

A QUICK START GUIDE ON

PLANNING

CREATING

RUNNING

A COMMUNITY USER GROUP

[HTTPS://GITHUB.COM/CRM-CAT/UGINABOX](https://github.com/crm-cat/uginabox)

Welcome!

This document outlines ways to create, plan and run a community user group. It was written with a technology focus in mind, but that is not to say you can not use this guide to create any type of user group, e.g. soft skills. The document walks through some important topics to consider when creating a user group, tips on planning and some suggested timelines to get them started and make things happen. This document is just a guide, and you may in your journey, find better ways to do things or approach, and you should always do what is best for your group.

What is a User Group?

A user group is a group of individuals with a collective purpose. Most user groups have that collective purpose of learning a certain technology or group of technologies. In cases where technology isn't the topic, it could be any topic you can think of where those people have a shared interest. A user group typically meets several times a year, which can be in person or virtually. There can be many variations of user groups, such as those who have lunchtime sessions, full-day events, and even multiple track events. There is no 'wrong' way a user group can operate, aside from perhaps never meeting or communicating with one another and so they have a broad scope of how they are created and run.

Why would you even want to create a User Group?

There are several reasons why you would want to create a user group. The most common is one simply does not exist in your current area, or the existing ones perhaps don't fulfil a need you and others may have (for example, doesn't meet often enough). The choice is a privilege, and just because a user group may already exist doesn't stop a new one being created, as it gives people more choice to attend and creates a more vibrant community. Other reasons to create a user group could be you want a specific technology focus or even just topic focus, certain time frames or times of the day.

Creating a User Group Strategy

AIMS AND OBJECTIVES OF THE USER GROUP

Awesome, you have chosen to create a User Group. It is beneficial to put together a strategy. This document addresses areas to consider when setting up a new User Group.

One of the first things to think about is your aims and objectives going forward. It helps to think about the 'WHY' when it comes to this - why have you chosen to start a user group?

Common 'Whys' when it comes to creating a user group are:

1. Bring people together with a shared interest
2. Learn collectively about topic areas
3. Grow talent in the region and provide leadership in technology

Once you have understood, you're why - go ahead and write this down on the next page.

Your 'why' becomes the aim of your user group. This is the driving force behind the growth of the community that can become an integral part of your group. Your reasons for creating the group don't have to be singular and you may, especially if you and another person are working together, have different aims you want to achieve in the creation. This is the awesome thing about a User Group community that everyone will have their own 'why' and this collection becomes the User Group - often seeding 2-3 different 'whys' based on the number of people leading its growth.

Your aim is your long term goal and as stated is the driving force behind decision making and objectives. Your objectives form the shorter-term goals of your user group, and common objectives are covered in this document. However, you may want to make your own too. The combination of your why, aims and objectives make up your driving force behind your user group, and when you have decisions or challenges in the group (which are inevitable), you should come back to these statements to help you in those times.



Why do you want to create this User Group?

[illegible]

Breaking down strategy into actions

Now you have understood your 'Why' - your main aim and have broken this down into objectives. It helps to then now break those into specific actions.

This section reviews some common questions and planning methods you can ask yourself as the founder of a user group, and it's leader, to have a greater chance at success.

Choosing a Platform

SOFTWARE AND TOOLS

To be able to run a User Group, you're going to need tools. These tools can range from anything to Microsoft Word and Excel to complete business application tools and marketing programs. This is entirely up to you what tools you choose based on what you are willing to spend either personally or what budget is available to you.

It is essential to be mindful that the tools are not just about you - it is also your current and future committee as well that should be able to use and plan in most cases on the same tools.

Think about tools to:

1. To run your event
2. To market your event (see next page)
3. To collect data about your event (e.g. Microsoft Excel)
4. To collaborate with your committee (see next page)
5. To publish calls for speakers (Sessionzie, Microsoft Forms)

Planning Event Space

Event space is essential and when creating in-person events, are usually the first thing you look at when booking your next date. You cannot book your date until you have confirmed venue availability.

Some groups, depending on the size and popularity of the event space even look at booking 1-2 events in the future where possible to secure your next event

IN PERSON EVENT SPACE

In-person event space needs to take into consideration the number of tracks you're having in your event (tracks are where sessions are running at the same time) as this will show you the number of rooms you need to book. It also needs to take into consideration accessibility such as wheelchairs and can the projector be seen by everybody in the room.

VIRTUAL EVENT SPACE

Virtual event space is slightly different than in person as there are less cost and planning associated with booking dates and rooms. Virtual event spaces are often hosted in Microsoft Teams or Zoom and can be managed using the software.

FOOD

Food is essential when it comes to an in-person event due. Catering can be provided by some event venues where selections can be made - be mindful of different diets and requirements surrounding food and always ensure where these can be met, it is communicated on your public event page.

When booking food, try and think of those who you are aiming to attend the event, and even ask some of your target audience. Sometimes it is hard to meet everybody's needs on a budget, but with some thought a wide range of needs can be at the very least, considered.

Sponsors

WHAT ARE SPONSORS AND HOW CAN THEY HELP?

Sponsors are sometimes needed to run an event, although not essential. Sponsors are sometimes needed if there are costs involved by the venue, catering and other facilities. Sponsor packages are created to showcase what the event is about, and a cost is proposed in trade for normally - some level of marketing before or during the event.

Not all events need sponsors, especially if the event is virtual or you are booking a free venue, such as the Microsoft Reactor.

Some sponsorships can be managed without money, and an agreement is made where

The level of sponsorship depends on the scale of the event. The larger the event and the more commitment you need from the sponsor, the more money you will need to be prepared to deal with. Be prepared to always be transparent in your money handling as an event organiser and try and keep this public where possible (Meetup.com allow this for example). However, there may be needs to have a company and an accountant to manage this for you - it is never recommended to manage money in a user group. When managing sponsorships, terms and conditions need to be drafted and invoicing needs to take place - there have been instances where sponsors have not paid for their dues, and this needs to be taken into consideration when planning to use sponsors.



Marketing your User Group

GETTING THE WORD OUT

It is vital that with planning the date for your event, you have plenty of time to market your user group. This means getting the word out so people can attend. People are very busy, they have day jobs (and night jobs), and they also have their own commitments and projects. By planning early and then taking at least four weeks to market your event across multiple channels available to you, your giving people time to be able to see, notice, move some commitments around if they clash, and plan to attend.

IN HOUSE PLATFORM TOOLS

Depending on how you start your user group, there may be in house platform tools to utilise that can help you market the group. For example, Meetup Pro (a paid addition to the free platform) can notify and email all the members of a group. This can be a great way to tell people of an upcoming event and to get them to register or bring a friend.

SOCIAL MEDIA

It is a good idea to take some time to research your target audience. This is, so you know where they are hanging out online. This is an essential marketing technique and places such as Facebook, Twitter, and LinkedIn depending on your audience and target market are popular places. When you know what platform to use, start to use it to get the word out about your new User Group and why people would want to attend.

It is essential to keep it short depending on the platform your using (for example, Twitter) and aim to add value. Share what the User Group can do for them, why it would help by attending and what they can take away from it.

ASKING PEOPLE & WORD OF MOUTH

Utilising your own network is a great technique. Chances are if you are creating a user group for a specific technology, you will have your own network in that technology or area. Use that network and reach out for feedback, support and even attendance. Ask them to share your updates and social media posts.

Word of mouth is still so popular even today. We all still talk about what great things are happening and when somebody has an issue, if people are aware of your user group, they may just recommend it to people they are talking to at the time. This further shows the importance of awareness through multiple different channels and taking the time to market and get your user group known.

MY PLATFORM

WAYS I CAN GET THE USER GROUP KNOWN!

Why consistency is critical

Creating a user group is a lot of work, and there is a massive reward from doing so. You achieve your aims. Your aim would not be (and should not be) 'create one event'. A singular event is not a user group, and so by planning for success, you are setting yourself up for a more tremendous opportunity of meeting your goals. Those goals are creating a long term community, made up of multiple events.

Consistency in creating regular events is one of the cornerstones of creating a user group.

Consistency means being committed to the user group for the long term and not just setting up a single event. A user group is a community where there is continuous feedback, and you are creating consistency through the attendees too. They will become part of that community and would not be possible if events were not put on regularly.

WHAT TO DO WHEN YOU GET NO ONE SHOW UP

We are all afraid of one thing when leading a user group. That it will be just you.

You know what?

That is okay. Having not a single person show up is not a terrible thing. Make the most of it - you will have your committee there with you, so proceed as planned and finish the event, and take pictures of the great sessions you had with the people who showed up - you.

A user group is not a collection of a certain number of individuals, it is merely a collection of individuals who share a common interest. When you post those pictures online and show this happened, the group is real, and it looked engaging, it creates a need and a possibility for other people to want the same for themselves in the future - leading to more and more people showing up.

Collect like minded people

FORM A COMMITTEE... BECAUSE IT CAN'T JUST BE ONE PERSON

As much as you want to drive the creation of a user group - you cannot and should not do this alone. Having a small group of like-minded people to help can bring a diversity of thought to the group allowing you to get a consensus of your target market at the very outset.

Do some research and think about who would want to help you - approach them with your goal and what you wish to achieve - your 'why' statement. Talk to them about if it's something that interests them and what they would want to achieve too. A user group could be the same vehicle to achieve their own 'why' statement.

Use the space below to write down some names of who you already know that you can approach and share your vision. Then do it!

SOME PEOPLE WHO CAN HELP ME:

Data to collect before & after

You are going to all this effort to run a user group; it is worth the effort to take a special look at some data which could help you gather feedback and help you iterate on your events to make them even more successful.

NUMBER OF ATTENDEES

By making a note of the overall attendees (for both in-person and virtual events) allows you to see the net growth per number as you grow your user group. Numbers are not everything, but it is an excellent way to know if you are reaching the target market you have set out to and if you are growing at a rate sufficient to your objective.

SPEAKERS

By keeping track of your speakers, even in Microsoft Excel, it allows you to be able to reach out to them when you want to invite them back in the future personally. Not only that, but it helps you build an event management network that you can reach into when you're creating other events and if you want to ask for feedback.

SPEAKER RATINGS

When you ask for feedback from attendees, you can log the feedback per session. This feedback is SO valuable for speakers who commit their free time to your user group to share with them how their session did. This includes how many attendees they had and their rating. There are different rating systems you can use, from simple to complex. You can simply ask for an out of 5 ratings and provide an area for comments, or you can go all out and design CSAT questions.

REQUESTS FOR CONTENT

When you publish a call for speakers, it is useful to collect the submissions from that call. Not all submissions will be able to be used, but the rest of those submissions can be coached and improved for later dates, or simply put on the backlog. Being transparent about this is useful and share with people that you are still very much interested in their submission. However, you can't use all of them though you're still interested in using it for the future.

3 Month Plan

YOUR START UP PLAN

MONTH 1

This plan is designed to prompt you to complete tasks in a time period. Month 1, for example, suggest tasks which should be completed in the first month of choosing to commit to creating a user group. Use this document to enter your ideas and notes in each respective area.

AIMS & OBJECTIVES	
WHY STATEMENT	
PLATFORMS IDENTIFIED	
CO- CREATORS IDENTIFIED	
LOCATIONS PLANNED AND IN PROGRESS	

MONTH 2

This second month is critical. You have completed a great deal of planning; now, it is time to commit. Commit to your dates, think about your future dates and start collecting your co-creators.

FIRST EVENT DATE	
SECOND & THIRD DATE CONFIRMED	
CALL FOR SPEAKERS	
MARKETING	
LOCATION IS CONFIRMED	

MONTH 3

In the third month, it is about completing your first user group, having identified your co-creators and created a marketing plan to start gathering followers for your user group.

MANAGING SPEAKER BOOKINGS	
MARKETING PLAN	
FEEDBACK/ RESEARCH FROM USERS	
COMMITTEE	
RESEARCH	