

HIGHER LOGIC'S COMMUNITY IMPLEMENTATION GUIDE



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INTRODUCTION

YOUR COMMUNITY PARTNERSHIP WITH HIGHER LOGIC

Based on our work with thousands of customers, Higher Logic has established a methodical, proven process to ensure every customer builds and grows a successful online community. Our Implementation Team guides you through the process with an interactive, step-by-step checklist, and helps you craft an implementation plan and community site strategy that makes the most sense for your organization.

**WE UNDERSTAND IT'S IMPORTANT TO ACHIEVE
AND SUSTAIN SUCCESS.**



Discovery Meeting

LEARNING MORE TOGETHER

Like any new relationship, it's important to start with the basics. As a new customer, we introduce you to your dedicated Project Manager, who will lead the process of learning about your organization's needs and goals for your new community. Your PM walks through how to use the products, modules, and apps you just purchased. They're also your go-to resource for anything and everything Higher Logic! They'll work closely with you to answer questions, troubleshoot, and successfully launch your community (typically a three- to six-month process).

Let's break up this planning phase into two parts:

- Your organization's Community Project Team
- Your Community Goals

PEOPLE FIRST

Assessing a Community Project Team

- 1. How is your organization structured?**
 - Who will be on this project team?
- 2. Who will be accessing your HL site?**
 - Who are your users or members?
 - How many active records are in your database?
- 3. Is this site replacing a current collaborative platform(s)?**

BEGIN WITH THE END IN MIND

Assessing the Project's Community Goals

- 1. What are your goals for your Higher Logic site?**
- 2. When do you want to launch your site?**
 - A typical implementation timeline is 12 weeks with a recommended beta testing period
- 3. Any other critical details we should know?**



This Discovery Meeting is a fun place to start – we get the opportunity to learn about each other, as well as carve out a structured plan for how to make the new community a success from the beginning.



The Implementation Process

Every customer's community and organizational goals vary - but they should always align. We've been around the community block enough to know what works. That's why we developed a tried and true implementation process that includes both best practices and flexibility.

Standard Implementation Timeline



Higher Logic’s recommended **7-step timeline** for any community, from discovery to launch.

7-STEP IMPLEMENTATION SUCCESS TIMELINE

STEP 01 Discovery

Your assigned Project Manager will lead the process of learning your organization's needs and goals for your new community site.

Stay on track:

When is this scheduled?

Date: _____

Follow up:

What's our homework?

STEP 02 Design

We'll help you personalize your site and walk you through our intuitive design tools. Strapped for time or resources? We have a slew of great partners and vendors to help – you provide the elements, they'll provide the design.

Stay on track:

Do we have all the tools and resources we need to brand our Higher Logic site?

Follow up:

Who's designing and what are the next steps?

STEP 03 Integration

We can import data from your CRM/AMS/database to populate user profiles, security/permissions groups, and communities, all of which can be controlled from your database.

Stay on track:

Have we reviewed our databases and any other vendors with Higher Logic?

Follow up:

Revisit our implementation checklist – do we have outstanding integration questions?

STEP 04 Beta Testing

Your staff and beta-users will begin using the community to increase their familiarity with how everything works. We will gather their feedback and implement changes as needed.

Stay on track:

Chat with your project manager about HL's best practices on beta testing – we'll walk you through the steps.

Follow up:

Do we have questions on:

- ☐ Beta testing tips
- ☐ How to use the CMS
- ☐ Security/permissions groups

STEP 05 Initial Launch

Our best practice is initially launch your site with core functionality and an all-member open forum (or a few large communities).

Stay on track:

Is our list of seed questions complete?

Follow up:

Do we have a set schedule for initial launch and engagement tactics?



THERE'S A MODULE FOR THAT!

Download our guide to see how specific add-on modules can work together, compliment your objectives, and drive a better community experience.

STEP 06 Adoption

Once the initial open forum or communities are up and running, we'll configure any additional modules you may have purchased.

Stay on track:

Have we reviewed additional modules and corresponding launch schedules?

Follow up:

Are we still beta testing? This means contributing beyond seed questions – we want to see growth in organic content!

STEP 07 Expansion

About one month after launch, we'll conduct a full site review together to assess how community members are engaging with your site. If you're meeting the benchmarks we established in that discovery phase, we will recommend next steps: launching additional modules and opening up the next wave of communities. If you're not seeing the engagement levels you desire, we'll recommend tactics to help draw more members in to your online community.

Stay on track:

When is this scheduled?

Date: _____

Follow up:

What's our homework on:

- ☐ Checking out additional modules
- ☐ Planning for new communities

Implementation: Next Steps

New customers usually have a short To-Do list after the Discovery Meeting. Here's an example of what you can expect:

MY COMMUNITY PROJECT TEAM TO-DO'S

- ☐ Join HUG and explore the resources
 - [HL Academy Online Courses](#)
 - [HL Academy Live Events](#)
- ☐ Complete Higher Logic's technical worksheet
- ☐ Choose a community site URL
- ☐ Gather design elements: logo, hex color codes, favicon (optional)
- ☐ Know exactly who and how to get in touch with our team:
 - [Your Primary Contact](#)
Implementation Project Manager
Floyd Frog
floyd@higherlogic.com
 - [Support](#)





YOUR COMMUNITY'S TECHNICAL INFORMATION

One distinct feature of Higher Logic's online community platform is our ability to integrate with the most popular databases, association management systems (AMS), and customer relationship management (CRM) platforms. Web services and API-based integrations allow your current relationship management system to serve as the backbone of your user data. Changes to user records made in your relationship management system are effortlessly synchronized with your community.

For detailed technical specifications on integration, please visit:
<https://www.higherlogic.com/services/integrations>





Checking In: Community Roles and Responsibilities

Based on our implementation timeline, both Higher Logic and your project team have separate and convergent tasks for starting this community. Review our checklist on the next page for a summary of roles and responsibilities on everything from configurations and mastering the CMS to general guidance and engagement strategies.

Implementation Partnership Checklist

HIGHER LOGIC IMPLEMENTATION TEAM

- ☐ Advise on optimal configurations for your organizational needs

NOTES: _____

- ☐ Deliver fully functional community site you can personalize/customize

NOTES: _____

- ☐ Support you through data integrations

NOTES: _____

- ☐ Conduct project status meetings: design, CMS overview, security, launch, engagement

NOTES: _____

- ☐ Provide general guidance on implementation process and product questions

NOTES: _____

YOUR ORGANIZATION'S PROJECT TEAM

- ☐ Partner with us on data integrations

NOTES: _____

- ☐ Develop and apply community designs

NOTES: _____

- ☐ Master the CMS to personalize/customize your site

NOTES: _____

- ☐ Don't forget: [HL Academy](#), [HL Support](#), and [HUG](#)

NOTES: _____

- ☐ Generate seed questions, launch schedule, and engagement strategies with us

NOTES: _____



Higher Logic Education and Ongoing Training

Let's be honest: we're only successful if our members and customers are successful. And to reach any level of success, we need a bit of confidence. That's why we offer so many (FREE) opportunities for education, training, and product support.

HIGHER LOGIC USER GROUP (HUG)

The Higher Logic User Group (HUG) is our very own online community. It helps you get the most out of your community platform by connecting you with Higher Logic customers, partners, and experts. HUG is home to interactive discussion groups, resource libraries, webinars and online trainings, and all our upcoming events. Ask questions, share stories, and learn with each other. HUG is your home.

COMMUNITY MANAGEMENT

The most successful communities are run by community managers who are well versed in both best practices and our software. You might be lucky enough to have that community manager on board, or you're training up staff members to become your very own community experts. Maybe you're interested in finding out more about HL's Managed Services or hiring one of our expert community managers to help with implementation.

WHO CAN JOIN HUG?

Any staff members at your organization can join HUG. "The more, the merrier," is our philosophy. Please encourage your colleagues to join HUG to learn more about Higher Logic communities.



Make HUG a Habit ➔

NEW ADMIN?
Start Here

HUG BUZZ

RESOURCE LIBRARY
Client Examples

HIGHER LOGIC ACADEMY

Learning never stops at Higher Logic, and we know learning together is essential for your success. That's why we built a learning and community portal where you can take courses online, register for in-person training, attend webinars, unlock achievements, and connect with fellow learners and trainers, all while having fun.

It's all crafted around your community journey, whether you're in the implementation phase, a new community user, or may need an extra boost to take community engagement to the next level.

OUR FAVORITE HL ACADEMY RESOURCES

[Customize Your Learning Journey](#)

[Academy Live Tracks](#)

[Online Challenges: Go Ahead, Test Yourself!](#)



CHECK OUT

Higher Logic Academy



HIGHER LOGIC SUPPORT

It's our mission to provide excellent customer service at every stage – no exceptions once your community is launched! Higher Logic Support is your point of contact for product questions, supplementary resources, and support-related issues.



EXPERT COMMUNITY TRAINING COURSES

Online communities are diverse, and so is the field of community experts! We believe it's important to partner with community thought leaders who are innovating in the space and who collectively have more experience than we do. The following training courses are offered exclusively through Higher Logic partnerships:



CMX Training Program

The CMX Training Program is a six-week course, ideal for anyone who is new to community or feeling stuck in their community strategy. With a student completion rate of over 95 percent, this program has helped hundreds of businesses put together a plan for building thriving communities that deliver real business value. Brought to you by CMX, the hosts of CMX Summit and the hub for the community industry.



FeverBee Online Community Training Course

FeverBee's professional community management course is a detailed and comprehensive on-demand course created for our Commercial clients as part of their software subscription. Twelve individual lessons guide organizations through the entire process of launching, growing, and managing a successful online community. FeverBee is a leading online community consultant, combining a proven commitment to their clients' success and a reputation for innovation.



Essentials of Online Community Management

Online Community Results and SocialFish provide their Essentials of Online Community Management course to all our Association clients as part of the software subscription. It's an on-demand course with five, 30-minute lessons, designed for community managers and the senior executives who oversee online community initiatives. The curriculum covers best practices in setting strategy, going live, sustaining engagement, managing risk, and ROI & reporting.

HIGHER LOGIC SUPER FORUM (ANNUAL CONFERENCE)

Super Forum is our **premier community and marketing automation event** for customers, partners, community and marketing enthusiasts to gather all together for three days of exclusive training, educational sessions, and networking. Join us for everything from product updates and content to industry keynotes and our annual customer appreciation party.

CHECK OUT
Higher Logic Super Forum



CONCLUSION

ACHIEVE AND SUSTAIN COMMUNITY SUCCESS

As we said at the beginning: community is a partnership. We aim to provide every customer with all the tips, tricks, and tools they need to build and maintain a successful online community. This implementation guide is meant to be referenced and marked up with notes – please use it as a guide for your implementation journey with Higher Logic.



