Community Engagement Checklist

Quick reference to help you build a more active, connected, and engaging community in Simplero.

Start simple: You do not need to implement everything at once. Even adding 1–2 consistent engagement habits can make a huge difference over time.

Before You Start

- ☐ Decide what kind of community experience you want to create
  Examples: support-focused, accountability-based, networking, coaching, peer learning, etc.
- ☐ Think about what would make members want to return regularly
- ☐ Decide how involved you want to be personally in the community
- ☐ Review your current community setup and identify any missing basics

Set the Foundation for Connection

Set Up Your Forum

Site → Forum

- ☐ Enable and actively use the Forum as the main community hub
- ☐ Create clear categories so members know where to post

  Examples:
  Introductions
  Wins
  Questions
  Accountability
  Tech Help
  Feedback Requests

Site → Forum → Forum Settings → Categories

- [ ] Pin important or recurring posts to the top of categories if needed

Create a Strong Welcome Experience

Site → Forum Posts

- [ ] Create a welcome post that explains:
    - [ ] What members should do first
    - [ ] How to participate
    - [ ] Where to introduce themselves
    - [ ] What kind of engagement is encouraged
- [ ] Pin the welcome post to the top of the forum
- [ ] Decide how you want members to introduce themselves:
    - [ ] Individual welcome posts for smaller/high-touch communities
    - [ ] Batch welcome posts for larger communities

Enable Community Features

Site → Configure → Community Features / Advanced Settings

- [ ] Turn on the Members Directory if appropriate
- [ ] Enable member profiles and optional member-to-member chat
- [ ] Remind members to review profile settings such as:
  Bio
  Website/company links
  Social links
  Profile visibility settings

  These will show up when someone clicks on their name in the directory.

Build Consistent Engagement Rituals

Create Recurring Community Posts

Site → Forum Posts

- ☐ Schedule weekly prompts or accountability threads
  Examples:
  “What’s your goal this week?”
  “What win are you celebrating?”
  “What are you working on today?”
- ☐ Schedule reminder posts before live calls or events
  Example:
  “Here’s our call line-up for this week!”
- ☐ Pin recurring engagement threads if helpful

Forum Post → Pin Post

Send Community Emails

Marketing → Broadcasts

- ☐ Send regular digest or recap emails to:
  Highlight conversations
  Celebrate wins
  Share updates or new features
  Remind members the community is active

Gamify & Reward Participation

Enable Engagement Features

Site → Three Dots → Engagement Badges

- ☐ Turn on engagement badges
- ☐ Create badges for milestones such as:
  First Post
  Top Contributor
  Consistent Participant

Use the Leaderboard

Site → Layout & Navigation
Site → Configure

- [ ] Enable the leaderboard if you want light community competition
- [ ] Review engagement point settings
- [ ] Ensure the Members Directory is enabled for leaderboard functionality

Celebrate Active Members

- [ ] Regularly recognize contributors through:
  Community shoutouts
  Email spotlights
  Bonus resources
  Discounts or small gifts
  Member features

Re-Engage Quiet Members

Set Up Inactivity Follow-Ups

Site → Configure → Triggers

- [ ] Create inactivity triggers for members who stop engaging using the "Member Absent" trigger to send an email or automation, etc
- [ ] Example timing:
  30 days inactive
  60 days inactive
  90 days inactive
- [ ] Use warm, human check-in emails instead of sales-focused messaging

Monitor Member Activity

Site → Members → Filter Last Login

- [ ] Periodically review inactive members
- [ ] Reach out personally when appropriate

Encourage Member-to-Member Connection

- ☐ Encourage members to tag and support each other in posts
- ☐ Celebrate member wins publicly
- ☐ Create opportunities for peer conversations and collaboration
- ☐ Feature member spotlights regularly

  Ideas include:

  Wins
  Stories
  Progress
  Businesses
  Helpful contributions

Most Important Reminder

- Focus on consistency over perfection
- Small, repeatable engagement habits work better than occasional big efforts
- Ask your members what would help them feel more supported and connected (**bonus tip:** you could send them a Survey via Contacts → Surveys)
- Communities grow strongest when members feel welcomed, seen, and valued.

You got this! ❤️