Qualtrics
XM institute™

INSIGHT REPORT

Capturing Insights from Online Customer Communities

BEST PRACTICES FOR BRINGING COMMUNITY INSIGHTS INTO YOUR VOICE OF THE CUSTOMER PROGRAM

By **Jen Rodstrom**, CCXP
XM Catalyst

Bruce Temkin, CCXP
Head of the Qualtrics XM Institute

December 2016

EXECUTIVE SUMMARY

Companies across a range of industries use online customer communities to augment their customer support, marketing, and product innovation efforts. However, when used thoughtfully, these online communities can provide value far beyond their original purpose. Because these communities signify an ongoing relationship between the company and participating customers, customer insights teams will find that these forums contain a treasure trove of insights. As a result of these deeper relationships, online communities offer unique advantages to voice of the customer (VoC) programs, including *Always-on Feedback, Broad and Diverse Insights, Continuous Dialogue, Peer-to-Peer Dynamics,* and *Employee-to-Community Interactivity.* These unique advantages can help companies adapt to the five Customer Insight Trends that are changing the face of VoC programs: 1) Deep empathy, not stacks of metrics, 2) Continuous insights, not periodic studies, 3) Customer journeys, not isolated interactions, 4) Useful prescriptions, not past descriptions, and 5) Enterprise intelligence, not customer feedback. To help organizations get the most value from their communities, Temkin Group has highlighted best practices for capturing and using insights from customer communities across these five trends. Companies also must plan for the entire community lifecycle to be successful; this includes *Determine Strategy*, *Structure Community*, *Recruit Members*, *Grow and Maintain*, and *Close Down*.

ONLINE CUSTOMER COMMUNITIES: AN UNDERUTILIZED INSIGHTS TOOL

Companies often build and manage online customer communities as a way for them to engage with, support, and learn from customers. While surveys, focus groups, and other more traditional research techniques have long been the backbone of voice of the customer (VoC) programs, online communities offer a different dynamic for understanding and developing closer relationships with customers (see Figure 1).

Temkin Group believes that online communities should play a more prominent role in VoC programs as they provide a distinct set of advantages, including (See Figure 2):

- **Always-on feedback.** Most mechanisms for soliciting customer feedback – such as surveys – often require significant lead-time for set up, recruiting, and data collection. However, once an online community is up and running, companies can immediately capture insights by posing questions to members and through discussions, observation, and other interactive activities. Community members have "opted-in" to participate and are available to provide feedback at a moment's notice – which can be extremely valuable when companies need customer input for critical, time-sensitive issues.

- **Broad and diverse insights.** Companies can collect insights across a range of topics and interactions because community members maintain an ongoing relationship with

the company. While a survey needs to be short and focused, companies can reach out to their customer communities over time for their input on matters ranging from product features to marketing materials to redesigned billing statements (see Figure 3). Moreover, business-to-business companies can hear from different customer types within the same company, such as a CIO, an end user, and an administrator. This allows the business to understand the unique needs of these different customer segments.

- **Continuous dialogue.** Online communities inherently support ongoing customer engagement. Consequently, they enable companies to develop deeper relationships with their customers because conversations can continue over the long term, allowing the company to learn more about customer needs both on the individual level and in the aggregate. By connecting the dots over time, the insights team can develop a more complete understanding of what motivates customers and how those motivations impact their journeys. Having a more complete picture of the customer helps companies grasp how their products and services fit into the broader context of the customer's goals.

- **Peer-to-peer dynamics.** Community interactions are not just between the customer and the company – members also develop relationships with each other as they communicate amongst themselves, discuss challenges, and solve problems together. Companies should recognize that members want to hear from and engage with other customers, rather than only getting the "company line," and should therefore encourage and reward top influencers in their communities. Companies can also observe these peer-to-peer interactions to learn how customers use their products and services and how they can better address customer needs.

- **Employee-to-community interactivity.** In addition to learning how community members interact with other members, companies should also understand how employees interact with members. Traditionally, access to customers and their feedback was limited solely to a customer insights team. Now, however, customer communities have opened up opportunities for employees across the organization to engage with customers in a myriad of ways, such as product-specific forums, question and answer sessions, and one-on-one conversations. This direct interaction leads to increased customer empathy and understanding across the entire organization.

ONLINE COMMUNITIES PLAY A ROLE IN NEXT-GENERATION INSIGHTS

The unique attributes of online communities can add value across every aspect of a VoC program (see Figures 4 and 5). But these benefits extend beyond current customer insights efforts; communities can help companies prepare for the future as well. In fact, online communities should play a vital role in helping companies prepare for the five Customer

Insight Trends previously identified by Temkin Group.[1] Our research has uncovered a number of ways that communities can impact each of the following trends (see Figure 6):[2]

1. **Deep empathy, not stacks of metrics.** Companies need to tap into more qualitative methods to uncover richer insights.

2. **Continuous insights, not periodic studies.** Insights teams need to take responsibility for continuously educating the company about problems and opportunities.

3. **Customer journeys, not isolated interactions.** Insights teams need to analyze and frame findings in the context of customer goals and their paths to achieving these goals.

4. **Useful prescriptions, not past descriptions.** Insights teams need to optimize how they help the company make decisions that will improve the business.

5. **Enterprise intelligence, not customer feedback.** Companies need to combine customer feedback with the multitude of insight sources across the company.

Deep Empathy, Not Stacks of Metrics

Community insights tend to be more qualitative than quantitative. Rather than focusing on metrics, these insights tell companies more about who the customers are, what they need, and how they feel – all of which are critical to increasing organizational empathy. Companies looking to take advantage of this rich source of insights should:

▪ **Identify latent pain-points.** Wheaton | Bekins, an interstate moving company, launched its customer communities as a way for customers to share their experiences before, during, and after their moves. From its communities, the company learned that customers often find the lag time between relocating to a new home and the moving truck arriving to be a particularly disorienting part of the experience. By observing peer-to-peer interactions in the community, Wheaton | Bekins discovered how customers manage that awkward period of time. Community members offered each other packing tips and suggestions, such as investing in an air mattress for sleeping, getting Internet installed immediately to learn about the new community, and bringing dishes and silverware to cut down on eating out. Observing these community discussions helped Wheaton to learn more about what causes customer stress during a move, even when it doesn't involve the company directly, and thus enabled it to tailor content and support to address these concerns more effectively.[3]

▪ **Use creative outputs.** Voice of the customer reports and presentations often focus on numeric metrics, charts, and graphs. The insights gleaned from customer communities, however, are more qualitative and descriptive in nature and companies need to think creatively about how they share these rich, detailed findings with the broader organization. While sharing verbatim postings from the community is a start,

---

[1] See the Temkin Group Report, "The Future of Customer Experience Insights" (December 2014).

[2] For this report, we interviewed a number of companies and vendors, including Acer, c_space, CA, Community Roundtable, Dub, Higher Logic, Horizon BCBSNJ, L'Oreal, Lithium, Oracle, Passenger, Salesforce, VMware, and Wheaton Bekins.

[3] See Temkin Group Insight Report, "Lessons in CX Excellence, 2016" (January 2016).

it is still insufficient for adequately conveying the customers' experiences and emotions they shared in the community. Instead, insights teams should use storytelling, images, and other visual outputs to convey community insights and to leave a more lasting impression on stakeholders. Examples include interactive microsites that allow employees to get closer to their customers' daily lives or a poster series that brings healthcare consumers thoughts and feelings to life (see Figure 7).

- **Employ in-depth activities.** While companies can capture plenty of insights from passively observing the community, they can enjoy even more significant benefits by conducting in-depth qualitative research with a subset of community members. When Horizon BCBSNJ wanted a more comprehensive understanding of customers' experiences with its website, it invited twenty community members to take part in one-on-one online sessions. During these sessions, participants completed common tasks, such as looking for specific health plan information, finding a healthcare professional, or searching for their Explanation of Benefits. The company recorded both video and audio of each session and used visual facial coding to identify the customers' emotional state and experience during each phase. Horizon now conducts this research earlier in the process, recruiting community participants to test wireframes during in-person focus groups.

- **Involve cross-functional stakeholders.** It is more powerful for internal leaders and stakeholders to interact with customers directly than to review a findings report. CA has teams from across the organization participate in the community by setting up community *Office Hours*. During a set time, a diverse team representing different areas of the company comes together on a conference call and answers chat questions that come in from the community. These questions can cover everything from documentation to product features, and the appropriate person either responds or researches the answer. In addition to hearing from and interacting directly with customers, the final transcript of the session is cleaned up and posted to the community.

Continuous Insights, Not Periodic Studies

To be truly customer-centric, companies need to apply insights to their decision-making process on an ongoing basis. Infrequent VoC reports scheduled months apart are insufficient to meet this continuous need. Because communities are always on, customer insights teams can tap into them to provide input to key business questions at a regular cadence. To support continuous insights, companies need to:

- **Provide feedback across silos.** Many companies only ask for feedback after a support interaction or with a periodic satisfaction survey. These mechanisms tend to have a narrow focus and typically do not provide actionable insights that drive customer experience change across an entire organization. National Car Rental launched its private *Emerald Exchange* community in order to better understand its customers' perspective of the entire rental car experience and to deepen its relationship with its loyalty club members. National's community has helped create EmeraldAlerts[SM] email communications; Drop & Go[SM] expedited rental services, the National mobile application, and its Premier Selection upgrade program. No individual survey could have provided such a breadth of insight that touched all areas of the company. The community members also acted as an on-the-ground extension to the

company by providing feedback about airport locations the insights team is unable to visit – through photos, videos, and first-hand accounts of their experiences. This always-on connection to its most loyal customers allows the company to continuously hear and act on insights that impact the entire organization.[4]

- **Encourage top contributors.** Before communities can provide truly rich customer feedback, they must first reach a tipping point where members create more content than the community moderators. Developing this level of engagement takes time, effort, and the right types of incentives. While extrinsic rewards, like cash incentives or merchandise, may spark initial interest, intrinsic rewards are more successful motivators over the long term. Effective rewards for top contributors include special access to senior leaders, VIP seating at events, and opportunities to publicly highlight their achievements. At Acer, super fans who are part of the *Acer Community Expert (ACE) Program* can test new products in their homes and submit a report to the company about their experiences. This program not only provides Acer with important feedback, it also makes the ACEs more prepared to interact and support other customers in the community when the product rolls out more broadly (see Figure 8).

- **Support real-time feedback.** Business decisions are made daily, but traditional market research only takes place sporadically. Rent-A-Center grew frustrated trying to answer both simple and more complex questions without readily available customer insight, so it developed the *RAC Inner Circle* as a cost-effective means to help it make strategic business decisions more rapidly. This customer community quickly delivers pertinent insights, enabling the company to make better decisions based on customer input rather than past performance or gut instinct. The *RAC Inner Circle* has weighed in on online payments, provided insights into pricing, and impacted which promotions and advertising Rent-A-Center brings to market. Thanks to its community, Rent-A-Center can even make tactical decisions more quickly, like changing in-store layouts to reflect community preferences.[5] The UPS Store faced a similar challenge with its small business owner customers, so it – together with its ad agency, Doner – launched the *Small Biz Buzz.* Thanks to this online community, The UPS Store can now launch 3-5 research activities in the time it previously took to complete one traditional study. Furthermore, the company can now mine the community for insights on an ongoing basis. Through the *Small Biz Buzz*, the company has also captured member success stories, which it then uses in its case studies and marketing materials.[6]

- **Manage issue escalation.** Companies can find it challenging to respond promptly when customers identify issues with a new product. When Acer launched its new Predator curved gaming monitor, community members immediately began uncovering issues. After peer-to-peer support and Acer's community technicians exhausted their attempts to fix it, the company escalated the problem to its engineering team in Taiwan. Acer kept the community up-to-date on its progress and continued to respond to additional questions in the community. Once the engineers

---

[4] See C␣space case study, "Innovating a Superior Car Rental Experience," and video, "How National is Co-creating an Award-Winning Car Rental Experience with Consumers," (May 2015).

[5] See Passenger Case Study and video, "Sparking a Customer Focused Revolution: How online communities enabled Rent-A-Center's CX evolution." (October 2016).

[6] See Passenger Case Study, "Small Biz Buzz for Big Results," (Sept. 2015).

found the fix, the Acer team shared the solution with the community – both with individual customers and in the broader topic thread. The community team also marked the discussion with a "Solution" button, which took community members straight to the fix so they didn't have to read the entire thread. The deep relationship and open communication between Acer and its community helped the company manage this challenging situation rapidly and effectively.

Customer Journeys, Not Isolated Interactions

Companies need a fundamental understanding of their customers' lives overall, not just those moments when their lives happen to intersect with the company. Communities help companies become familiar with customers' broader decision-making ecosystem. And by learning more about customers and their motivations over time, companies are able to meet their needs more effectively. To move towards a journey-centric focus, companies should:

- **Promote non-customer participation.** Some companies find it valuable to open their communities beyond customers or prospects and include non-customers in an effort to better understand their markets. For example, a technology company might build a public community where the majority of its members are not customers, but thought leaders in the technology space. These thought leaders could use this community to share best practices and help other members evaluate competing solutions from different vendors. Being privy to these discussions would help the company to more clearly understand the thought process and factors that influence technology decision-makers. Rather than solely focusing on its products, the company could use its community to glean insights into trends in the space, learn about innovative thinking from key technology opinion leaders, and increase its own awareness for its product line. Participants, meanwhile, could grow their personal brands and reputations while influencing better solutions in the technology space.

- **Understand the broader context.** Companies typically only focus on understanding how customers feel about their products and services and tend to overlook the broader trends or interactions that influence customers' decisions. When Santander – a Spanish bank – acquired Sovereign Bank in Boston, the bank wanted to understand how its "new" customers felt about a foreign bank entering the US market. Santander used the existing Sovereign Bank communities to build a deeper relationship with these customers. Through these communities, it learned that customers were not concerned about the nationality of the bank's ownership as long as they could trust the bank.[7] Similarly, L'Oreal uses its communities to learn, not just how customers feel about its products, but also how they manage their beauty routine in the context of their broader morning activities. These communities allowed L'Oreal to understand more clearly how its products fit into its customers' busy lives.

- **Offer proactive assistance.** Because communities facilitate an ongoing dialogue between an organization and community members, companies should use them to identify the areas where customers frequently struggle or need additional help. Once they recognize problem areas, companies can then provide proactive assistance geared towards those challenging aspects of the customer journey. Autodesk created *Autodesk Help Webinars* to address popular topics and questions that have surfaced

---

[7] See C_space Case Study, "Launching the Santander Brand in the US," (2015).

in its community, ranging from licensing and installation to advanced product features and functionality. The webinar program started as a pilot, but due to member response, the company now hosts webinars regularly, posting the recorded video content in the community afterwards. These webinars are often viewed by up to 200 live attendees, and the recorded video can get another 5,000 views after its been posted.[8]

▪ **Connect online and offline.** Customers journeys are rarely constrained to one channel; instead they typically involve a mix of online and offline interactions. Online communities can bridge these two worlds by providing a way for members to connect even when they physically cannot meet in person. The North American Association of Subway Franchisees (NAASF) did not have a good way for its franchisees to communicate with each other outside of its periodic town hall meetings. And unfortunately, these occasional in-person events did not allow enough time for franchisees to exchange information and ideas on how to best run their businesses. By launching an online community, the NAASF's members could come together to solve business challenges from the mundane (fixing a receipt printer) to the complex (legislative issues impacting franchisees) on a regular basis.[9] Similarly, the Microsoft Dynamics User Groups (CRMUG) are independent organizations that support both the individuals and the companies that use the Microsoft Dynamics CRM product. While the CRMUG members could interact through in-person regional chapter meetings and their annual conference, they needed a way to engage with each other between these events. So they created the private *CRMUG Collaborate* community as a means for members to troubleshoot and problem solve. This community also helped members plan their face-to-face meetings before, during, and after the actual events.[10]

▪ **Involve employees across the lifecycle.** While involving employees in online communities adds significant value, companies may find it difficult to engage employees in their communities. Salesforce identified places throughout the customer lifecycle where employees can engage with customers in the community. For example, account executives can create a private group in the community with a prospective client to engage them both pre-sale and post-sale. Product mangers can launch groups within the community to run small pilots and test new product ideas. And the Customer for Life organization has incorporated the community into its onboarding process for new customers. This team helps new customers navigate the community forums by highlighting the relevant ones, which makes the community feel more welcoming and less overwhelming.

Useful Prescriptions, Not Past Descriptions

Insights teams typically focus their energy on producing dashboards and reports that are lagging indicators of how customers felt about their experiences. However, to drive meaningful, proactive change, these teams need to interpret data and recommend necessary actions to internal decision-makers. Customer communities not only help companies

---

[8] See Lithium's View blog, "Groundswell: Autodesk Drives Customer Loyalty with Collaborative and Proactive Community," (August 2015).

[9] See Higher Logic case study, "NAASF Crowdsources Customer Support and Advocacy with Online Community," (2016).

[10] See Higher Logic case study, "Create a Secure Space for Knowledge Exchange," (2016).

understand issues, but they an also help companies identify and design the appropriate solutions. To harness the power of customer communities, organizations should:

- **Involve the community in redesigns.** Often a company will learn from its VoC that one of its interactions is not meeting customer expectations. While low scores or calls to the contact center can indicate a problem, they can't offer a solution. Communities can provide more detail on the problem as well as ideas on how to fix it. When Horizon BCBSNJ launched its first individual plan in the ACA marketplace, it found that some members had questions about their monthly invoices. The company shared invoice examples with community members and asked them for their insights into what was not clear and what could be modified or changed to help make the invoices easier for members to understand. Based on the feedback it received, Horizon refreshed its invoices, highlighting key points for members to note, including all the ways customers can pay their monthly bills. These modifications, along with a few others, helped improve customers' understanding of their monthly invoices and significantly reduced the number of invoice-related support calls.

- **Respond rapidly to customer questions.** Communities become extremely powerful when content creation shifts from being primarily company-initiated to primarily member-initiated, with customers responding to each other's posts and questions. CA wanted to establish a culture where employees responded quickly to community member questions, so it created internal goals for response time. Along with employees, community members answered peer questions in the community, and once members saw other members responding to questions, they were more likely to pitch in as well. Consequently, CA managed to raise the percentage of answered questions in its community to well beyond its initial goals. Oracle found that questions asked on the community over the weekend tended to be answered by a peer rather than by an Oracle employee, which minimized the customer's need to wait until business hours. Online customer communities not only provide rapid response times to customer questions, they also allow a company to glean insights from the back and forth problem solving that takes place between community members, which it can then bring into its own support processes.

- **Co-create new products.** Speed and differentiation are critical when bringing a new product to market. DeWALT, the power tools manufacturer, realized it could work with its customer community to improve both of these factors. The company uses its 10,000 community members to concept test brand new ideas and to collect feature-specific feedback on existing tools. It gathers new product ideas from the community, evaluates them, and then co-creates the ideas deemed most feasible with community members. Through its community, the company has received valuable insights that span from the earliest stages of development through to pricing and product packaging.[11] CA realized it could respond to customers' enhancement requests more effectively by bringing ideation into its public community. Although product managers initially feared sharing potentially proprietary information, they soon realized that transparency did not require revealing confidential information. Far from being problematic, this type of innovation actually allowed CA to keep up with its competitors and improve its product releases.

---

[11] See Direct Marketing News article, "Customer Insight is DeWALT's Power Tool," (November 2015).

- **Operationalize best practices.** Companies with independent agents and partners often find it hard to capture and share best practices. Wheaton | Bekins knew customers wanted to minimize moving expenses by packing themselves rather than paying the company for this service; however, despite decreasing costs, self-packing also means that customers have to assume all the risk of damaged boxes, which could ultimately be more expensive for the customer. Wheaton | Bekins saw some community members share their experiences with an agent who offered color-coded packing labels to indicate which items are fragile, which boxes should be loaded last, which should be opened first, and which boxes belonged in each room. The company realized that it could easily scale this practice across all 350 agents for the two brands and provide consistency by managing the printing and shipping for all agents. This practice became a differentiator that agents could share with potential customers before the sale was finalized.

Enterprise Intelligence, Not Customer Feedback

While the insights community members share are helpful, their input becomes even more valuable when it's combined with operational, transactional, and other internal customer data. By bringing this disparate data together, companies gain a more comprehensive view of what customers need, what they want, and what emotions they feel and how these factors impact their experience. To fully embrace this more expansive view, companies should:

- **Create an account-level view of community activity.** Companies can take individual community member's comments from its most important accounts and turn them into valuable, account-based insights. VoC teams can create dashboards that combine community comments and postings with account insights from other channels. Aggregating all this information gives account managers a more complete view of the account's enhancement requests, engagement level, and overall health, which allows them to meet their clients' needs more effectively. B2B companies can also use their online communities to uncover insights about the experiences of different roles in an organization. For example, communities can learn about the differing experiences of the decision-maker, the procurement department, and the end user.

- **Tie community insights to behaviors.** While community insights are valuable on their own, they become extremely powerful when combined with CRM and other data to show how customer attitudes impact behavior. When Salesforce analyzed the activity of its community members, it found that participating customers tended to have larger closed deals and more active pipeline. It also found that community members had higher product adoption and cross-sell/up-sell rates compared to those not in the community (see Figure 9). Similarly, Oracle ties its customers' community activity– such as status, satisfaction, and product interests – to its marketing database, which gives it a more complete picture of the individual customer. The company also includes its findings from focus groups and survey data so it can conduct linkage studies that measure the impact of user group participation.

- **Validate issues identified in other channels.** Customers have a multitude of ways they can let companies know they have an issue: phone, email, chat, and social media. Online communities can be valuable for determining how severe and widespread a problem is, and also for finding a potential avenue for fixing the issue. For example, if

a high tech company hears about a problem with a product release though Twitter, the insights team can look to the contact center for information on call volumes while simultaneously tuning in to the community to see if members have raised the same issue. The community moderators can then observe how community members are troubleshooting the problem and get them involved in identifying a solution. And once a solution is found, the company could share it within the community as well as across the other support channels.

MANAGING A SUCCESSFUL CUSTOMER COMMUNITY

While online customer communities can provide an ongoing, real-time source of feedback, launching a successful customer community requires a well-thought out strategy. The company needs to plan for the entire community lifecycle, from defining a strategy to get started to potentially closing it down. Each stage has its own considerations:

- **Determine strategy.** A company needs to clearly define why it's launching a community, how the community supports the organization's overarching business objectives, and who will be involved. The first step is identifying the primary purpose of the community. While this goal may change over time, the company needs to be clear on what it wants to accomplish when it creates a community. The organization also needs to determine who will be involved in the community on two levels: internally, meaning which stakeholders and internal teams it will include, and externally, meaning which customers, prospects, or industry-thought leaders it will invite to the community. Careful planning will guide how the community is set up, the type of activities and interactions that it will support, and how the company manages the community (see Figure 10).

- **Structure community.** Companies must determine the type of community they need, select a platform to support it, and then draft a research agenda to guide day-to-day activities. Identifying which audiences the company wants to participate will influence the community type – open, closed, or some combination of the two (see Figure 11). Most companies are unlikely to have internal software for building a community, so they will need to determine the features and functionality they desire and investigate the options available to them. Finally, the team responsible for the community should create research calendars extending three, six, or ideally up to twelve months out. This includes working with stakeholders to identify the key business questions the company wants answered as well as developing an outline of interactive exercises to engage members.

- **Recruit members.** Once the company has crafted its community strategy and identified the desired participants, the company needs to recruit community members. If customers are the primary audience, companies should tap into their customer databases and use emails to invite them. They also can reach out to Facebook and Twitter followers. For non-customers, including prospects and thought leaders, companies can scan LinkedIn groups, scour blogs, and use web intercepts to recruit potential members. Companies need to decide if incentives are appropriate or necessary for both their recruiting and overall community strategy. Recruiting, however, is not a one-time endeavor – although successful communities can grow organically over time. Instead, companies need to commit to ongoing efforts to bring

in new members. More mature communities often use search engine optimization (SEO) to ensure that community generated-content appears toward the top of Internet searches.

- **Grow and maintain.** The initial make-up of a community is unlikely to be the same as the make-up of the community a year or two later. There is a maturity curve for both the members themselves (e.g. newbies, lurkers, regulars, seniors, top contributors) and the community itself as it shifts from being primarily company-led to being user-driven (see Figure 12). Community success over the long term requires governance and long-term plans to promote ongoing engagement. This plan needs to include reporting back to the community on how its members have influenced and impacted company decisions, such as product features and other enhancements. The community team also needs to continuously educate the company about the community – its findings, opportunities for employees to participate, and its accomplishments – to ensure continued support and funding.

- **Close down.** While there are examples of communities that have been running for dozens of years, there also are situations when it is both appropriate and desirable to shutter a community. This can be due to it being part of a finite project, changing company priorities, budget constraints, or changing company demographics that are not favorable to a community environment. The transition away from the community needs to be handled tactfully and with clear notification of where customers can go in the future to find the content and guidance they previously enjoyed in the community.

Comparing Online Community Insights
To Other Feedback Sources

Feedback Source	Strengths	How communities are different
	Weaknesses	
Focus Groups *Bring a group of customers together for a moderated discussion in person or online*	▪ Hear detailed, qualitative feedback ▪ Answer "why" customers act or think a certain way ▪ Vocal participants can dominate discussion ▪ Risk "group think" ▪ Time consuming	▪ Learn from dialogue between members ▪ Continue discussions over a longer timeframe ▪ Invite employee participation and input in relevant forums
Surveys *Series of questions that capture numeric and open-end feedback*	▪ Large sample sizes ▪ Quantitative analysis ▪ Track longitudinal metrics ▪ Too focused on numeric responses ▪ Not easily actionable ▪ Snapshot in time	▪ Capture feedback continuously over time ▪ Uncover insights across a range of topics ▪ Probe for more detailed responses in real-time
In-depth Interviews *In-person or over the phone discussion with one or several respondents*	▪ Develop rapport with interviewee(s) ▪ Probe for detail in key areas ▪ Time-consuming to set up and recruit participants ▪ Requires trained facilitators	▪ Eliminates need for small sample sizes ▪ Can seed critical business questions as needed ▪ Removes requirement to focus on one main subject area
Contact Center *Speech analytics record and categorize contact center interactions*	▪ Can categorize topics and sentiment ▪ Gather insights from every call ▪ Requires software investment ▪ Only hear about negative experiences	▪ Hear from a range of customers, not just those needing support ▪ Encourages peer-to-peer assistance ▪ Support problem-solving for pain points

Qualtrics
XM institute™

Copyright © 2016, 2019 Qualtrics®

Figure 1

Attributes of Online Customer Communities

Attribute Description	Benefits
Always-on Feedback *Once a community is set up, it can be tapped into for insights in real-time*	▪ Generate a constant flow of insights to drive day-to-day decision-making ▪ Engage members to understand root cause of known issues ▪ Identify ongoing trends or new issues by observing community discussions
Broad and Diverse insights *Solicit and receive input into business challenges that span the organization*	▪ Probe into problems identified in other channels ▪ Engage customers in in-depth discussions across a range of relevant topics ▪ Hear from community members about issues that are most critical to them
Continuous Dialogue *Nurture deeper, ongoing relationships with community members*	▪ Build understanding of customers' long term goals, not just their individual interactions ▪ Include customers in continuous improvement efforts ▪ Develop better understanding of changing customer attitudes and behaviors over time
Peer-to-Peer Dynamics *Establish a supportive environment for community member interactions and relationship-building*	▪ Identify latent pain points from member discussions ▪ Compile best practices of member-driven problem solving ▪ Encourage top contributors to act on behalf of the company by responding to member questions
Employee-to-Community interactivity *Create opportunities for employees to engage with community members*	▪ Observe community activities to better understand customer needs ▪ Develop closer relationships with customers through ongoing engagement ▪ Build customer empathy by having employees interact with community members

Qualtrics
XM institute™

Figure 2

Types of Community Insights

Internal Department	Type of Insights
Marketing	▪ Identifying words customers use to describe their experiences ▪ Collecting responses to advertising, marketing, or website copy ▪ Learning how customers like to receive communications ▪ Understanding trade-off decisions
Product Development	▪ Learning how products and services are used ▪ Prioritizing or ranking of needs ▪ Ideating product enhancements ▪ Iterating design changes as needed ▪ Collecting immediate reactions to product/service changes (e.g. product releases and upgrades) ▪ Testing prototypes ▪ Co-creating new products and services
Strategy	▪ Performing gap analysis of unmet needs ▪ Capturing feedback on competitive products and services ▪ Identifying paint-points in the customer journey ▪ Staying apprised of customer reactions to larger market and industry trends
Support	▪ Finding early issues ▪ Learning how customers troubleshoot challenges ▪ Observing peer-to-peer problem solving

Qualtrics
XM institute™

Figure 3

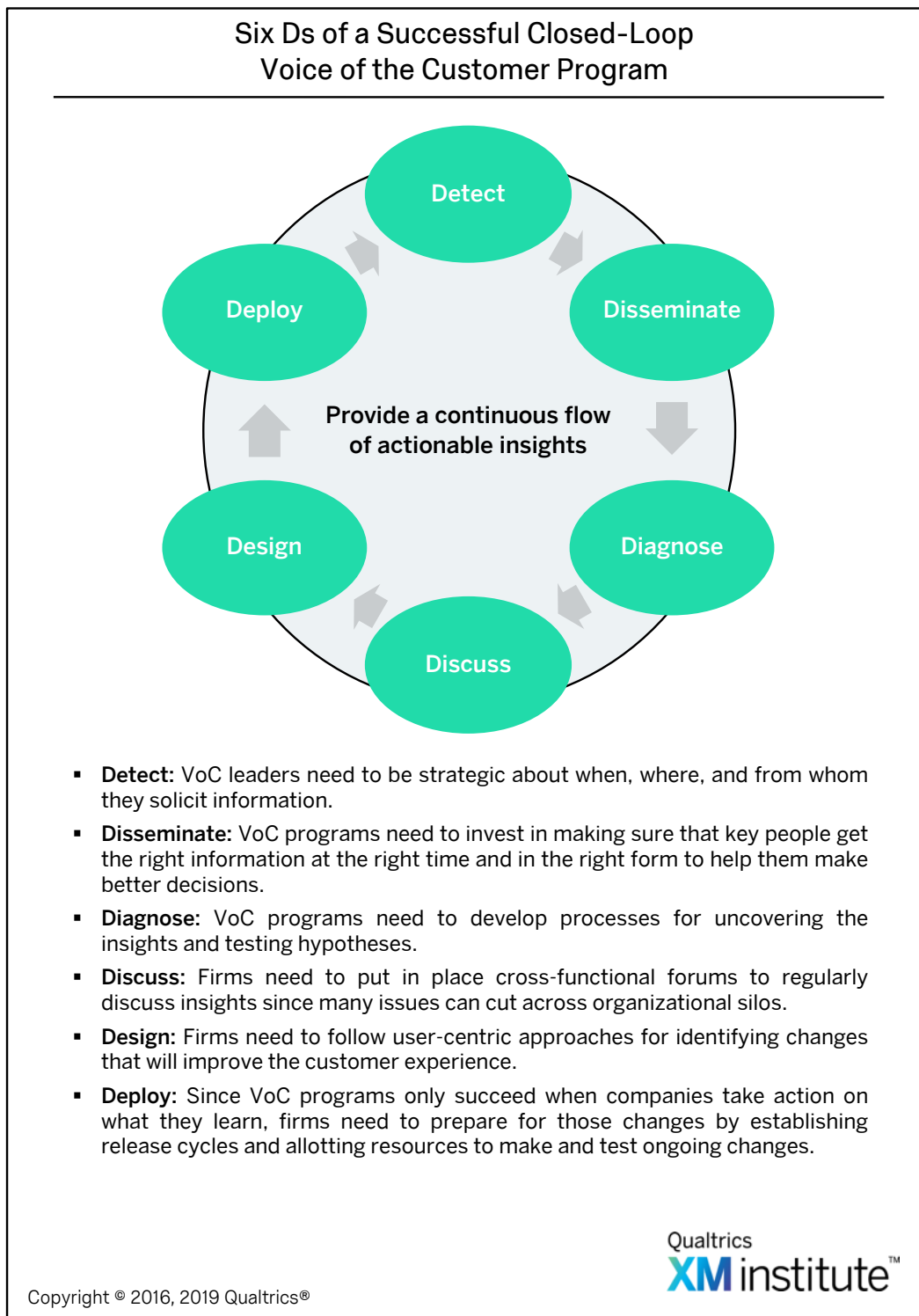## Six Ds of a Successful Closed-Loop Voice of the Customer Program

Detect

Deploy

Disseminate

Provide a continuous flow of actionable insights

Design

Diagnose

Discuss

- **Detect:** VoC leaders need to be strategic about when, where, and from whom they solicit information.
- **Disseminate:** VoC programs need to invest in making sure that key people get the right information at the right time and in the right form to help them make better decisions.
- **Diagnose:** VoC programs need to develop processes for uncovering the insights and testing hypotheses.
- **Discuss:** Firms need to put in place cross-functional forums to regularly discuss insights since many issues can cut across organizational silos.
- **Design:** Firms need to follow user-centric approaches for identifying changes that will improve the customer experience.
- **Deploy:** Since VoC programs only succeed when companies take action on what they learn, firms need to prepare for those changes by establishing release cycles and allotting resources to make and test ongoing changes.

Qualtrics
XM institute™

Copyright © 2016, 2019 Qualtrics®

Figure 4

Using Community Insights Across
The 6D's of a VoC Program

6D's	Role of Communities
Detect Take a strategic approach to when, where, and from whom you solicit information.	• Include key customer segments in communities • Seek regular input for ongoing decision-making • Solicit feedback on a wide range of topics
Disseminate Make sure that key people get the right information at the right time and in the right format to drive better decisions.	• Generate a flow of community insights to supplement periodic surveys and reports • Use creative outputs (e.g. images and video) to highlight community learnings
Diagnose Develop processes for uncovering insights and testing hypotheses.	• Probe problems that surfaced in other channels • Support discussions on key topics areas • Combine community insights with internal data
Discuss Put cross-functional forums in place to regularly share insights since issues cut across silos.	• Develop community governance based on cross-functional needs • Share peer-to-peer problem solving best practices • Encourage employee participation in forums
Design Follow user-centric approaches for making changes that will improve the customer experience	• Work with community to ideate solutions • Iterate redesigns with community input • Co-create solutions to known pain points
Deploy Prepare for taking action by establishing release cycles and allotting resources to make, test, and monitor ongoing changes.	• Identify issues from new releases and upgrades • Update community members about status of upcoming product or service enhancements

Qualtrics
XM institute™

Copyright © 2016, 2019 Qualtrics®

Figure 5

Community Best Practices
Across the Five Customer Insight Trends

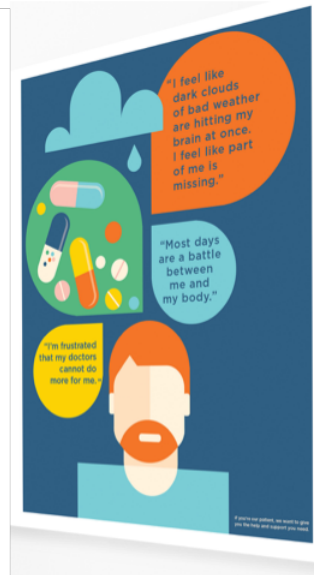| Customer Insight Trends	Community Best Practices
Deep Empathy, Not Stacks of Metrics *Tap into qualitative methods to uncover richer insights*	▪ Identify latent pain-points ▪ Use creative outputs ▪ Employ in-depth activities ▪ Involve cross-functional stakeholders
Continuous Insights, Not Periodic Studies *Continuously educate the company about problems and opportunities*	▪ Provide feedback across silos ▪ Encourage top contributors ▪ Support real-time feedback ▪ Manage issue escalation
Customer Journeys, Not Isolated Interactions *Analyze and frame findings in the context of customer goals and their paths to achieving these goals*	▪ Promote non-customer participation ▪ Understand the broader context ▪ Offer proactive assistance ▪ Connect online and offline ▪ Involve employees across the lifecycle
Useful Prescriptions, Not Past Descriptions *Optimize helping the company make decisions to improve the business*	▪ Involve the community in redesigns ▪ Respond rapidly to customer questions ▪ Co-create new products ▪ Operationalize best practices
Enterprise Intelligence, Not Customer Feedback *Combine customer feedback with insight sources across the company*	▪ Create an account-level view of community activity ▪ Tie community insights to behaviors ▪ Validate issues identified in other channels

Qualtrics
XMinstitute™

Figure 6

Figure 7

Acer Community Expert (ACE) Program For Top Contributors

acer | ACEs
Acer Community Expert

What is the Acer Community Expert (ACE) Program?

Acer believes expert members who regularly contribute quality content, are friendly and helpful to others, and serve as leaders in the community deserve special recognition. Ensuring that these top contributing members are acknowledged and commended for their efforts is what the ACE program is all about.

Members of the program receive a special icon next to their username to proudly display on their posts and profile page to let everyone know they're an ACE. There are three levels that a program member can achieve based on their level of contribution:

★ ACE = Pioneer ranking where all new ACE Members start.

★★ ACE = Pathfinder ranking is earned through consistent dedication and quality contributions to the Community.

★★★ ACE = Trailblazer ranking. Only the best and most dedicated earn these top honors.

How do I become an ACE? ← Eligibility criteria for the ACE Program

If you are reading this, you are already on your way! Join the Acer Community and start helping others, that's how all ACEs started. Keep in mind, the ACEs are our most passionate, knowledgeable and valued contributors. To become one, you'll need to meet some basic criteria:

1. Contribute consistently: Visit and participate on a frequent basis
2. Be helpful: Set a model of excellence in the community through your interactions with others
3. Provide solutions: You don't have to be a tech guru to be an ACE. However, ACEs must be able to help others resolve problems by providing insightful content and solutions.

How are the ACEs selected?

1. Members are selected by the Acer Community Team on an invite-only basis. You cannot "rank-up" into the program. We monitor the contributions of all members and carefully consider a broad range of factors including those in the above criteria. New inductees will receive a private invitation to join the program from a member of the community team.
2. Community members can nominate top contributors to become an ACE. Simply send your nominations via private messenger to a member of the community team.

Do I get anything if I'm selected as an Acer ACE?

Yes! As an ACE, you'll get a special badge that you can display with your forum rank. You will gain access to private segments of the Acer Community and you may also receive occasional non-cash awards from Acer to thank you for your participation.

One last thing! All ACE members gain special access to Acer's best new products! Thats right. The Acer Product Evaluation Program (APEP) allows ACE Members to voluntarily evaluate great new Acer products in the comfort of their own home at absolutely no cost to them. What could be better! APEP is just another benefit of becoming an ACE team member.

Get started today and chances are good you can be a part of this exclusive team!

Details of the rewards for community members who become an Acer ACE

Qualtrics
XM institute™

Figure 8

Figure 9

Questions For Determining Online Community Strategy

Which is the primary purpose of the community?
- ❑ Customer support
- ❑ Product ideation
- ❑ Co-creation
- ❑ Marketing strategy
- ❑ Customer success

Who do you want to participate in the community?
- ❑ All customers
- ❑ Targeted subset of customers
- ❑ Prospects
- ❑ Partners
- ❑ Industry thought-leaders

Which internal teams need to be involved?
- ❑ IT
- ❑ Product Development
- ❑ Marketing
- ❑ Account Management
- ❑ Customer Success
- ❑ Creative
- ❑ Customer Insights

What other internal data can be combined with community insights?
- ❑ VoC (surveys, focus groups, etc.)
- ❑ Website (digital analytics, intercept surveys)
- ❑ Contact Center (post-support survey, speech analytics)
- ❑ CRM or customer database (comprehensive customer data)

How do we want to manage the community?
- ❑ Internal existing resources
- ❑ Hire new resources
- ❑ External vendor management
- ❑ Combination of internal and external

Qualtrics
XM institute™

Figure 10

Types of Online Customer Communities

	What it is	When to use
Open or public	Community is available to anyone: customers, non customers, competitors. Anyone can view post and participate	▪ Use as a support channel ▪ Increase awareness of brand or product ▪ Support thought-leadership ▪ Drive SEO based on discussions
Closed or private	Specific customers or partners invited to participate. Community not open to the general public	▪ Use when discussing a highly confidential topic ▪ Maintain control over who participates
Open with gated or private forums	Anyone can join, but specific sections are only available to a subset of members (users of specific product, customers, etc.)	▪ Want to hear from customers who have or use certain products ▪ Guide deeper dive problem discussions ▪ Beta test new products
Panels	A group of customers that primarily interact with the company (not each other) by responding to surveys	▪ Want a small, readily available survey sample ▪ Minimize recruiting costs and time for research

Qualtrics
XM institute™

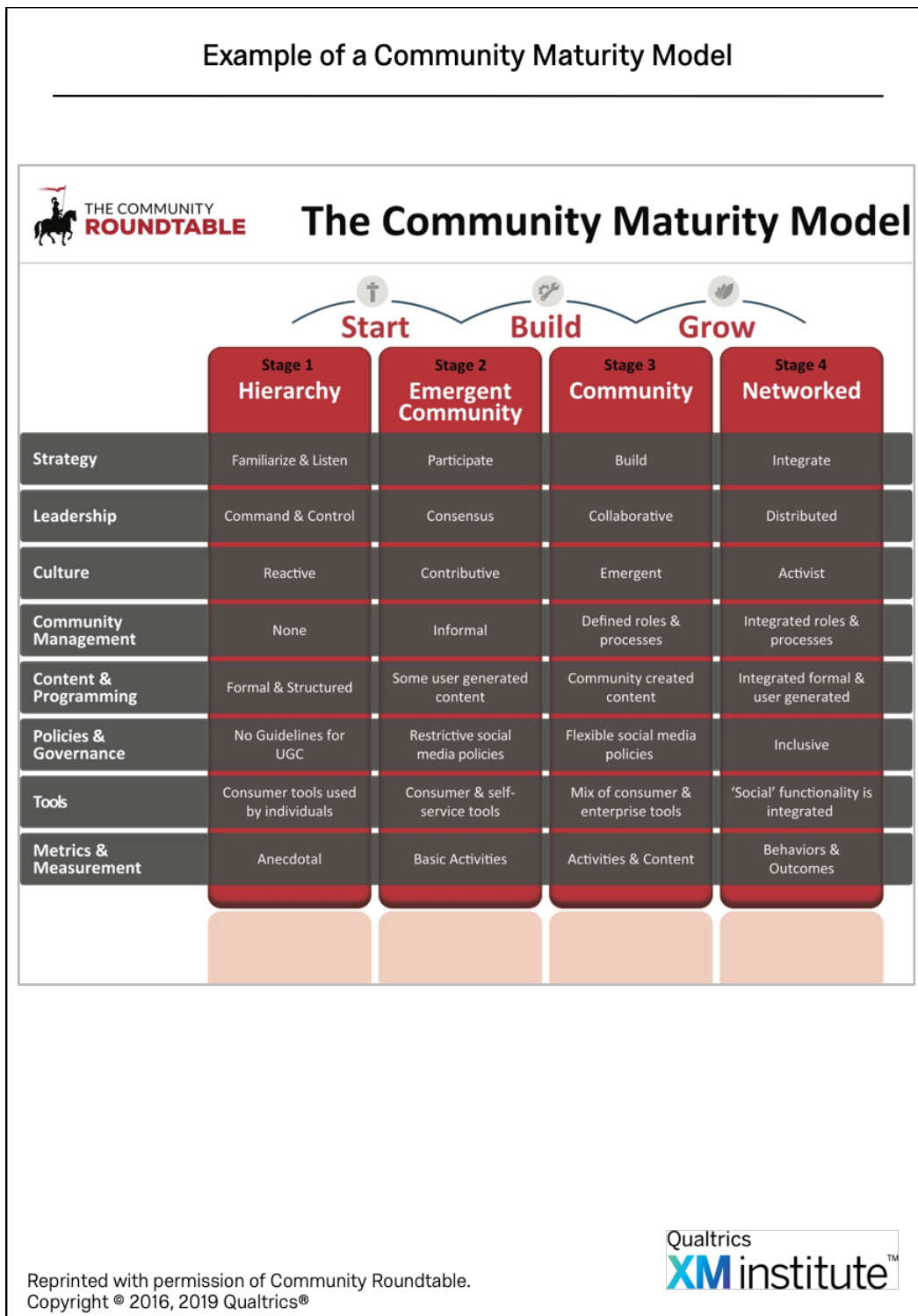Figure 11

Example of a Community Maturity Model

	Start		Build		Grow	
	Stage 1 **Hierarchy**	**Stage 2** **Emergent Community**	**Stage 3** **Community**	**Stage 4** **Networked**
Strategy	Familiarize & Listen	Participate	Build	Integrate
Leadership	Command & Control	Consensus	Collaborative	Distributed
Culture	Reactive	Contributive	Emergent	Activist
Community Management	None	Informal	Defined roles & processes	Integrated roles & processes
Content & Programming	Formal & Structured	Some user generated content	Community created content	Integrated formal & user generated
Policies & Governance	No Guidelines for UGC	Restrictive social media policies	Flexible social media policies	Inclusive
Tools	Consumer tools used by individuals	Consumer & self-service tools	Mix of consumer & enterprise tools	'Social' functionality is integrated
Metrics & Measurement	Anecdotal	Basic Activities	Activities & Content	Behaviors & Outcomes

Qualtrics
XM institute™

Figure 12