Enterprise
Ignition Sequence
Guide

Bloomfire

Contents

The Ignition Sequence is Bloomfire's proven implementation methodology. This four-phased approach will take you from project start to go live, typically in 30-60 days — or even less. Bloomfire is easy to setup and maintain, but in order to maximize its potential, it is important to build the right foundation before launching. That's where the Ignition Sequence comes into play. We've also included a glossary of terms that will be helpful as you navigate through the Ignition Sequence.

Implementation Plan

Your Client Success Manager (CSM) will be your main point of contact during the Ignition Sequence and will guide you through a successful planning, configuring, seeding, and launching rollout. Your CSM will create a customized project plan based on your needs.

Remember, we are here with you if you need anything at all, just contact your CSM and they'll be able to assist you.

Bloomfire
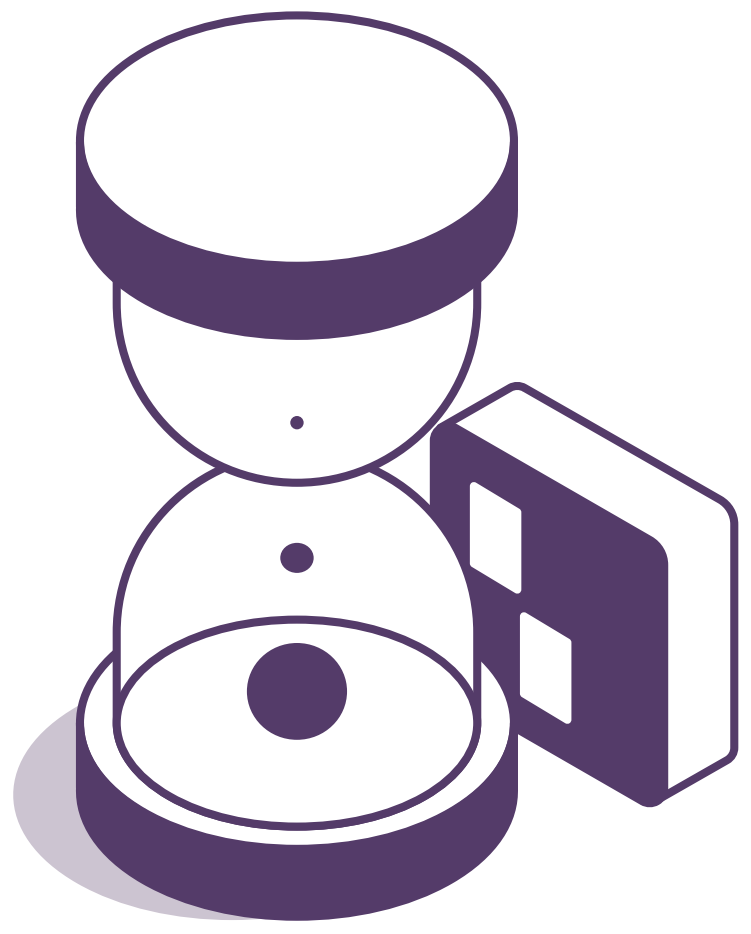
1. Plan

Kick off your project by establishing your goals, key players and their roles, metrics you will use to measure progress and mapping out your community and access group structure. Get training on how to use the platform to meet your goals.

2. Configure

Begin using the software and create your first community. Set up governance, operational settings and categorization. Customize branding, choose color schemes and set up your custom homepage.

3. Seed

Populate your community with content and make sure that the platform is working as expected, use beta testing to collect early feedback. Prepare teams for a successful launch.

4. Launch

Invite your users into the community and host a launch event. We will help you build and execute a change management plan.

The Bloomfire Community

The Bloomfire Community (http://community.bloomfire.com) contains tips, how-to's, tutorials, and FAQs with real solutions. It is also a great place to understand how other organizations are utilizing their communities for success. We will point you to specific contributions in the community several times throughout this document.

This document is best used in conjunction with the Bloomfire Community resources. In addition to all of the public contributions, we have set up a special section that is available only to Admins and Owners to utilize during their implementation. This section will not only highlight contributions that are especially important while you are implementing Bloomfire, but also allow us to work together to track your progress, make sure you stay on track, and ensure your ultimate success.

Guaranteeing Adoption Through Successful Change Management

Even if you have thoroughly thought out and structured your community, failing to focus on change management from the beginning will likely lead to low adoption. Your end goal is getting people to adopt Bloomfire in their day-to-day workflow by demonstrating how easy and valuable it is to use Bloomfire. This is why we have put together some change management best practices to reference as you launch your community. We have also compiled a list of great examples of what other customers have done to ensure successful user adoption:

- Driving Adoption During the Setup Process
- How to Have Fun with Bloomfire: Use Contests to Drive Adoption in Your Community
- Customer Success Story: Lionbridge Launches Its Community
- Customer Success Story: Master Social Learning Like Cannon Financial Institute
- Customer Success Story: Become an Employee Engagement Champion Like Elixiter
- Conagra Brands: Driving Engagement from Day 1 and Beyond

Creating a Successful Launch

Having a solid launch plan is vital to successful user adoption. Bloomfire will work with you to coordinate a launch plan that is right for your organization. From giving away prizes to working with event staff, your CSM has the experience to assist you in setting your team up for a successful launch. The launch itself serves as the crescendo to your work and allows your organization to learn and understand what your project can do for them.

Plan

During the planning phase, you and your team will take the time to identify key players and their roles during your Bloomfire rollout. It is important that you have an internal meeting with your main stakeholders, subject matter experts (SMEs), and your CSM to strategically identify who is responsible for what tasks and who needs to be involved during the different aspects of configuration.
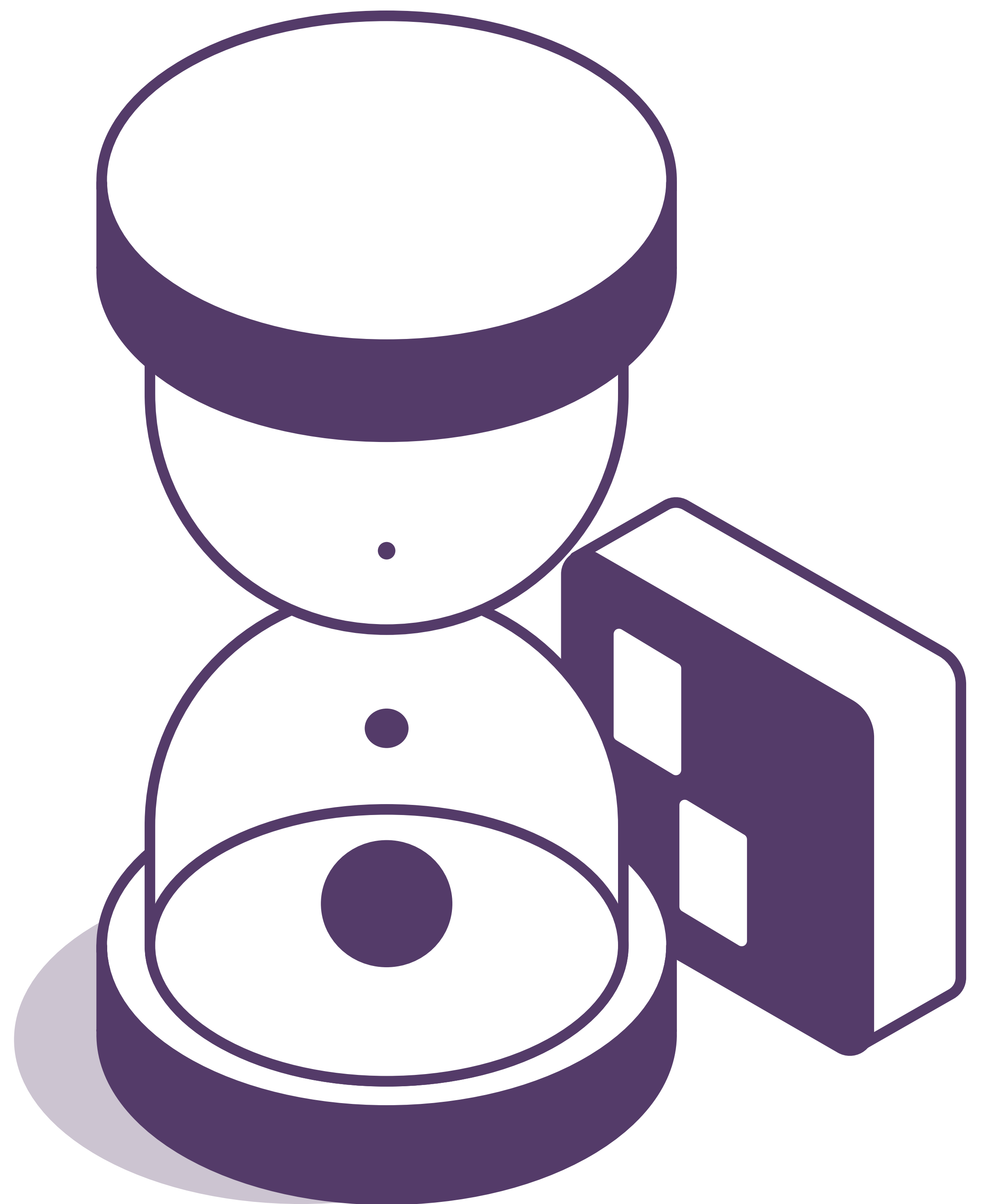
Bloomfire

Step 1: Establish Your Purpose

An important first step is to establish the purpose of your community. This includes what you hope to accomplish with Bloomfire, your goals, and how can you make the launch of your community a success. Meet with your CSM to discuss and document this step so you can refer back to it as you progress through the rest of the Ignition Sequence.

Step 2: Attend Ignition Sessions with Bloomfire

Bloomfire will contact you to set up your initial onboarding session. This is the official project kickoff. In this session, we will provide training on how to use the site, will discuss your Ignition Sequence in detail, and will give you time to ask questions.

Step 3: Identify Community Manager/Owner

Forming the right team is an important ingredient of a successful launch. We recommended assigning people to the following roles, note that many times one person may fill multiple roles: Project Manager, Community Champion, and Community Admin(s).

Step 4: Identify Steering Committee Members

The steering committee is a cross-functional group of people who will determine the overall structure of your Bloomfire community. The committee should include an executive sponsor, your SMEs, top content producers, and others best suited to determine overall community structure. This group will eventually seed the system with contributions to ensure they are findable.

Step 5: Identify Executive Sponsor

Your executive sponsor is typically a C-level executive. They will serve as the project advocate of your community. Executive sponsors will provide overall guidance on goals and benefits of the project. They will also play a role in announcing the platform and encouraging teams to use it when you launch.

Pro Tip:

For your initial onboarding session, it is best to include anyone who will have a part in the implementation process. Also, feel free to invite some of your SME's as they will help with the buy-in process.
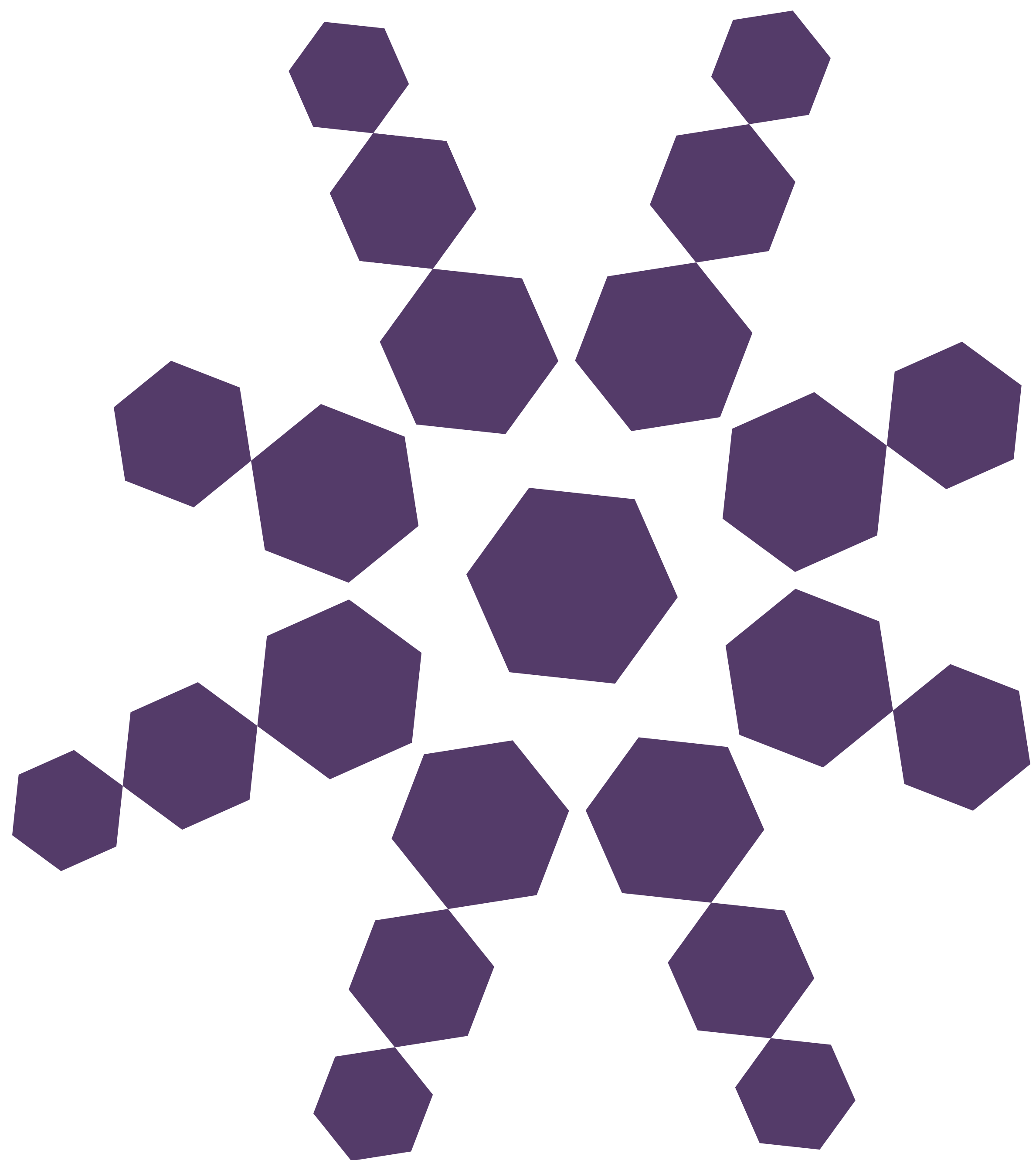
Bloomfire

Step 6: Identify Assets for Your Community

Contributions consist of the assets and files you want to share with your members. You can upload any file type into Bloomfire, including video. Create a spreadsheet to inventory the contributions you'd like to launch with, along with relevant categories and subcategories for each.

During this step, a best practice is to establish rules for what assets belong in your community. Questions to ask yourself include: Do we want work-in-progress files or just final files? Do you want fun/cultural posts or is this all business? Work with your CSM to make sure your posting guidelines match your community goals. We've also put together some best practices on How to Manage Content in Your Community.

Step 7: Establish Community Structure

Bloomfire provides methods to keep users, as well as contributions and assets, organized, searchable, and easily retrievable. This can be done through the use of categories, as well as group structure. Your CSM will be heavily involved and can help supply best practices for this stage. We've found that the simplest structure is often the best, so don't over-engineer your community structure to start with. You can always add and move content after you launch if needed.

Step 8: Define Governance

If you'd like to set up an approval step for new posts and questions, now is the time to establish the workflow for administering your community and its members. This is also a good step to assign roles for the remaining users of the organization: Owners, Admins, Authors, and Learners.

Step 9: Define Engagement Metrics for Your Community

Work with your CSM to identify specific metrics that align with your organizational goals and community purpose. We will revisit this step in the launch stage.

Step 10: Create Messaging for Your Steering Committee Invite

Create an email that introduces Bloomfire to your steering committee. This should explain the purpose and goals of your community as well as their role in the launch of the community. Remember to include information such as the time commitment you are asking from them.

Step 11: Create a Strategy and Plan for Your Community Launch

The launch of your new community is extremely important. A successful launch makes everyone aware of the platform, how to use it and can generate a lot of excitement. Work with your CSM to develop a launch plan that drives immediate engagement as well as excitement. A best practice is to include a contest as part of your launch to get your users using Bloomfire from day one.

Bloomfire has experience working with a variety of companies and can help you tailor your launch plans specifically to your organization and budget. Examples range from simple mailers/handouts to full events planned by professional event planners. We have handled launches of every size. Talk to your CSM to determine which type of launch would be best for you. We have a variety of Professional Services that can meet your needs.

Step 12: Create Pre- and Post- Launch Surveys for Community Members

A pre-launch survey establishes a baseline that suggests how much employees like or don't like your current solutions. A post-launch survey helps quantify the impact of the new solution. This can help you communicate an immediate ROI within a few months of implementation and also help identify areas for improvement.

Pro Tip:
The pre- and post-launch surveys are an excellent way to identify less concrete metrics, such as qualitative improvement of user experience.
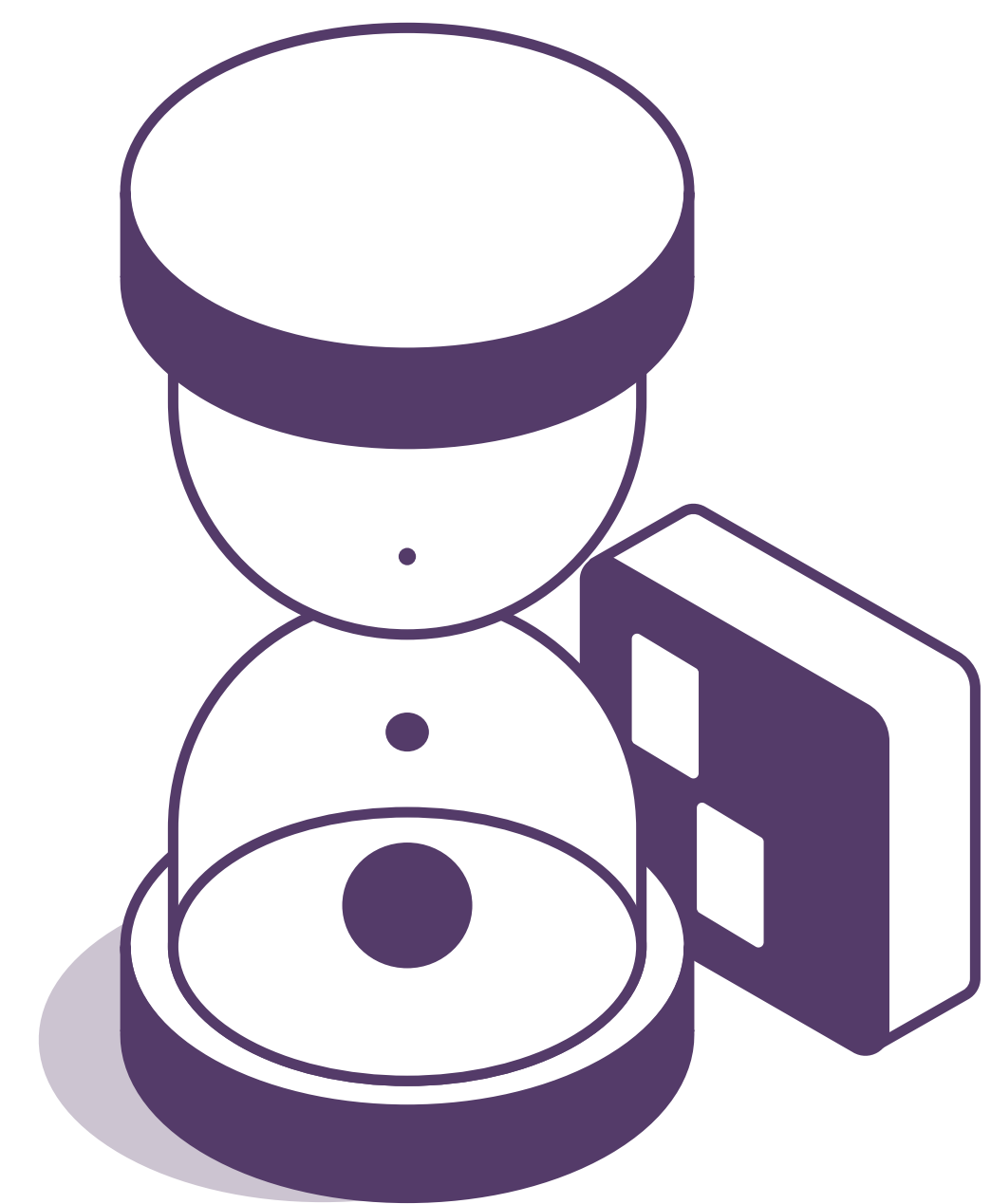
Checklist

◇ Attend Ignition session with your CSM
◇ Form the right team
◇ Create a project plan
◇ Define community structure and metrics
◇ Map out your community workflow
◇ Identify assets to be uploaded to the community
◇ Create a marketing plan for launch
◇ Create pre- and post-launch survey

Congrats, you've finished the planning stage of the Ignition Sequence and are ready to move on to the configure stage.

Change Management Tip:
Begin to share the excitement of the project. Start mentioning the project in departmental meetings. Now it's time to get the word out.

Configure

After becoming familiar with Bloomfire and planning out the implementation steps with your CSM, it is time for configuration, the second phase of the Ignition Sequence. During this phase, you will begin using the software and create your community according to the guidelines set in the planning stage.

Step 1: Setup Community Structure and Branding
This is where you'll work with your CSM to establish your community's your branding colors and logo and to set up your categories and groups.

Step 2: Configure Community Settings
During this step, you and your internal implementation team will configure the settings for your community. Community Settings include settings for the Promo Bar, contribution interaction, default notifications, and integration configuration.

Step 3: Assign Categories
Begin adding in the categories that you and your implementation team identified during the planning phase.

Pro Tip:

You can configure the Promo Bar to be hidden on smaller screens, such as phones.

Step 4: Promo Bar Design
The promo bar is a customizable area of HTML space in Bloomfire. While the promo bar can be used in a multitude of different ways, it is ultimately the hub for users to easily access the information they need, route to frequently visited sites and tools, and find contributions faster. Since your users will be utilizing your community as a centralized "hub," you should add links to tools that your team will utilize most often. You can also use the promo bar to create links to content organized in a certain way. To learn how you can get the most of our your promo bar, refer to this document. Your CSM will work with you and the Bloomfire designers to implement a promo bar that fits within your company's branding guidelines.

Step 5: Configure URL White Label
If purchased, you can create a custom subdomain for your community. This is called "white labeling" because it removes bloomfire.com from your URL. Your IT department will need to be involved in this process.

Step 6: Configure SSO
To configure Single Sign-On, you will need the support of your IT department. Its a very straightforward process and we can help walk them through it.

Step 7: Hold Steering Committee Meeting
Working together with your CSM, your steering committee meeting should incorporate background on how Bloomfire is being used, product training, goals for the community, and your launch plan. This is a good time to make sure everyone has early access and can log into the community.

Checklist

◇ Configure community structure
◇ Create promo bar
⬡ Steering committee participation
  (buy-in, messaging, and holding meeting)

Congrats, you've finished the configure stage of the Ignition Sequence and are ready to move on to the seeding stage.

Change Management Tip:
Create marketing assets to further the excitement of the project. Create teasers and handouts mentioning the launch date.

Seed

Now that you have completed the configuration of your community, it is time to begin the seed phase, the third phase of the Ignition Sequence. The seed phase is dedicated to seeding the community with assets and ensuring that the platform is organized for success.
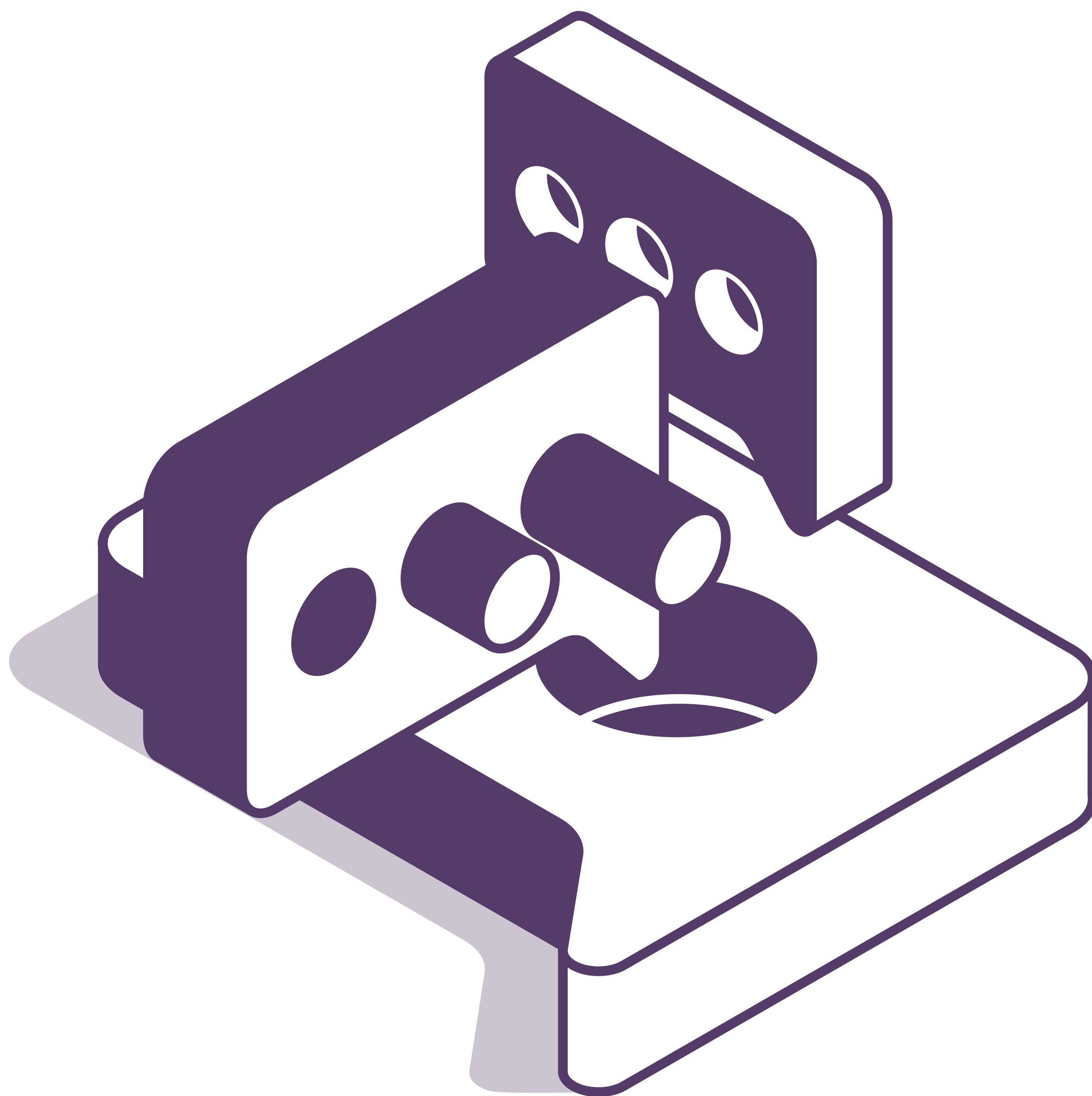
Step 1: Bulk Import Existing Assets to Your Community

Using the assets you identified in step 6 of planning, work together with your CSM to
import the assets into your community. Bloomfire can assist in the bulk import of questions if needed. This is also the time to organize the assets uploaded using the
category structure you established using
the bulk categorization tool.

Step 2: Seed Your Community with Questions

Add your beta testers as users and have them being creating additional contributions within
the community.

## Step 3: Gather Feedback on Community Layout and Structure

Ask your beta testers to provide feedback before launch. Ask questions such as "did you find what you were looking for?" "Were the categories of information intuitive and relevant to your role?"

Step 4: Send a Pre-Launch Survey to All End Users

Send the pre-launch survey you created in step 11 of the plan phase to your end users and gather results.

Step 5: Make Final Adjustments to Your Community Based on Beta User Feedback

Prepare the community for launch based on feedback from your beta testers. If there were major issues identified, talk to your CSM about ways to adjust your community structure to ensure a successful launch.
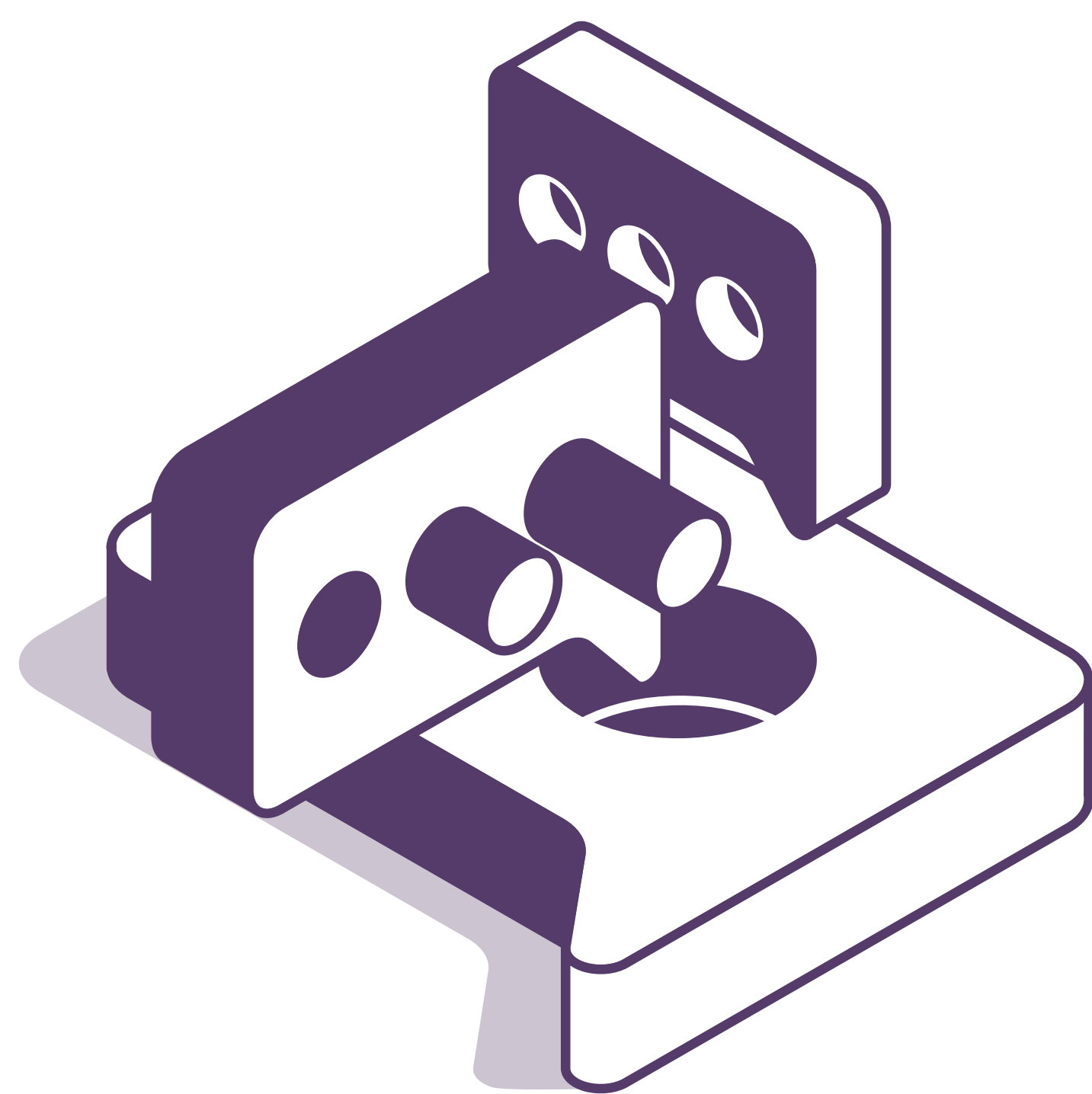
Checklist

◇ Seed community with contributions and assets
◇ Prepare community for launch
◇ Send pre-launch user survey

Now that you've completely set up your platform, you are ready to launch!

Change Management Tip:

Incorporating an email from the executive sponsor which highlights the goals and expectations of the project is a great way to support your change management plan.

Launch

Congrats! You're ready to launch your Bloom-fire community to the rest of your organization. At this time, you should feel confident about the configuration of your Bloomfire platform. A successful launch requires strategy, which you and your CSM will go over during this part of the Ignition Sequence. It is important to get everyone involved in the implementation plan on board with your launch strategy.

Step 1: Change Management

There are two aspects of successful change management you should consider with your launch: buy-in and continued use.

To get buy in from all your users, everyone must recognize the benefits and purpose of your community. At this point, it's critical to illustrate how much time users will save looking for information when they use the community. You should also make it clear to your SMEs that they should see a reduction in interruptions when people use Bloomfire for questions and answers. Suggest that if an expert receives a question, they direct the person who asked it to post it in the community. That way, the question and answer will be visible to all community members.

To ensure that users come back to the community, it's important that they have a positive experience. Make sure the community is the first place where people go to look for information and make sure they can get a response quickly. Encourage your knowledge experts to share what they know and monitor questions. In addition, you can utilize reports such as the search query report to make sure users are finding what they need. Talk to your CSM about this and other ways to monitor user behavior.

Step 2: Begin Tracking Engagement Metrics

Remember when you established your engagement metrics in the planning stage?
Well, now it's time to start monitoring those metrics using Bloomfire reports.

Step 3: Create Best Practice Contributions

Work with your CSM to create featured contributions for user navigation that are tailored to your community, such as, "How to Create Post," "How to Filter for Contributions," or "How to Search." Refer back to the permissions you established in the planning phase to identify which role a majority of your users will possess so you can tailor your post accordingly.

Pro Tip:

Suggest that if SMEs receive questions in person or via email, to redirect that question to the community, so they can provide answers and make both the question and answer visible to all.

Step 4: Add End Users as Members to the Community

Bloomfire will assist you in adding your new members in bulk. Adding users before your launch will allow you to configure the access/roles before your users begin accessing the community.

Step 5: Send Executive Sponsor Email

This email contains a welcome note as well as an explanation of the purpose of your community.
We recommend including a selfie video from your executive sponsor to help generate excitement for your new community.

Step 6: Schedule Regular Check-Ins with Your CSM

Bloomfire will schedule ongoing meetings with your team to continue sharing best practices and to help track your goal progress.

Step 7: Launch Event

It's the day you have been planning for; it's time to execute your launch strategy. To get users active in your community, you can hold a community-wide scavenger hunt, engagement contest, etc. to show users how easy it is to access and navigate. Make sure your executive sponsor is present and that your seed group is on-call to help with questions. Our customer Conagra went with a scavenger hunt for their launch. Click here to hear their story.

All the preparation and hard work will pay off.
We recommend holding at least two training session throughout the day so that you can guarantee everyone will have an opportunity to attend. Stick to your launch event schedule and work with your Bloomfire team to make sure your day a huge success.

Step 8: Send a Post Launch Survey to Users

Send out your post-launch survey 2-4 weeks after members have been given access to your community.

Checklist

◇ Add new members to your community
◇ Create an instructional featured post
◇ Start monitoring goals for community engagement
◇ Send welcome email to all users
◇ Hold your launch event
◇ Send post-launch survey

Change Management Tip:

As part of your launch, ask your executive sponsor to post a welcome message in your community and make it a featured contribution.

❋ Bloomfire

After Launch

Congratulations! You've successfully set up your Bloomfire community. If you have any questions, either refer back to this document, contact support, or interact with other Bloomfire customers in our community - **community.bloomfire.com**

Can't find something? Contact your CSM.

When you can't find the answers you are looking for in the community, reach out to your CSM orAccount Executive. You can also email your questions to: **support@bloomfire.com**

Bloomfire

Glossary

Advanced Reporting: Advanced Reporting allows Owners and Admins to dig deeper into certain metrics, data, and information on user activity.

Analytics: A visual representation of your engagement and user activity.

Author: A role that can create contributions within the community.

Beta Tester: Any user, regardless of assigned role, who is part of the soft-launch of your community.

Categories: A way to organize contributions. These will be the main topics of your community. We recommend you limit to around 10 - 15 categories to start, but this may vary based on community.

Community: The main repository that is comprised of groups, categories, contributions, and users. Get your crash course by referring to Managing a Community 101.

Community Admin: The person(s) responsible for administering your community. They can add new members, moderate posts, manage contributions, curate contributions and categories, and view reports across communities.

Community Champion: The community champion refers to the person(s) that will become Bloomfire's main point of contact after the implementation of Bloomfire.

Community Engagement: Community engagement refers to a personalized metric that organizations define based on views, user activity, content creation, metadata, etc.

Community Settings: Where Owners can set the community level preferences for privacy, registration, moderation, integrations, and more. Explore the settings page by going to the gear icon in the upper right of your community.

Community Structure: The community structure refers to the way that the community is organized in regards to groups, categories, and subcategories. Defining and configuring the community structure is an important component of implementation and you should always get feedback from the team to maintain engagement. Those with the Owner or Admin role can configure the community structure.

Contributions: Any type of content that is created by an author: question, post, and series.

Executive Sponsor: The executive sponsor refers to the C-level Executives who will help you promote Bloomfire to the rest of the community. Although they are not typically involved in the Ignition phases, they are necessary when it comes to sending out messaging and gaining additional buy-in for the purpose of Bloomfire.

Featured Contributions: The real estate at the top of community that can be used to promote important posts. Community Admins and Group Managers can edit featured contributions to grab users attention.

Filters/Facets: The set of categories and contribution types that allows users to browse through contributions within the community. This is where categories truly find their value with user experience.

Governance: The workflow and roles of your community. Governance addresses who will be administering the community, is creating contributions, and is responsible for moderating the community.

Groups: A set of users. Groups are a subset of communities that can be used to separate users and contributions from the main community. When creating groups, refer to this documentation.

Group Admin/Manager: A role with Admin functionality limited to a specific group.

Learner: A role that can view, interact, and ask questions within the community and group(s) that the user is a part of. They cannot create posts or series.

Notifications: Bloomfire provides in-app and email notifications for users that opt-in to being notified of certain events that occur in the community or groups they are a part of. To see the notifications you subscribe to visit your Account Settings underneath the Profile Menu.

Owner: The Owner role has the highest permission levels inside the community. Anyone who needs to modify configuration of the organizational structure and appearance will need to have an Owner role.

Post: A contribution that can incorporate different types of media and visual documentation to provide knowledge to others.

Profile Menu: The place where a user can change their profile information, picture, password, skills, etc. The profile menu is also the place where users can navigate between communities that they are licensed to, curate their notification settings, and log out of the community.

Project Manager: The project manager refers to the person who is responsible for the implementation of Bloomfire for the organization from initiation to launch. Note: The community champion and the project manager are sometimes the same person.

Promo Bar: The Promo Bar is a customizable feature that appears at the top of the homepage. It can include text, images, and custom HTML. One example of the use of the Promo Bar can be found on the main page of the [Bloomfire Community](#). The community uses the promo bar as a secondary navigation tool that links to support, blog entries, groups, communities, and resources. The promo bar is an excellent feature that increases the usability and navigation of Bloomfire, especially with new users. It allows users to navigate within the community, as well as to external sites or tools. Please [click here](#) and here to see examples and best practices.

Question: A contribution that asks a question and requires an answer. All users can ask questions in the community.

Roles: Bloomfire has four main roles; Owner, Admin, Author, and Learner. To review all roles offered inside Bloomfire, please refer to this [article](#). Your CSM will help determine the proper roles for the different stakeholders. Roles can be edited in bulk in member management under the gear icon.

SAML 2.0: Security Assertion Markup Language (SAML) 2.0 creates a two-way agreement between two vendors asserting that the information provided is valid. It provides a standard framework to share this information, so you do not have to recreate the configuration for every vendor you want to share information with. This Single Sign-On (SSO) login standard has significant advantages over logging in using a username/password: no need to type in credentials, no need to remember and renew passwords, and no weak passwords.

Search Bar: The global search bar, located at the top of the community, is the best way to search for knowledge that you're looking for inside your community. Bloomfire's core product is its searchability which uses text rank to search through contributions, files, video transcriptions, and any documents to populate the most relevant knowledge.

Series: A contribution that is comprised of existing posts and questions that relate in topic and can be used to take users through a series of knowledge or information.

SSO (Single Sign-On): SSO is a security mechanism that allows users to sign in to multiple different platforms with one login. It also allows you to easily add users to the community through one centralized place. We support SAML 2.0 SSO Configuration.

Steering Committee: The steering committee refers to the group of individuals who will be testing the environment before it is rolled out to the rest of your organization. This typically consists of stakeholders from each group who will be active in the community. It is ideal to have a few of your SME's or top contributions producers involved in this process.

Sub-categories: A category that can be nested under a main category.

Tags: A crowd-sourced keyword(s) that can be added to a contribution to increase its searchability inside the community.

White Label: White labeling Bloomfire allows your organization to remove Bloomfire branding and entirely rebrand the platform to give it an identity that suits your corporate brand. Many customers will give it a unique name such as The Source, Iris, or Strut. This identity makes it easier to rally awareness around the initiative.

Bloomfire is the leader in knowledge engagement, delivering an experience that connects teams and individuals with the information they need to do their jobs. Our cloud-based knowledge engagement platform gives people one centralized, searchable place to engage with shared knowledge and grow their organization's collective intelligence.
For more information or to schedule a demo, visit www.bloomfire.com.

※ Bloomfire