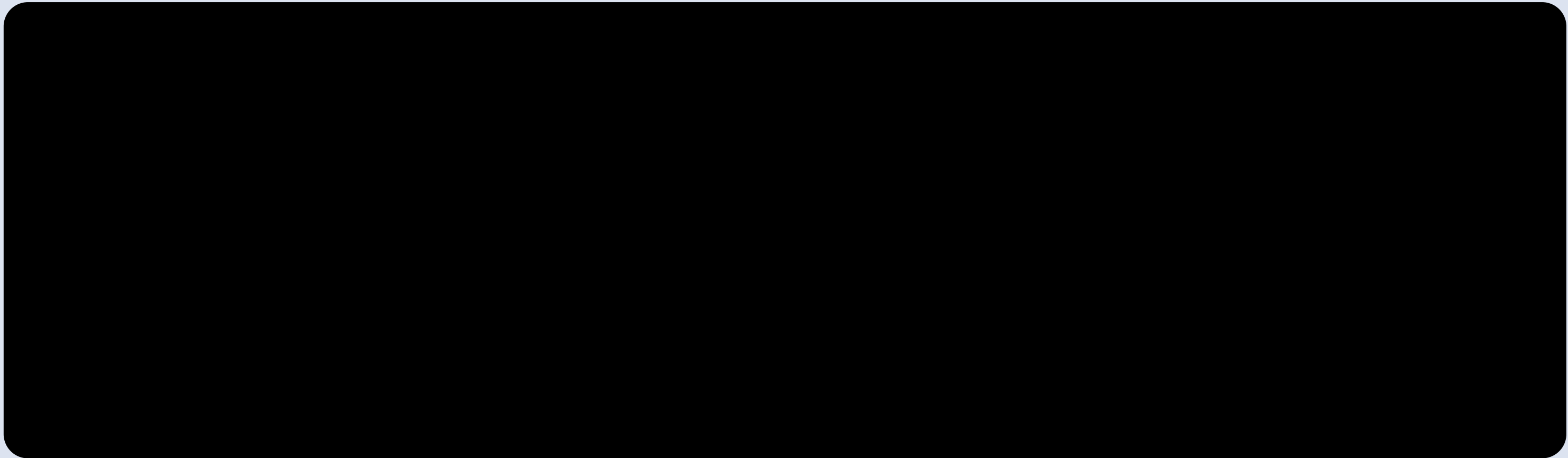



2021



A synthesis of insights and recommendations to develop  Community, based on workshops conducted by Montage Learning.

Summary

Our Process

Together, [REDACTED], co-designed during 3 workshops to focus a vision and develop potential solutions for [REDACTED] Journey. First, we created empathy for our expert through empathy mapping. Then understood their current [REDACTED] journey, and the moments that mattered (MTM) along it. Followed by prioritization of those MTM, brainstorming solutions to obstacles, and redrawing our expert's journey using a service design model with that solution in place.

Our Focus

Sam (our Expert) has a highly sought skillset **AND** comes across many opportunities, **BUT** is not sure how, when, or what is needed to leverage these opportunities, **THEREFORE** [REDACTED] provides a platform where Sam can easily learn how.

Montage uses the And, But, Therefore (ABT) model (developed by Randy Olson) to frame a problem or obstacle in a story format.

Workspace

- [REDACTED]
- [REDACTED]
- [REDACTED]

Outputs

From the Process

Here is a list of deliverables that are included in this document showcasing, the co-designed items during our workshops as well as synthesized insights and recommendations from Montage. You will find our suggestions for solutions or implementation throughout.


Deliverables

- 01** User Persona - Sam
- 02** Current User Journey
- 03** Dream Up - Solution Components
- 04** Revised Ideal User Journey
 - Swimming in the Ecosystem
 - Community Member
 - Expert Profile
 - Expert
 - Project
- 05** Build Journey
- 06** Recommendations
- 07** Wrap Up



User Persona

Hi, my name is Sam

Sam is our  Expert. They have a specific skillset in the Salesforce ecosystem. They have demonstrated competence and prowess to their peers and community. They may have or are looking to start their own business focused on this skillset.



01

Pain

Sam worries about the longevity of being in business for themselves

Sam has doubts about trusting other platforms with project frequency and on-time payment

Sam is concerned they lack the knowledge or support to be in business for themselves

Gain

Sam is a problem seeker - enjoys a challenge in developing a solution and helping others to overcome obstacles

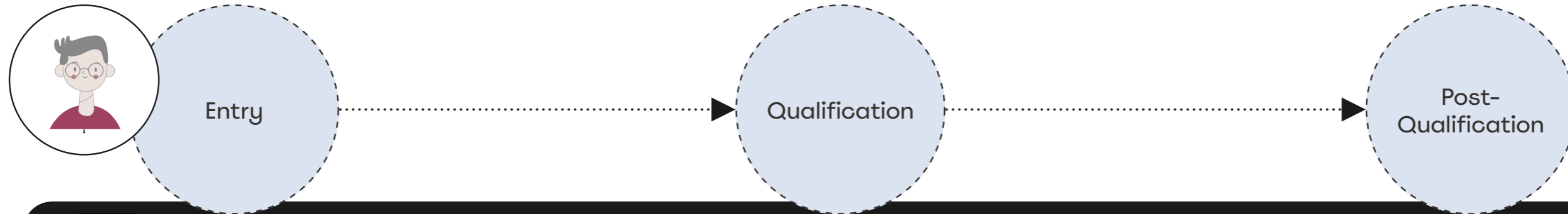
Sam enjoys the work/life balance Work-From-Home (WFH) offers, measured by quality time

Sam easily builds a long term relationships with clients and partners based on their consultant mindset, which can translate into repeat business opportunities



User Journey

Sam's Current Journey



Goal

wants Sam to show interest through either a referral or by filling out the entry survey.

Sam is either referred by a and reaches out directly OR submits survey, doing light research, waiting to hear more.

Sam completes onboarding; waiting for potential project work OR is qualified for project work.

Obstacle

Sam is unaware of what being a expert really means and is not sure if skillset aligns; fears the risk of stability.

Sam feels they don't have enough independent work experience to work on a OR they feel unprepared for the qualification process.

Sam is uncertain about taking a project because of the pay and their availability; while on a project, Sam may be uncomfortable with certain aspects of a project beyond their skillset.

Need

Sam needs an easy way to learn about process, and then take action (e.g. survey)

Sam needs a way to prepare for their interview with understand what is required, types of projects, alignment of skillset).

Sam needs a way to feel supported and given opportunities to collaborate with fellow experts.

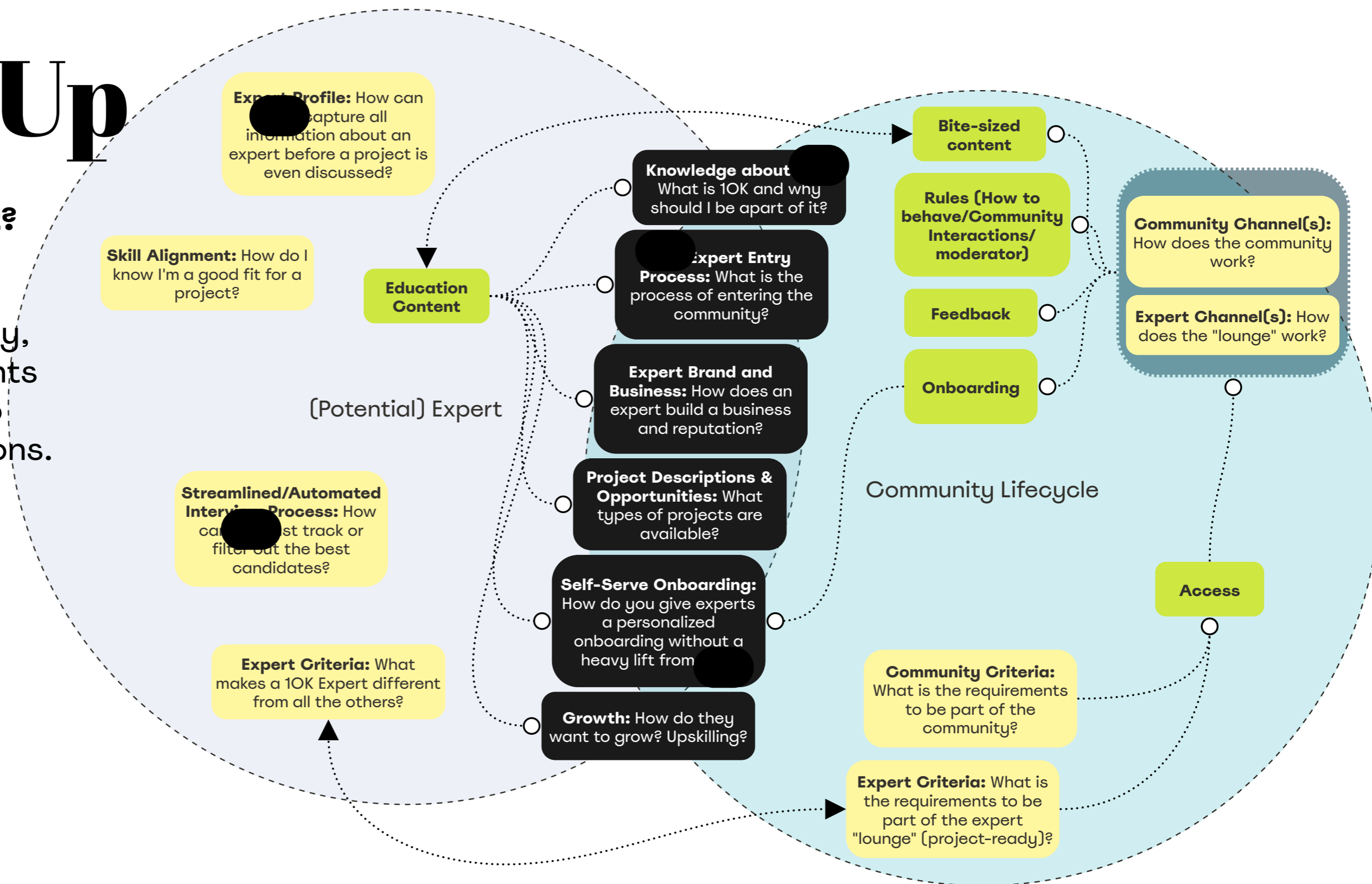
02



Dream Up

What to Work on First?

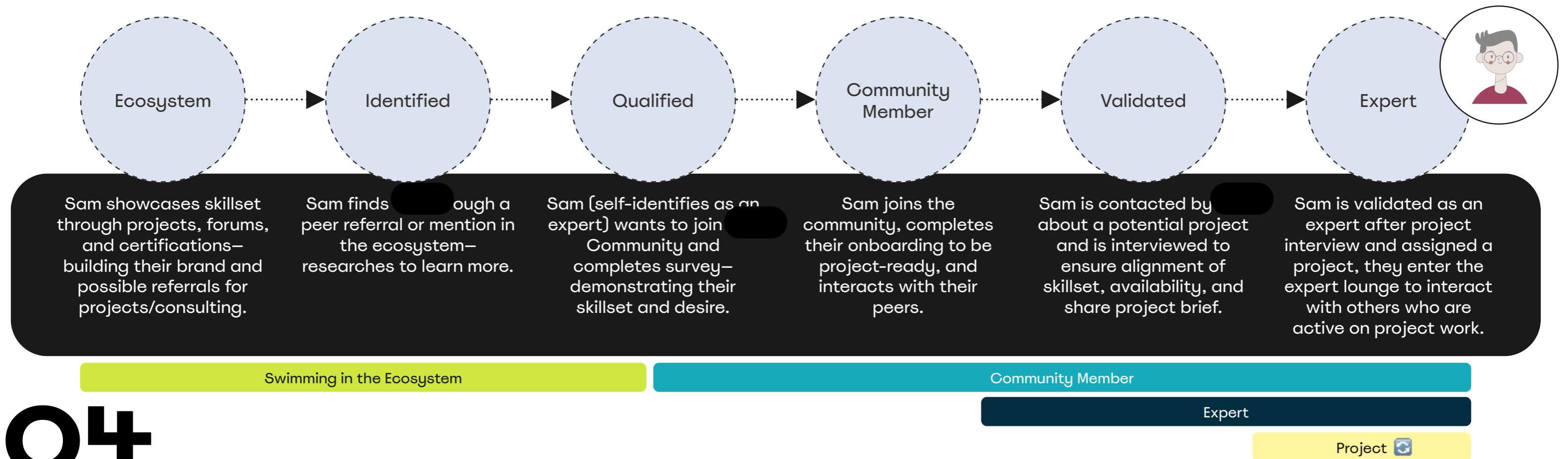
We prioritized different aspects of their journey, focusing on the Moments that Matter, in order to ideate potential solutions. Here are the different components of such a solution that address Sam's obstacles and needs.



Revised Journey

Sam's Ideal Journey

This new journey adopts components of the solution—below are the different lifecycles embedded in the journey. Following this diagram, lifecycle details follow, including recommendations for implementing.



04



Swimming in the Ecosystem

From Ecosystem to Identified

To help engage and encourage Sam to take action, [redacted] may consider what could be made available publicly on their website to kick-start their [redacted] Journey.

Education Content

What to Build

Community Description: What is discussed, what might they learn, what does it feel like

Community vs Expert Criteria: What is the criteria/difference between joining the community vs becoming an expert

Working with [redacted] What is it like working with [redacted] What can an expert expect?

[redacted] Expert Evangelist: If not a referral, can a potential expert speak with a current expert about their experience?

Types of Experts: What type of expert are you looking for? Like a job description, experts can easily self identify - this may help with referrals too

Public Onboarding: What pieces of information from current [redacted] onboarding can be public? For engagement, advertising, and to begin an expert's journey earlier - make them feel as if they are already part of the community and just need to fill out the survey.

***Note:** Potential or recommended components are enclosed in the yellow box like this.

Community Member

Joining the Community

How can [redacted] make the transition from survey into the community smooth and automated for Sam, a potential expert?

Here we identify potential components to make the jump from Qualified to Community Member.

What to Build



Revised Survey: What information can you gather from potential experts before they even enter the community?
Include: Questionnaire, Skills Matrix, Upload Resume

Expert Profile: Like other social and community based platform, have community members fill out their Slack profile - this can be included in the onboarding actions.

Expert Brand and Business Enablement: Help community member grow their brand and business into 10K Expert-readiness through small business learning content.

Slack Channels: Create different channels like:
introduce-yourself
social
general
ecosystem-resources
small-business

Self-Serve Community Member Onboarding: Community members complete the required information without needing to interact with [redacted] Slack bot or online learning.

Channel Etiquette: Include this in each channel description. How do community members communicate, behave, and how to report? What are the rules?



This accelerates the interview process when community members become an expert per project-readiness.

Pieces of Expert Profile outlined follows this information.

*Expert Profile

Help Introduce Sam

Currently: Sam builds a profile on the [redacted] platform over multiple steps (survey > interview > resume).

Recommend: As part of the criteria for a [redacted] expert at the very beginning of interacting, gather more information.

Result: Less back and forth for Sam and [redacted] has all their information even before a potential project.

Identified > Qualified > Community

Sam fills out survey to show interest and submit their qualifications to be part of the [redacted] Community.

At the point of taking the survey:

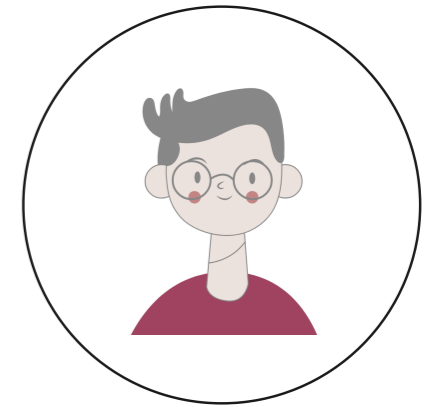
- Fill out **Skills Matrix**
- Request **current Resume**
 - If they don't have current resume, provide 1OK template version for them to fill out.

The [redacted] Community

Sam enters the 1OK community.

Part of the onboarding into the community:

- Experts fill out **Slack User Profile**
 - Some recommended fields: Name, Public email, Website, Social (LinkedIn, Twitter, etc), About me, Joined [redacted] Community (Date), Location, How to get into contact, Expertise, Hobbies



What to Build

[redacted] Resume Template

[Slack User Profile](#)

Expert

Streamline Validation

How can [X] make the transition from community member to project-readiness expert easier for Sam and themselves?

Here we outline components to make the interview process streamlined and consistent - previous components would help gather information like resumes before handed so the interview is focused on the project. Also, the shift from community to expert "lounge" and working on a project requires supports.

What to Build



Interview Discussion Guide:

Streamline and maintain consistent interviews - gather the right information from an expert for a project. Keep up-to-date notes on an expert.

Expert Criteria: What makes a [X] Expert different from other community members? Why are they project-ready?

Project Description:

Advertise the project to the expert - make sure they feel that their skillset aligns with the project and that it will be successful.

[X] How-to Interview an Expert: Instructions for other [X] members on how to run interviews with experts for projects and provide the necessary information.

Expert How-to Get Ready for Your Interview: Help an expert get ready for an interview about potential project - e.g. update their resume (already uploaded)


Self-Serve [X] Expert Onboarding : Best practices working with [X] and project work - includes: logging time, engaging with a client, communicating with [X] engagement manager, chatting with other experts, sharing solutions, asking for help, project lifecycle

Slack Channels: Create different expert focused channels like:
introductions-experts
upskill-resources
project-help
best-practices
[X]-announcements

Channel Etiquette: Include this in each channel description. How do community members communicate, behave, and how to report? What are the rules?


Project


10K Client Projects


How to ensure  projects and experts assigned, like Sam, are supported and ensure the same quality of work?

Understanding the project lifecycle and providing support along the way helps experts focus on project execution.

What to Build

Project Lifecycle: Description and walkthrough of how typical  projects run, from handoff to project close out and debrief.

Expert Buddy: Buddy system for new  experts to receive a buddy to ask questions to.

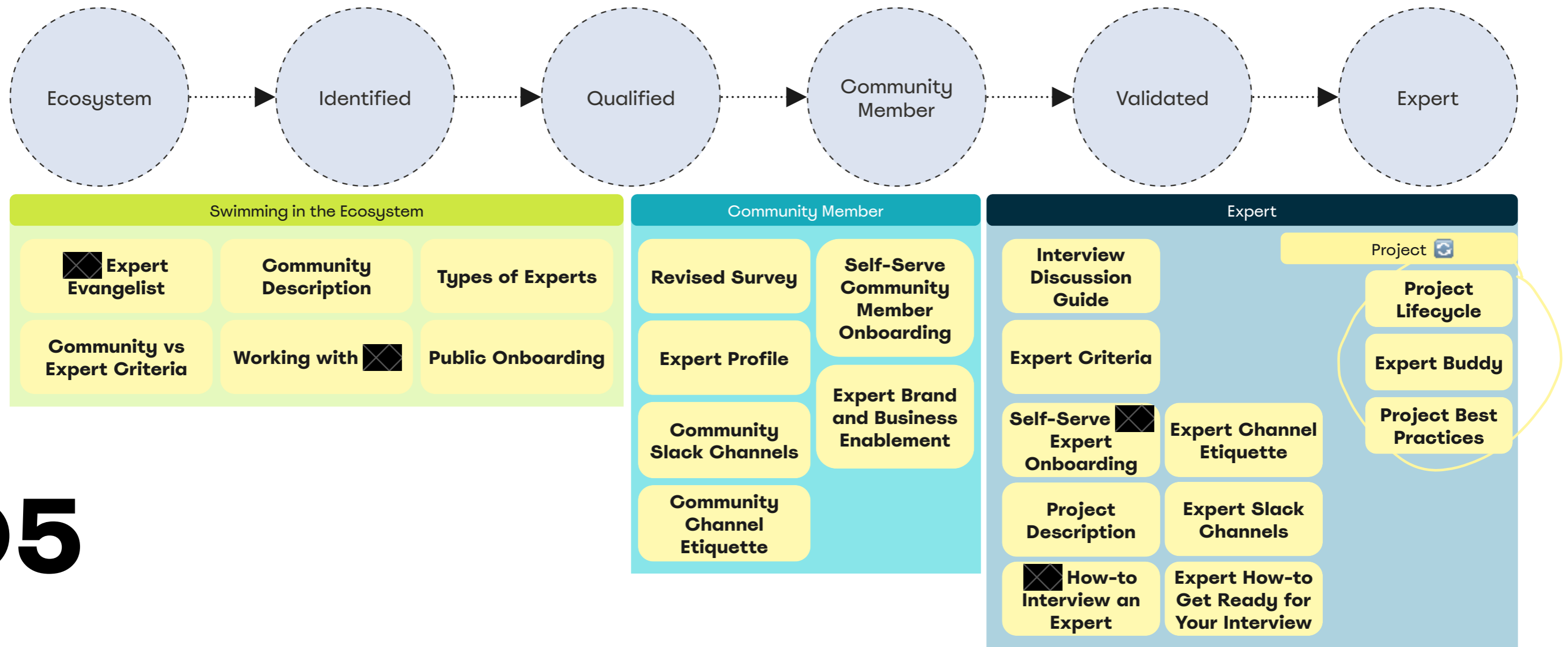
Project Best Practices: Collected best practices from  experts - includes: handoff, client communication, being a consultant, gathering/sharing lessons learned

Debriefs and Lessons Learned can be used to share in the expert "lounge"

Build Journey

What to Build?

We gather our recommended components and map them along Sam's ideal journey.



05

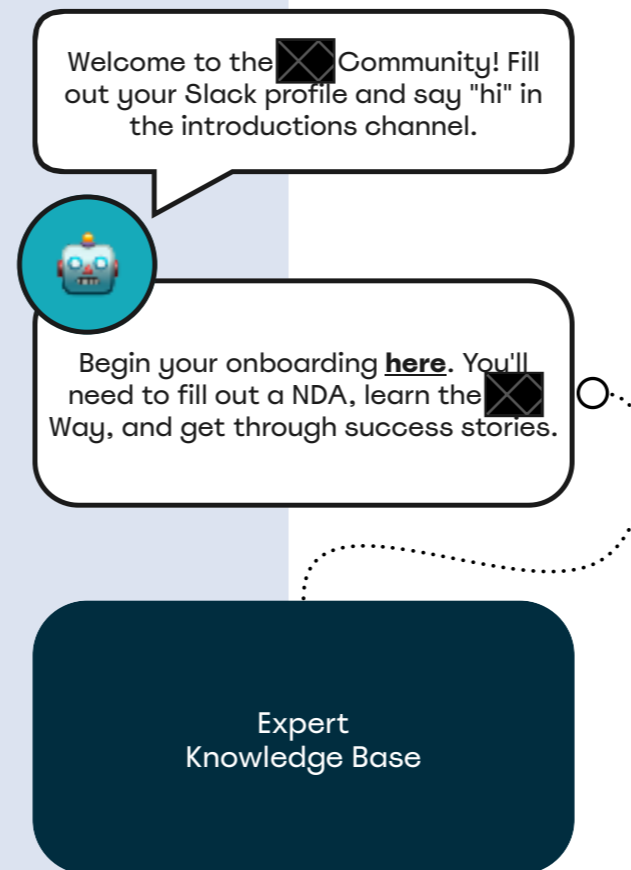


Recommendations

How to Build?

A recommended approach to building out this strategy for the Expert Community is to:

1. Build a **Knowledge Base** that can be stored, maintained internally and other platforms can pull from.
2. **Activate the Knowledge Base** by considering different interactions, transitions, and milestones of an expert's journey. For example, a Slack bot that triggers onboarding when a new community member joins OR scheduled content to kick-start conversations amongst the experts.



MVP Recommendation:
Try this approach with the **Self-Serve Community Member Onboarding** - large user pool for feedback.

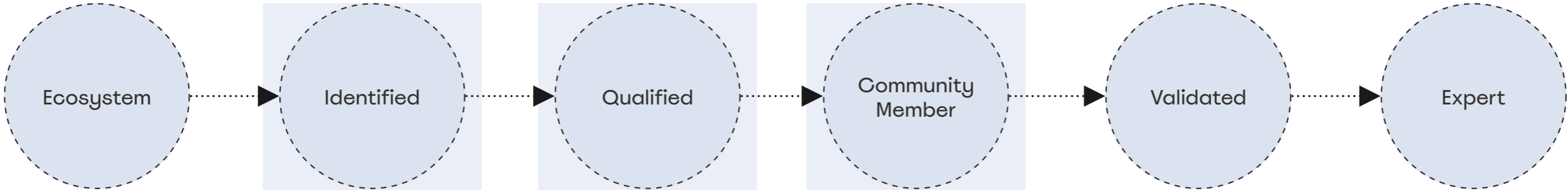
Why Slack?

Slack is an easy and flexible platform to build a way for experts to search, get reminded, or onboarded with the right information.

Resources

- [Slack Workflow Builder](#)
- [Create a Slack Bot](#)
- [Slackbot Custom Responses](#)

MVP Approach



Current Onboarding

MVP: Revised Onboarding

Expert Lounge Onboarding

Sample Content Pieces

Intro Content about : What is the community? How works? Why the platform exists to value your expertise?

Values & Ways of Working

Basic Project Process

Create your profile

Complete necessary forms to gain access to the community (e.g. NDA, W9)

Sample Supports

Website

Email Campaign

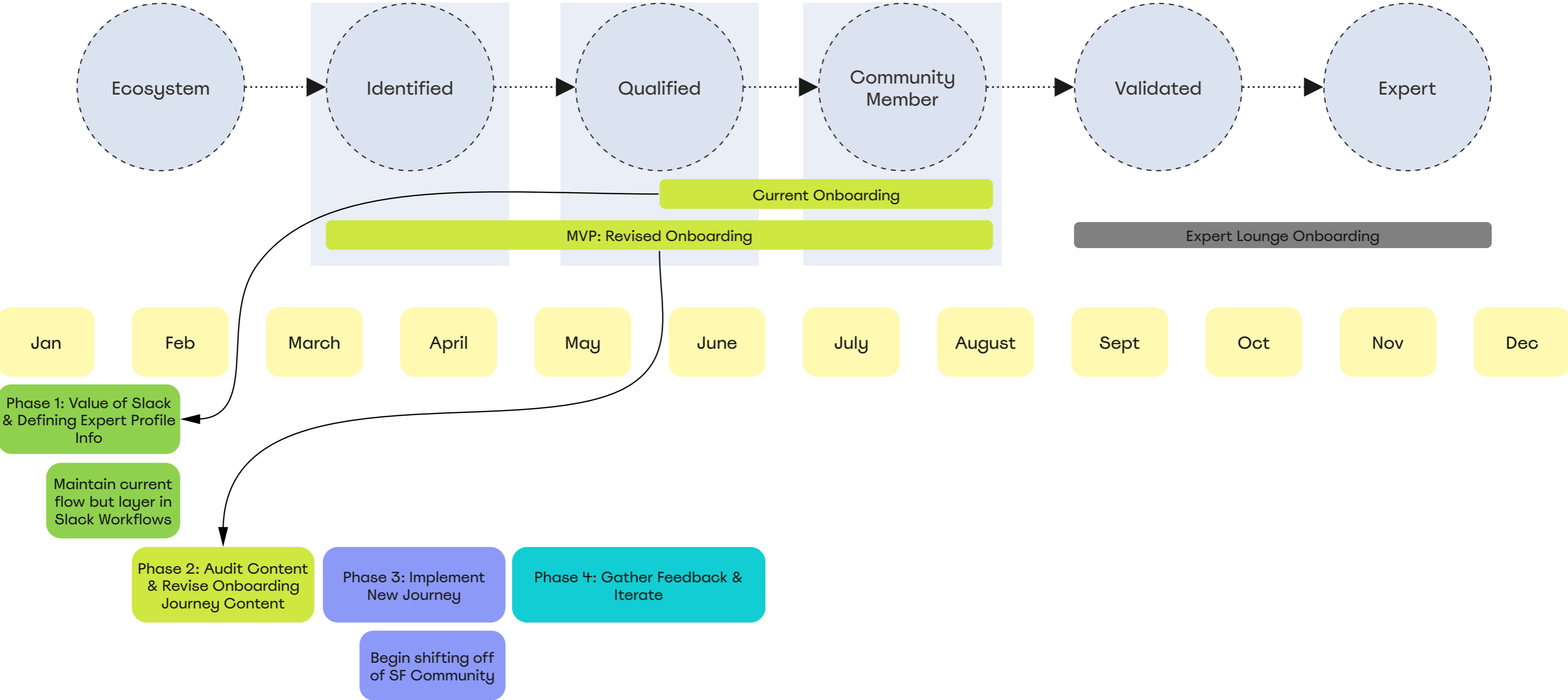
Slack Onboarding Workflow

Application Survey

10K Expert Criteria

Parking Lot for now but should build off of the MVP Community Onboarding

MVP Timeline

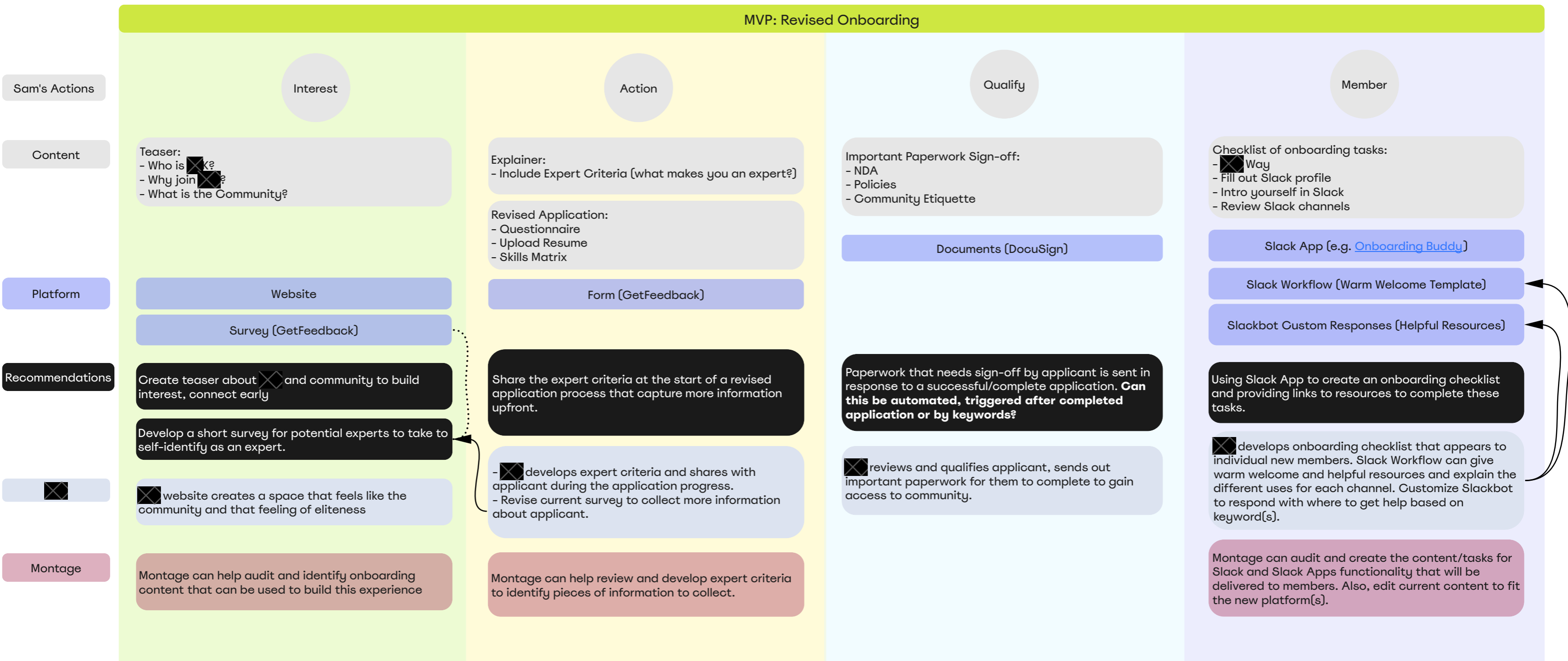


Components

Requires auditing of current onboarding content and survey material

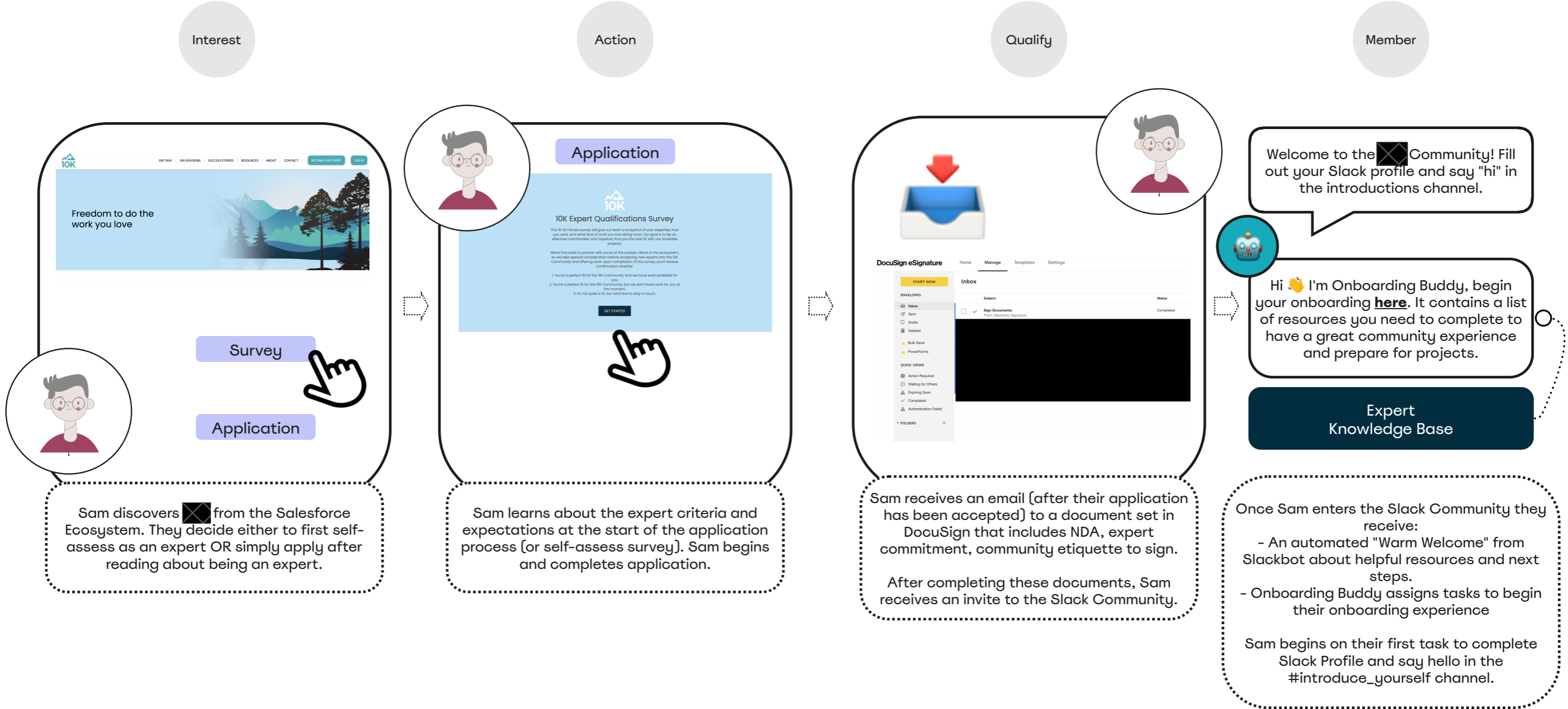
Sam (our Expert) has a highly sought skillset AND comes across many opportunities, BUT is not sure how, when, or what is needed to leverage these opportunities, THEREFORE 10K provides a platform where Sam can easily learn how.

MVP: Revised Onboarding



Example

MVP: Revised Onboarding

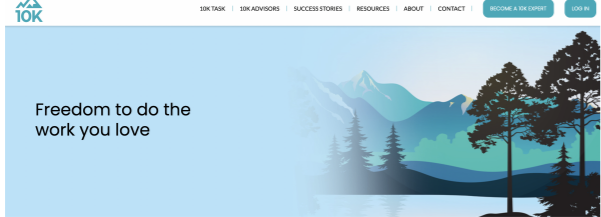


Interest

Action

Qualify

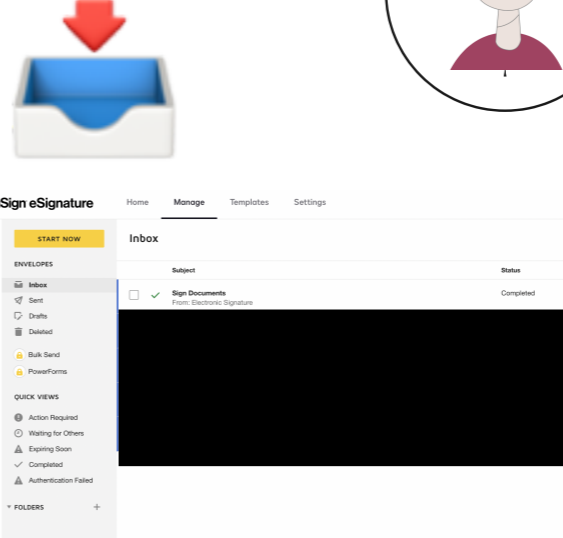
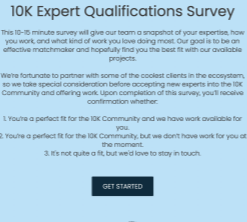
Member



Survey

Application

Application



Welcome to the 10K Community! Fill out your Slack profile and say "hi" in the introductions channel.

Hi 👋 I'm Onboarding Buddy, begin your onboarding **here**. It contains a list of resources you need to complete to have a great community experience and prepare for projects.

Expert Knowledge Base

Sam discovers 10K from the Salesforce Ecosystem. They decide either to first self-assess as an expert OR simply apply after reading about being an expert.

Sam learns about the expert criteria and expectations at the start of the application process (or self-assess survey). Sam begins and completes application.

Sam receives an email (after their application has been accepted) to a document set in DocuSign that includes NDA, expert commitment, community etiquette to sign. After completing these documents, Sam receives an invite to the Slack Community.

Once Sam enters the Slack Community they receive:

- An automated "Warm Welcome" from Slackbot about helpful resources and next steps.
- Onboarding Buddy assigns tasks to begin their onboarding experience

Sam begins on their first task to complete Slack Profile and say hello in the #introduce_yourself channel.

Next Steps

Montage has expertise in auditing, identifying, and curating content towards a strategic goal for users and learners.



1

Audit onboarding content, rebuild knowledge base/foundation

2

Revise current onboarding to integrate with current platforms (website, getfeedback) and decide where each "gateway" for content pieces are, what should be completed before in order to get the next piece of content - develop content journey



3

Identify how each piece of content is delivered to user (e.g. deliver via website, survey, email, Slack message, etc) along the journey



4

Review technical feasibility and review any needed tools/platforms

Internal or third-party expertise may be needed to assess

5

Revise content as needed for delivery type and journey moment



Montage can build and implement pieces of the journey. Sometimes there is a need for internal or third-party consultants to help with a more technical implementation.

6



Craft and test a prototype of the journey or piece of the journey

Internal or third-party expertise may be needed assist

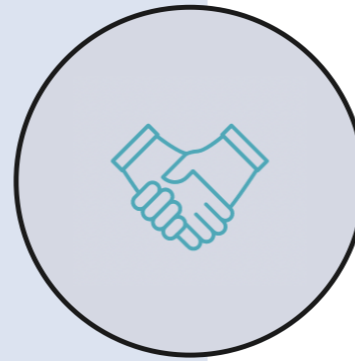


Wrap Up

Closing Thoughts

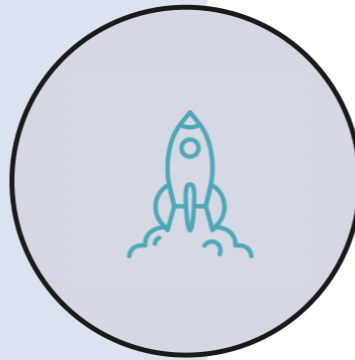
Our potential solution is designed to fulfill  business goals aligned to your values as well as creating the best journey possible for  Experts.

07



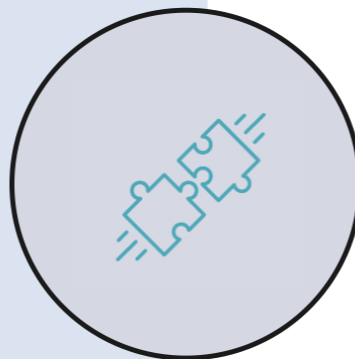
Earn Trust

Providing the right information at the right moment, at the different stages, for experts makes them feel supported and trusted.



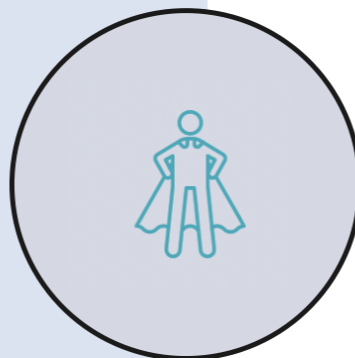
Be growth-minded

Giving experts the opportunity to interact sharing lessons learned, best practices, and just fun things builds a learning community.



Be a problem solver

Creating a community of independent experts provides a space where they can air obstacles, celebrate milestones with others along a similar journey.



Be a leader

Supports current and potential leaders through knowledge and even mentorship ensures a strong community.



2021

