature allows members to mark answers Helpful or Correct. Members are far more likely to contribute again when they get feedback that their insights or suggestions were appreciated.

Organizations that have successfully implemented the reward and status features recommend implementing additional perks for star contributors. Some ideas below:

- Spotlight them or their content on the community main page
- Highlight their contributions in a newsletter
- Reward them on a monthly or quarterly basis with t-shirts or an iPod
- Send your top contributors to your annual user’s conference

Determine Who Will Manage the Community and Assign Permissions

The number of people you will need to manage the system, content, and users associated with your online community depends on the level of activity you anticipate, the number of categories and forums you have, the effectiveness of the auto-moderation features in your community, and the level of interaction you want with your community. Review the following table for a rough estimate of the number of hours you would need to devote to your online community based on page views and posts.

Maximum Page Views Per Month	Maximum Posts Per Month	Estimated Administrator Hours Per Week	Estimated Moderator Hours Per Week
100,000	2,500	3	5
250,000	5,000	4	10
500,000	10,000	5	20
1,000,000	25,000	5	30
2,000,000	50,000	8	40
5,000,000	75,000	10	50
10,000,000	10,0000	12	60



We have identified the following administrative areas, roles, and responsibilities that you may need for your Jive Forums online community. At a minimum, you will need a system administrator. Review the list and identify people within your organization well-suited for the various roles, but realize that as your community grows, you can always add more people to administer the community.

Be aware, that although there are several different types of roles below, you don't need to have separate individuals responsible for each role! Most communities, even large ones, have only 2 or 3 people assigned with administrative privileges.

System Administration

- **System Administrator.** Administers the entire instance, or community, of Jive Forums. Your system administrator tunes the system and specifies global attributes such as permissions, user administration, feature and user interface settings, automated moderation settings, and virus scanning and attachment settings.

Content Administration

- **Category Administrator.** Administers the content of one or more categories, modifying the global settings specified by the system administrator and fine tuning for their specific category or categories. Within a category, you may also have a Forum Administrator. This individual administers one or more forums within a specific category.
- **Moderator.** Manages the content before and after posting in a moderated forum. This person also has additional non-administrative responsibilities that are described in the Community Management section.

User Administration

- **User Administrator.** Manages individual user accounts.
- **Group Administrator.** Manages groups of users. This person is almost always the same person acting as the User Administrator.

In addition, you will need individuals to manage the non-software aspects of the community.

Community Management

- **Community Manager.** Sets the direction of the community and organizes the content. Community managers decide when to split forums and categories, and determine the categories and forums that the community needs.
- **Moderator.** Manages and moderates individual forums, ensuring that discussions stay on topic, that people treat

each other respectfully, and determines what to do with inappropriate content and members.

- **Content Supplier.** Creates high-value content to seed the community. You may use your support personnel, product managers, or developers as content suppliers. Consider inviting high-quality contributors to supply content.

Determine Your User Groups and Assign Permissions

Jive Forums ships with two default user types that cannot be deleted: Anyone and Registered Users. An Anyone user is simply anyone who visits the community, and is designed to be associated with a guest or to allow anonymous access. A Registered User is someone who has entered your community's required registration information.

Forming Groups

Once an individual registers, you can add them to a user group. The benefit of forming user groups is that you can save time by adding and removing permissions to multiple users in a group simultaneously. Determine the user groups you'll need before launching the community. For example, if you have an internal community, group users according to employee job function or department. Alternatively, if you run an online support community, group users by your different support contract levels.

Selecting Permissions to Assign to Users and Groups

With Jive Forums, you have the option to provide your users and groups permission to:

- Read forum content.
- Rate a forum message.
- Create a new thread in a forum.
- Post reply messages in existing threads (but cannot create a new thread).
- Attach files to messages.
- Post private messages.
- Post attachments with private messages.
- Create a poll.
- Vote in existing polls (but not create them).

There are 3 main classifications of users in your forums:

- **Anyone:** The permissions you set for Anyone users are a blanket set of permissions for anyone who visits the site – registered or non-registered. Think hard about what you want people to be able to do anonymously, but weigh that against the need to engage visitors to convince them to participate.



- **Registered:** Registered Users permissions are globally assigned permissions you give to anyone who registers. Participants must be registered in order to participate in threaded discussions.
- **Groups & Individuals:** For registered participants you can assign individual permissions, or permissions based on their Group. These permissions can also be assigned on a Category, Sub-Category, or Forum basis.

How Jive Forums Applies Permissions

Jive Forums permissions are actually applied when a user accesses forum content. First, the application examines the global user permissions, and then it applies any group permissions that the user belongs to. After applying those “user” permissions, you can apply “content” permissions at the following levels:

- **Community (Called Global in the Administrator Guide).** Specify the permissions you want all users to have when they log into your community and access forum content. These permissions can be added or removed to users or groups at the category and forum levels.
- **Category.** When the user accesses forum content, the system checks the user's Category permissions to see if they have been modified from the original Community level permissions. If so, when the user access forum content in that category or related subcategories, the Category permissions override the Community permissions.
- **Forum.** When the user accesses forum content, the system checks the user's Forum permissions to see if they have modified from the original Community settings or from the Category settings. If so, when the user is in that specific forum, the Forum permissions override the Community and Category settings.

For example, in an online support community, all users may have Community permissions that allow them to view and post content in the general community, but only those customers who paid for gold level support, and who are part of a “Gold Level” support group, can see and participate in a specific forum where they get more specialized attention. Other customers do not have permission to even see the forum.

Leverage Existing User Authentication Systems

If you have an existing user authentication system and/or an LDAP Directory, integrate these systems with your Jive Forums application to offer members log-in convenience and save you time managing user permissions.

Single Sign-on (SSO) Integration

Many web sites require visitors to authenticate themselves before they can access site content. By integrating with a Single Sign-on (SSO) system, users log in one time to authenticate and access web site content and the online community. We make the integration process simple, using the Auth Token and Auth Factory libraries. If you lack in-house expertise to do this integration, our experienced Professional Services staff can help.

LDAP Directory Integration

Avoid manual entry of user and permissions data by integrating your existing LDAP user database with your online community membership database. Refer to our Administrator's Guide for more information.

Develop Your Usage Policy

Design a usage policy to ward off abuse or inadvertent posts that are not appropriate for the community. Individuals out to make trouble will eventually show up in your community if it's a public one. Early warning can make a big difference, and can prevent your members from having a negative experience. Make the consequences for unacceptable behavior clear.

Derek Powazek, author of Design for Community recommends that you include a statement to the effect of: “We retain the right to remove content or deny individuals access anytime we feel it is necessary.” Some ideas for possible policy statements to include are:

1. No profanity.
2. Treat others with respect.
3. Stay on topic.

To help design your usage policy, review usage policies of sites you feel have the tone you want to have in your community.

Auto-moderation Features

We include several comprehensive auto-moderation features in Jive Forums to help you manage abuse or improper posts when they it inevitably occur in your community.



Filters and Interceptors

A filter dynamically formats message content before it posts to the community, while an interceptor, based on specific criteria, accepts, modifies, or rejects an entire incoming message before it enters the community. Filters and interceptors can be applied to message subject lines, body text, and properties. When you don't want any part of a message with an offending word to enter the forum before an action is taken, use an interceptor instead of a filter. Examples of available filters are:

- **Profanity Filter.** Automatically detects words in the profanity list and replaces them with ***. Use our list of common profanity terms from our Knowledge Base as a starting point, and then conduct a team-building exercise at the local watering hole to augment this list. This is the most commonly used filter, and you'll definitely want to use it.
- **HTML Filter.** Automatically detects and removes HTML tags. We recommend enabling this filter at all times to reduce security risks from Cross-Site Scripting attack (CSS) by preventing any HTML code to be rendered or executed.
- **Email Filter.** Detects text in an email address format and converts it into an email link.
- **Emoticon Filters.** Detects text that looks like an emoticon and turns it into an actual image.

The list of installed filters or interceptors shows you which filters are currently enabled and their order of execution. The order of filters or interceptors is important because the flow of control passes through them from the top down.

Report Abuse Feature

This feature gives your users the ability to help police the community by allowing them to report an offensive post to the moderator. A reported post can automatically be taken out of the thread when the number of users that report the post exceeds an administrator-specified number. The post is put into a moderation queue, and must receive moderator approval before it can be placed back into the thread.

Design the Layout of Your Online Community

Include brand owners and marketing staff in the design process to make sure the look and feel of the community serves as an extension of your corporate brand. Use our Themes feature to customize Jive Forums with your company logo, colors, font, navigation, and layout. Design it. Your community members will pay back any investment you put into the design tenfold. Refer to the Administrator's Guide for more information on customizing your community's appearance.

Above all, people should easily be able to find the content, respond to it, connect with other community members, and perform any activities in your community without a struggle. If you make it too hard, they'll give up. Make it easy.

Congratulations, you've finished planning your online community, and you're ready to launch it. The next section describes some things you should do once it's up and running.



Managing Your Community Once You've Launched

By good upfront planning for your community, you've eliminated most of the difficulties associated with managing it. From a maintenance and management standpoint, you'll need to:

- Check to see how you are doing against your measurable goals.
- Ensure that community content aligns with your original purpose statement.
- Manage content growth by splitting forums and categories as needed and retiring content when it becomes stale.
- Manage user accounts and user issues.
- Develop and seed the community with high-quality, stimulating content until community members begin providing the majority of that content for you.
- Review the community to identify what is working and what isn't.
- Continue marketing your community to attract visitors
- Make sure that your reward system is indeed helping you build an active community membership with high-quality contributors.

Demonstrate Your Community's Return on Investment

In addition to the above list, we recommend the following steps to proactively demonstrate to your organization's executives the strong Return on Investment (ROI) from your online community implementation.

Effectively Reuse Content Developed in Your Community

Highly relevant and timely information generated by the discussions amongst community members and between community members and your employees is captured and available in an easily searchable format for reference and re-use by your support, research and design, and marketing organizations. For example, customer support organizations, developer communities, and internal communities can edit thread contents, verify their accuracy, format them and add them to your knowledge base workflow or publish them as a knowledge base article.

Although the value of using knowledge bases to retain content and drive support clients to that content is not readily evident, populating knowledge bases with timely and valuable content on a regular basis is a major initiative of most organizations. Include this activity as a regular part of your community management plan to increase management's perception that your online community is generating a significant ROI.

Use Reports to Show Success through Activity Levels

We provide 24 pre-configured reports with Jive that can be run for the entire community or for individual forums for specified date ranges. We recommend using the following reports to demonstrate increased traffic levels and participation, and successful self-service resolution of issues:

- Page views
- User creation
- Resolved questions
- Average time to successful resolution

Track Participation in Your Customer Relationship Management (CRM) Application

Research suggests that online communities boost brand awareness and increase customer loyalty. For example, sites with communities are nine times more likely to be revisited by users, and community participants purchase five times as much and twice as often as non-participants. Use your Customer Relationship Management (CRM) application to compare relevant activities, such as sales for customers who are community participants versus those who are not, and report on those differences.