

Community Building & Marketing — Workbook

This workbook turns the course into the working documents of an actual community launch. Each section mirrors one course module with hands-on exercises, fill-in worksheets, and checklists you apply to your own community. Pick one real community you are launching or reviving and carry it through every section, and you will finish with a community charter, a scored platform decision, a first-week onboarding flow, a four-week engagement calendar, a code of conduct and moderation playbook, and a health dashboard that links membership to retention.

Foundations: Strategy, Platform, and Model

Decide why your community exists, who it serves, where it should live, and who the founding members are before you create a single channel.

Worksheet: Write Your Community Charter

Fill in each field in one or two sentences. This charter is the document you will use to make every later decision, so be specific and honest about the single outcome and metric.

Purpose sentence: this community helps [who] achieve [what outcome] so that [what business result]

Primary SPACES reason (Support, Product, Acquisition, Contribution, Engagement, or Success) and why

The one business metric the community is accountable for, with its current baseline

The 90-day target for that metric

North Star activity metric (e.g. weekly active contributors) and your starting number

Counter-metric you will watch to protect quality as you grow

The single member outcome that, delivered weekly, makes the community indispensable

Exercise: Score Your Platform Decision

Use the weighted-matrix method from the course to choose between Circle, Discord, Slack, and Facebook Groups. Do the math rather than deciding on feel, then pressure-test the winner.

- List 5 to 7 decision criteria from your charter and assign each a weight from 0 to 100 that sums to exactly 100.

- Score Circle, Discord, Slack, and Facebook Groups from 1 to 5 on every criterion, then multiply by the weights and total each column.

- Name the winning platform and write two sentences on why it fits your audience and your team's capacity.

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- Check the ownership trap: can you export members and reach them by email on this platform, and if not, is that acceptable for a retention-focused community?
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Worksheet: Plan Your Founding Cohort

Never open to an empty room. Plan the 20 to 50 hand-picked members who will seed the culture, and the activity they will see on day one.

Names or segments of 20 to 50 founding members to recruit by hand (engaged customers, beta users, superfans, generous peers)

The personal message you will send to invite them

The single first action you want each founding member to take within 48 hours

5 to 10 pre-seeded conversation starters so the space is never silent at launch

Launch gate decision: open, application, or invite-only, and why

Checklist: Foundations Readiness Check

- My charter names one primary SPACES reason, not all six.
- The community is accountable for one business metric with a baseline and a 90-day target.
- I have chosen a North Star activity metric and a counter-metric.
- I scored at least three platforms with a weighted matrix and can defend the winner.
- I have checked whether I own my members and data on the chosen platform.
- I have a list of 20 to 50 founding members and a plan to seed activity before public launch.

Onboarding and Activation

Turn the chaotic first session into a guided path that reliably produces a first contribution within the first week.

Worksheet: Define Your Activation Action and Target

Pick the one observable action that correlates with members staying, and set a target you will hold onboarding accountable to.

Your single activation action (e.g. posts an introduction, asks a first question, attends one event)

Why you believe this action predicts retention for your community

Activation target as a percentage and a timeframe (e.g. 60 percent within 7 days)

Where you will read this number (platform analytics, manual count, or a tracking sheet)

What you will do when activation drops below target

Exercise: Build Your First-Week Onboarding Flow

Design the staged welcome path from minute zero to day seven. Decide what is automated and what is delivered by a human at each step.

- Write the minute-0 automated welcome message that names the outcome and the single first action.

- Write the hour-1 start-here guide content and list your minimum viable set of 5 to 8 channels with one-line purposes.

- Draft the templated introductions prompt (name, location, what they are working on, what they want help with).

- Decide who personally replies to new introductions and how, then write the day-7 nudge for members who have not yet activated.

Exercise: Run a Friction Audit

Walk your own join flow as a stranger and remove every step that is not load-bearing.

- Count the clicks from joining to the first possible post and list each one.

- Mark which steps you will cut and which you will keep, with a reason for each.

- List two low-stakes first-contribution on-ramps you will offer (e.g. a react-only poll, a this-or-that question).

- Describe exactly how a first post will be publicly rewarded within minutes.

Checklist: Onboarding Launch Check

- I have one defined activation action with a percentage-and-timeframe target.
- The minute-0 welcome is automated and names a single first action.
- A pinned start-here guide answers what I get, what is expected, where to post, and the rules.
- The introductions prompt is templated, not an empty field.
- A real person replies to every new introduction in the first week.
- A day-7 nudge reaches anyone who joined but has not activated.

Engagement, Rituals, and Content

Build the recurring programming, prompts, and live events that keep members returning week after week.

Worksheet: Design Your Engagement Rituals

Choose a small set of strong, repeatable rituals rather than a noisy stream of one-off posts. Define the format once so you can run it on a schedule.

Daily ritual (a light prompt or check-in) and the channel it lives in

Two or three weekly anchor rituals (e.g. wins thread, goals thread, live call) with day and time

Monthly ritual (e.g. member spotlight or AMA) and how members are chosen

Quarterly energy spike (a 7 to 30 day challenge) with its goal and daily action

Always-on evergreen prompts pinned to invite contribution at any time

Exercise: Write Five Conversation-Sparking Prompts

Draft prompts engineered for replies, not likes. Test each against the course rules: a question with many answers, an easy one-word entry point, and a personal opener.

- Write a question prompt that has many valid answers rather than a yes or no.

- Write a low-effort prompt whose easiest answer is a single word, emoji, or pick.

- Write a prompt that opens with something personal or specific to model vulnerability.

- For each prompt, note how and how quickly you will reply to early answers to keep the thread alive.

Worksheet: Plan One Live Event or Challenge

Design a single synchronous moment to create an energy spike, with promotion and follow-up planned in advance.

Format (office hours, member-led workshop, AMA, coworking, or a timed challenge)

Date, time, duration, and platform

Promotion plan: when you announce, where you pin it, and the same-day reminder

For a challenge: the goal, the duration in days, the daily action, and where progress is posted

Follow-up: how you will record or recap and how you will celebrate finishers or attendees

Checklist: Engagement Health Check

- I run a small number of strong rituals, not too many threads spread thin.
- My calendar has daily, weekly, monthly, and quarterly beats mapped out.
- My prompts ask questions and offer a one-word entry point.
- I reply quickly to early answers so threads feel alive and safe.
- Each event is promoted ahead of time, pinned, and reminded the same day.
- I am shifting from host-generated toward member-generated content by spotlighting members.

Moderation, Metrics, and Retention

Govern the community fairly, measure its health weekly, and prove its impact on loyalty and lifetime value.

Worksheet: Draft Your Code of Conduct and Consequence Ladder

Write rules in plain language and make enforcement predictable. Adapt a proven template such as the Contributor Covenant to your audience.

Expected behavior, stated as a short list of positive norms

Prohibited behavior, stated plainly

Consequence ladder: warning, then temporary mute or suspension, then removal

How members report a problem and who receives the report

Who your volunteer moderators are and the escalation path between them

Exercise: Configure Your Moderation System

Decide what tools handle volume and what humans handle judgment, so moderation scales past a few hundred members.

- List the automod rules you will enable (spam, links, banned words) and the tool you will use, such as AutoMod, MEE6, Carl-bot, or native Circle or Slack controls.
 - Define who handles routine reports versus serious escalations, and the response time you commit to.
 - Describe how and where moderation decisions are logged so the team stays consistent.
 - Write the rule you will hold even your highest-status members to, to prove enforcement is even.
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Worksheet: Build Your Community Health Dashboard

Choose the handful of weekly metrics that reveal whether the community is alive and growing, and where you will read each one.

Weekly active contributors (your North Star) and where you read it

Contributor-to-lurker ratio and how you calculate it

Member-initiated conversation share and how you estimate it

New-member activation rate within 7 days

Retention at 30, 60, and 90 days by cohort

Qualitative signal you track (community NPS, sentiment, or a recurring pulse survey)

Exercise: Run the Retention and Win-Back Analysis

Prove the business case by linking community participation to churn and lifetime value, and build the loop that recovers fading members.

- Define a consistent rule for tagging a customer as community-active versus not.
 - Describe how you will compare churn, retention, and LTV between the two groups over the same window.
 - List the disengagement signals (no login or no post within a set window) that trigger a win-back action.
 - Write the re-engagement message or action you will send when a member crosses a disengagement threshold.
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Your Action Plan

1. Write your one-page community charter: purpose sentence, SPACES reason, business metric and 90-day target, North Star, and member outcome.
2. Score Circle, Discord, Slack, and Facebook Groups with a weighted matrix and commit to one platform, checking you own your members and data.
3. Recruit 20 to 50 founding members by hand and pre-seed 5 to 10 conversation starters so the space is alive before public launch.
4. Build the first-week onboarding flow: automated minute-0 welcome, pinned start-here guide, templated introductions prompt, and a day-7 nudge.
5. Run a friction audit and cut every non-essential step between joining and the first post, then add two low-stakes contribution on-ramps.
6. Map a four-week engagement calendar with daily, weekly, monthly, and quarterly rituals, and stock a prompt idea bank.
7. Schedule and promote one live event or a 7 to 30 day challenge, including a same-day reminder and a follow-up recap.
8. Publish a plain-language code of conduct with a consequence ladder, recruit volunteer moderators, and configure automod.
9. Stand up a weekly health dashboard tracking active contributors, contributor ratio, member-initiated share, activation, and 30/60/90-day retention.
10. Run the community-versus-non-member retention and LTV comparison, build a win-back loop, and report progress against your charter metric each quarter.

