

Here is a detailed timeline and cast of characters based on the provided sources:

PM Mentality Community Engagement Timeline This timeline outlines the key phases and activities related to the PM Mentality community, focusing on onboarding, engagement, and metrics, based on the provided sources.

Phase 1: Onboarding & Initial Engagement (Day 0 - Week 1+)

Day 0-1: New member receives Slack and Coda invites (automated). New member is added to the Trello tracker. Mentor matching is prepared. New member receives a welcome email containing an intro post guide, checklist, and Slack guide. An Auto-Welcome Bot tags the new member in Slack. A checklist link is provided in the welcome email and pinned in a Slack DM. Goal: Attain 100% Slack + Coda access within 24 hours of invite.

Day 1: Welcome Message DM is sent. **Day 1-2:** A reminder ping is sent at 48 hours if the onboarding checklist is untouched. New members are prompted to post their intro using the "3-Layer Cake" framework or "Icebreaker Roulette." The "Identity Card Challenge" (using Canva templates) is an optional gamified intro method. New members are encouraged in light engagement activities (reacting, polls, event RSVPs). New members are listed in the "Who's New" Coda table and Slack thread. New members are given a small mission, such as commenting or posting in #random or #your-journey. **Day 2:** A DM check-in message ("How's your PM Mentality experience so far?") is sent. DM: "Hey [Name]! What brings you to PM Mentality?" is sent. **Day 3:** Starter content is highlighted, and new members are invited to the intro thread. Mentor Spotlight Moment: Mentors are encouraged to post a public praise of their mentee after 72 hours. DM: "How's your PM Mentality experience so far?" is sent. Within 72 Hours of Joining: Goal: Ensure 90% onboarding checklist completion. Coda View 2 flags members who joined > 72 hours ago and have < 90% checklist completion with a red background. **Day 5:** A public nudge (if appropriate) is sent, potentially featuring the member in a "Member We Love" roundup or shouting out their intro with humor. Ask: "What's one thing you'd love help with right now?" is sent. **Day 7:** A Resource Recommendation DM is sent, personalized based on interests. New members are invited to the weekly kickoff event. A "FOMO Bomb" is deployed, inviting the member to an exclusive event or mini-challenge. Goal: Achieve 75% first-week activity rate (Slack post, poll, event RSVP, etc). Goal: Generate 1 qualitative feedback point per new member in the first week. **Phase 2: Developing Engagement & Feedback Loops (Weeks 1 - 4)**

Ongoing (Week 1+): Members gain XP points for various activities (intro post, reacting, commenting, DMing mentor, feedback forms, event participation). Trello labels (Newbie Hatchling, Level 2 Initiate, Momentum Mage, Core Cult Member) are automatically updated based on XP thresholds, triggering Slack bot behavior and access to new challenges or shoutouts. Weekly XP cycles are tracked in Coda. Gamified labels are used in Trello to signify progress and unlock rewards. Habit reinforcement is designed through variable rewards, micro-challenges, XP streaks, and public XP visibility. Feedback is collected through various channels and categorized weekly (Collection & Categorization). Patterns and trends in feedback are identified (Pattern Identification). The impact of feedback themes on the community is assessed (Impact Assessment). Action plans (Quick wins, Strategic initiatives, Long-term considerations) are developed based on feedback (Action Planning). The loop is closed by documenting feedback and actions, communicating changes, and acknowledging contributors (Closing the Loop). Experiment ideas are generated and logged (potential link to a "Lab Rats Log in Coda"). Needs Assessment surveys are conducted to shape upcoming programs/initiatives. Community Health Indicators (Engagement Vitality, Community Culture, Knowledge Exchange, Member Journey, Leadership Health) are monitored. A Community Health Index (CHI) is calculated as a weighted average of dimension scores. Weekly: Minimum goal of 3 meaningful replies to mentee threads, 1 initiated thread or check-in prompt, 1 personalized DM follow-up, and 1 piece of feedback collected for mentors. Weekly Power Prompts (Slack Thread or Coda Embed) are dropped to surface ambitious ideas and encourage constructive friction. Bi-weekly feedback sessions are aimed for. **Week 3+ (Retention Loop):** A "What's next?" DM nudge is sent with an XP goal or spotlight option. Members are invited to become a buddy/mentor-in-training. Members are added to a contributor thread (ideas, shoutouts, guest-hosting). An NPS survey or 3-minute feedback round is conducted. Members are tagged as "active core" if they have 3+ weeks of participation, triggering rewards or badges. **Day 30 (One Month Anniversary):** A DM is sent: "Your first month with PM Mentality - What's next?" Ongoing Community Activities

Regularly: Conditional Formatting is used in dashboards (Google Sheet/Coda) to visually indicate KPI health (Green, Yellow, Red) and trends (Up, Down, No Change). Meetings are tracked with action items, owners, due dates, and statuses. Community Culture and Values are reinforced through community-wide messages and integrated into onboarding materials. Behavior Modeling templates are used to address specific situations constructively. Brag Bites are encouraged for members to share accomplishments in a running thread or Coda view. Mentor KPIs (Mentee Response Rate, First Engagement, Feedback Quality Rating, Mentor Pulse Participation, Contribution to Knowledge Base) are tracked quarterly. Mentor-Mentee matching logic is applied based on key traits and compatibility matrices. Re-engagement sequences (Day 5 Public Nudge, Day 7 FOMO Bomb, Automated DMs/Emails/Trello labels for inactivity) are implemented. Bonus moves like "Comeback Kid" badges and a #resurrected-legends Slack channel are utilized for re-engagement. Surveys (Quick User Needs, User Context) and Interviews (Experience Mapping, Behavior Understanding, Deep Dive User Interview Guide) are conducted for user data collection and discovery. Personal Connection Templates (Personal Values & Motivation Explorer, Empathy Building Activity) are used. Relationship Leveraging Templates (Existing Relationship Enrichment Survey, Network Mapping Workshop Template) are utilized. Mentorship Communication Templates (Program Announcement, Mentor Welcome Email, Mentee Welcome Email, Mid-Program Check-in Survey, Success Story Template) are used. Community Engagement Templates (Community Member Profile Survey, Community Event Feedback Form) are used. Role-Based SMART Goals and KPIs for Community Culture, Experiments, Feedback, Learning Hub, and Community Voice are tracked. A Content & Learning Experience Tracker (Coda/Google Sheet) is maintained with tabs for Content Calendar, Top Used Resources, Mentor Activity Log, Member Highlights, Experiments Log, Monthly Wins Wall, and New Member Pipeline. Escalation needed messages are used to tag the Team for blockers. Community Situation Responses (Skeleton Replies) are used. Feedback templates for declining engagement follow-up and formal exit surveys are implemented. Community-wide messages and direct messages are used for celebrating milestones and documenting member impact. Community culture and values are reinforced and integrated into onboarding materials. Behavior modeling is used to guide how the community handles specific situations. Needs assessment surveys are conducted for program development. **Cast of Characters** This list includes the principal people and roles mentioned in the provided sources, along with brief descriptions of their roles and significance within the PM Mentality community context.

PM Mentality Community Engagement Specialist: This is the central figure responsible for designing, implementing, and optimizing the community's onboarding, engagement, and retention strategies for the PM Mentality community. They are highly focused on data, gamification, and creating a vibrant, productive environment. They are addressed with various informal and often playful nicknames by the "Chat" AI, reflecting the tone of the planning documents (e.g., "Miss Big Brain", "Nerdzilla", "Queen of Community Engagement", "Miss Ghosted-Guru™", "Professor of Project Management", "Professor Onboard-o-tron 9000", "Nerd Boss™", "Queen of Organized Chaos™", "Spreadsheet Cult Leader™"). **Mentors:** Experienced members of the PM Mentality community who guide and support newer members (mentees). They are crucial for knowledge sharing, fostering a supportive community culture, and their activity and impact are tracked through specific KPIs. Attracting and retaining valuable mentors is a key focus. **Mentees:** New or less experienced members of the PM Mentality community who are going through the onboarding process and seeking guidance from mentors. The onboarding and engagement strategies are heavily tailored to their journey and needs, with the goal of quickly integrating them into the community. **Team:** Refers to the core team supporting the PM Mentality community, including potentially program leads, operations personnel, or other internal staff. They are involved in internal sync meetings, prioritizing blockers, and implementing initiatives related to community engagement. They are tagged for escalation when blockers are identified. @Elena: Mentioned as a mentee in the Engagement Tracker Template, receiving a supportive mentor-style reply and feedback about her take on pacing. She serves as an example of a community member benefiting from the mentor program. @Stefano: Highlighted as a "BEST ENGAGER" for Slack within the PM Mentality community. He is known for using metaphors effectively and making even routine updates engaging, serving as a model for desirable engagement behavior. @Tia: Highlighted as a "BEST ENGAGER" for Slack within the PM Mentality community. She is described as a serial tagger and hype queen who uses

fire emojis strategically to boost energy and participation, serving as a model for desirable engagement behavior. @Jules: Highlighted as a "BEST ENGAGER" for Slack within the PM Mentality community. He is known for asking "weirdly specific" questions that encourage quieter members to participate and come out of hiding, serving as a model for desirable engagement behavior. @OtakuPM: Highlighted as a "BEST ENGAGER" for Discord within the PM Mentality community. He is characterized as the "King of '???' and side-eye emojis" who reacts to everything, illustrating a distinct style of engagement on that platform. @ModMilly: Highlighted as a "BEST ENGAGER" for Discord within the PM Mentality community. She is known for dropping memes with perfect timing and having an unmatched engagement ratio, serving as a model for desirable engagement behavior on Discord. @NoiseEngineer: Highlighted as a "BEST ENGAGER" for Discord within the PM Mentality community. He is known for building lore around members (e.g., "The Notion Witch," "Sprint Goblin"), contributing to a unique and engaging community culture. Chat (or Chat Gods): This refers to the AI or conversational interface that is providing feedback, generating templates, and interacting with the Community Engagement Specialist. The tone is often sarcastic, informal, and uses various playful and sometimes teasing nicknames for the specialist. The Chat's input is integral to the development and refinement of the community engagement strategy and documentation.

PM Mentality Community Study Guide PM Mentality Community Engagement Study Guide Quiz Answer each question in 2-3 sentences based on the provided source material. 1. What are the five core health dimensions used to calculate the Community Health Index (CHI) for the PM Mentality community? 2. Describe the calculation method for the Overall CHI based on the provided sources. 3. Identify two specific SMART goals outlined for the PM Mentality community's onboarding process. 4. What is the "3-Layer Cake Intro," and why is it used during onboarding? 5. Explain how gamification is incorporated into the PM Mentality onboarding process, citing at least one specific example. 6. According to the sources, what are mentors' key responsibilities and how is their performance tracked? 7. Briefly outline the five steps of the weekly feedback synthesis process used in the PM Mentality community. 8. Besides general engagement, what are two other categories of metrics tracked for the Community Engagement Specialist's role? 9. Describe the distinctive tone and voice found in the PM Mentality internal planning documents, and what purpose it serves. 10. What is the primary purpose of having re-engagement strategies and tactics for inactive members? Quiz Answer Key 1. The five core health dimensions are Engagement Vitality, Community Culture, Knowledge Exchange, Member Journey, and Leadership Health. These dimensions are weighted differently to contribute to the final CHI score. 2. The Overall CHI is calculated by first converting each indicator within the five dimensions to a 0-100 scale based on its current value relative to defined warning and healthy thresholds. Then, a dimension average is calculated from its indicators' scores, and the Overall CHI is the weighted average of these dimension scores. 3. 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Their performance is tracked quarterly using KPIs such as Mentee Response Rate, First Engagement, Feedback Quality Rating, Mentor Pulse Participation, and Contribution to Knowledge Base. 7. The weekly feedback synthesis process involves Collection & Categorization, Pattern Identification, Impact Assessment, Action Planning, and Closing the Loop. This ensures feedback is systematically gathered, analyzed, prioritized, and acted upon with communication back to contributors. 8. Besides general engagement (# of intro replies), metrics are tracked for Experiments (engagement delta), Feedback (response count, actionable items), Learning Hub (resource usage), and Community Voice (blocker themes surfaced). 9. The internal planning documents use a playful, sarcastic, and high-energy tone, often using nicknames for the Community Engagement Specialist. This tone is a deliberate "antidote to boring onboarding guides" and aims to create a more engaging internal environment. 10. The primary purpose of re-engagement strategies is to reactivate inactive or "ghosting" members. This involves sequences of communication and incentives, aiming to bring members back into active participation and contribute to overall community health metrics. Essay Format Questions 1. Analyze the PM Mentality community's phased engagement strategy, specifically focusing on the transition from Onboarding & Initial Engagement to Developing Engagement & Feedback Loops. Discuss the key activities and goals associated with each phase and how they contribute to long-term member retention. 2. Evaluate the importance of the Community Health Index (CHI) within the PM Mentality framework. Explain how the CHI acts as a comprehensive metric and discuss the significance of its five weighted dimensions in providing a holistic view of community well-being. 3. Discuss the role of gamification in the PM Mentality community. Provide specific examples of how XP points, badges, and other gamified elements are used during onboarding and ongoing engagement, and analyze their intended impact on member behavior and habit reinforcement. 4. Examine the closed-loop feedback system implemented in the PM Mentality community. Describe the process for collecting, analyzing, and acting upon member feedback, and explain why this systematic approach is crucial for continuous improvement and building trust. 5. Analyze the distinctive tone and voice used in the PM Mentality internal planning documents. Discuss the intended purpose of this tone, how it contrasts with traditional documentation, and provide examples of how it is manifested in the source material. 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□ Meeting Tracking Template

Meeting Title:

Date & Time:

Facilitator:

Attendees:

Location/Platform:

□ Agenda

1. Welcome & Objectives

- Brief overview of meeting goals.

2. Community Culture Updates

- New member introductions.
- Notable interactions on Slack, LinkedIn, Coda.
- Upcoming events or initiatives.

3. Engagement Experiments

- Review of recent experiments and outcomes.
- Discussion of new ideas for engagement.

4. Feedback Collection

- Summary of recent feedback received.
- Plans for addressing feedback.

5. Learning Experience Enhancements

- Updates on Coda hub improvements.
- Discussion on resource clarity and accessibility.

6. Community Voice

- Identification of blockers or unmet needs.
- Suggestions for new initiatives.

7. Action Items & Next Steps

- Assignments and deadlines.

□ Action Items

Task Owner Due Date Status

□ SMART Goals & KPIs

1. Build & Maintain Community Culture

- *SMART Goal:* Increase member engagement by 20% over the next quarter.
- *KPI:* Number of active participants per week.

2. Drive Engagement through Experiments

- *SMART Goal:* Implement 3 new engagement strategies monthly.
- *KPI:* Participation rates in new initiatives.

3. Collect & Translate Feedback

- *SMART Goal:* Conduct bi-weekly feedback sessions.
- *KPI:* Number of actionable insights gathered.

4. Shape the Learning Experience

- *SMART Goal:* Update 100% of learning resources by end of Q2.
- *KPI:* User satisfaction scores on resource usefulness.

5. Be the Voice of the Community

- *SMART Goal:* Identify and address 5 major community concerns quarterly.
- *KPI:* Resolution rate of reported issues.

☐ Discussion Prompts

- Which community segments are most engaged, and why?
- What feedback trends are emerging?
- Are there any barriers to participation we need to address?
- How can we enhance the learning resources for better accessibility?

For additional resources, you might find these templates helpful:

- [Smartsheet Project Management Meeting Agenda Templates](#)
- [ClickUp Meeting Tracker Template](#)
- [Lark Meeting Tracker Template](#)

Would you like assistance in customizing these templates further or integrating them into your preferred platforms like Google Workspace, Trello, or Discord?

Community Engagement Specialist Roadmap: From Setup to Success

Let me break down a practical roadmap for implementing your community engagement strategy with all the PM rigor it deserves. This isn't just about creating documents—it's about building systems that drive real results.

Phase 1: Foundation & Benchmarking (Weeks 1-2)

Key Deliverables:

- Establish baseline metrics across all 5 responsibility areas
- Set up integrated dashboard connecting Trello + Google Sheets
- Develop community health scoring system

Implementation Steps:

1. **Audit current engagement levels** across all platforms (capture your "starting point")
2. **Research industry benchmarks** for similar communities at your stage
3. **Build your measurement infrastructure:**
 - Create master Google Sheet with conditional formatting for at-a-glance health monitoring
 - Set up Trello integration using Zapier or native power-ups to feed data automatically
 - Implement tagging system for categorizing community interactions

Pro Tip: Don't get lost in vanity metrics. For a mentorship community, depth of engagement (quality of interactions) often matters more than pure volume (number of posts).

Phase 2: Experiment Framework Development (Weeks 3-4)

Key Deliverables:

- Create engagement experiment template with clear hypothesis structure
- Build feedback collection system across touchpoints
- Establish experiment review cadence

Implementation Steps:

1. **Design your experiment blueprint** (problem → hypothesis → test → measure → iterate)
2. **Set up lightweight feedback channels:**
 - Quick-pulse emoji reactions
 - Micro-surveys (1-3 questions max)
 - Conversation starter prompts for qualitative insights
3. **Create your first experiment backlog** (start with 3-5 ideas maximum)

Pro Tip: Small tests yield faster insights. Instead of overhauling your entire approach, isolate variables: test a new welcome sequence while keeping everything else constant.

Phase 3: KPI Activation & Optimization (Weeks 5-8)

Key Deliverables:

- Finalized SMART KPIs with leadership buy-in
- Integration of metrics into weekly/monthly reporting cycles
- First optimization actions based on early data

Implementation Steps:

1. For Community Culture:

- Define specific "active participation" thresholds by member segment
- Establish NPS or sentiment tracking methodology
- Set up cohort analysis to track retention patterns

2. For Engagement Experiments:

- Implement A/B testing framework for new initiatives
- Create participation lift calculation methodology
- Establish minimum viable sample sizes for conclusive results

3. For Feedback Collection:

- Build insight categorization system
- Establish feedback-to-action pipeline with SLAs
- Develop closed-loop reporting for participants who provide feedback

4. For Learning Experience:

- Implement resource utilization tracking
- Create learning path completion metrics
- Establish knowledge application success indicators

5. For Community Advocacy:

- Set up issue tracking with resolution timeframes
- Create initiative adoption measurement framework
- Develop leadership action tracking system

Pro Tip: Use the 80/20 rule for your metrics. Identify the 20% of metrics that drive 80% of your community success, and prioritize those for deep analysis.

Phase 4: Automation & Scaling (Weeks 9-12)

Key Deliverables:

- Automated reporting workflows
- Playbooks for repeatable community processes
- Self-serve analytics dashboard

Implementation Steps:

1. **Set up automatic data population** in Google Sheets (via forms, Zapier, or APIs)
2. **Create Trello automation rules** for community management tasks:
 - Card creation for new member welcomes
 - Automated movement through experiment pipelines
 - Deadline reminders for engagement touchpoints
3. **Build reusable templates** for recurring community activities

Pro Tip: Document everything as you go. Your future self (and potential team members) will thank you for creating clear standard operating procedures.

Dashboard Integration: The Command Center

Your dashboard should unite all these elements into a single source of truth. Here's a practical structure:

1. Top-level scorecard:

- Overall health score (composite of key metrics)
- Trend indicators (up/down from previous period)
- Alert indicators for metrics falling below thresholds

2. Drill-down views:

- Member segment performance
- Platform-specific engagement
- Experiment status tracking

- Feedback theme analysis

3. Action center:

- Prioritized intervention opportunities
- Resource allocation recommendations
- Quick-win identification

Would you like me to elaborate on any particular phase or component of this roadmap? Or would you prefer I create a specific template for one of these deliverables to help you get started immediately?

Community Engagement Workflow Automations

This document provides concrete instructions for setting up powerful automations to streamline your community management workflows using Trello, Google Workspace, and Discord.

Google Sheets Dashboard Automations

1. Automatic Data Import from Trello

Setup Instructions:

1. Install the Trello Add-on for Google Sheets:
 - In your Community Dashboard Sheet, go to Extensions > Add-ons > Get add-ons
 - Search for "Trello" and install the official add-on
2. Create an import configuration:


```
=IMPORTTRELLOCARD("Board ID", "List Name", "Optional Card Filter")
```
3. Set up recurring imports for key metrics:
 - In your sheet, go to Extensions > Trello > Schedule Refresh
 - Set daily imports of active cards from your experiment boards
 - Set weekly imports of completed cards for reporting

2. Conditional Formatting for Metric Monitoring

Setup Instructions:

1. Set up health indicators in your Executive Summary tab:
 - Select your KPI cells
 - Choose Format > Conditional Formatting
 - Create rules for:
 - Green (>=100% of target): Background #b7e1cd
 - Yellow (80-99% of target): Background #fce8b2
 - Red (<80% of target): Background #f4c7c3
2. Create trend indicators:
 - Select % change columns
 - Set conditional formatting:
 - Positive change: ▲ in green (#0f9d58)
 - Negative change: ▼ in red (#db4437)
 - No change: ◆ in gray (#7e7e7e)

3. Automated Weekly Report Generation

Setup Instructions:

1. Create a report template in Google Docs
2. Set up Apps Script automation:
 - In your Google Sheet, go to Extensions > Apps Script
 - Create a new script named "weeklyReportGenerator"
 - Paste this code:

```
function generateWeeklyReport() {
  // Get the template
  var templateDoc = DocumentApp.openById('YOUR_TEMPLATE_DOC_ID');

  // Create a new doc for this week's report
  var newDoc = DocumentApp.create('PM Mentality Weekly Report - ' + new Date().toDateString());

  // Copy template content to new doc
  var body = newDoc.getBody();
  body.appendParagraph(templateDoc.getBody().getText());

  // Get data from the dashboard
```

```

var sheet = SpreadsheetApp.getActiveSpreadsheet().getSheetByName('Executive Summary');
var data = sheet.getRange('A1:F10').getValues();

// Replace placeholders with actual data
// [Implementation details would follow...]

// Email the report to team
var emailTo = "team@example.com";
var subject = "Weekly PM Mentality Community Report";
var emailBody = "This week's community report is attached.";
var pdfReport = newDoc.getAs('application/pdf');

GmailApp.sendEmail(emailTo, subject, emailBody, {
  attachments: [pdfReport]
});
}


```

3. Set a time-based trigger:
 - In Apps Script, click Triggers > Add Trigger
 - Choose weekly execution on Friday afternoons

Trello Workflow Automations

1. New Member Onboarding Automation

Setup Instructions:

1. In your Member Journey Trello board, click "Automation" > "Create Button"
2. Create a "New Cohort" button:
 - Name: "Create New Member Cohort"
 - Icon: 
3. Set the button actions:
 - Create a card in "New Member Cohort" list
 - Add a standardized checklist:
 - Send welcome messages
 - Create introduction thread
 - Schedule group orientation
 - First-week check-in
 - Add to resource access group
4. Set up a "When card is created in New Member Cohort" trigger:
 - Automatically assign to Community Engagement Specialist
 - Set due date for 1 week from creation
 - Add yellow "Onboarding" label

2. Experiment Pipeline Automation

Setup Instructions:

1. Create status change rules:
 - When card moves to "Currently Running":
 - Add "Start Date" to custom field with current date
 - Add standard "Monitoring" checklist
 - Send notification to team channel
2. Create measurement reminder:
 - When card has been in "Currently Running" for 7 days:
 - Add comment "Time for mid-experiment check-in"
 - Add yellow "Review Needed" label
 - Notify card owner
3. Create results documentation workflow:
 - When card moves to "Analysis Phase":
 - Add "Results Documentation" checklist:
 - Record final metrics
 - Document key findings
 - Identify next steps
 - Update experiment log in Google Sheet
4. Integration with dashboard:
 - When "Results" custom field is updated:
 - Run Zapier workflow to update Google Sheet
 - Create card in "This Week's Focus" on Community Management board to implement findings

3. Feedback Collection Automation

Setup Instructions:

1. Create recurring feedback cards:

- Use Butler command:

```
every Monday at 9:00 AM create card "Weekly Feedback Review" in list "Feedback Collection" with description "Gather
```

2. Set up issue escalation workflows:

- When label "Critical Issue" is added to a card:
 - Move to top of "Blockers & Concerns" list
 - Add all board members as watchers
 - Send notification to leadership channel
 - Create calendar event for review within 24 hours

3. Configure feedback closure tracking:

- When a card moves to "Insights & Actions":

☐ ENGAGEMENT SUPPORT PLAN (Slack Threads: 3+ Per Week)

☐ Weekly Goals

- 3 meaningful replies to mentee threads
- 1 initiated thread or check-in prompt
- 1 personalized DM follow-up based on a thread
- 1 piece of feedback collected (reaction, quote, or direct DM)

☐ Bonus if you start a friendly roast war or quote someone in a way that makes them feel like the main character of the week

☐ Engagement Tracker Template (Google Sheet / Coda / Notion)

Week	Thread Link	Type (Reply/Prompt)	Who You Engaged	Topic	Response Quality (1-5)	Feedback Noted	Follow-up Planned
W1	[Slack link]	Reply	@Elena	Burnout hacks	4	"Loved your take on pacing, thanks!"	DM to ask about blog
W1	[Slack link]	Prompt	Whole channel	"Toxic PM trait?"	5	Got 6 LOL reacts + 2 replies	Share best in #intros
...

Use emojis as engagement radar. If your post is crickets, you're being basic. Try again.

☐ Message Templates (Slack + Discord)

➤ Supportive Mentor-Style Thread Reply:

"Oof, that's a classic sprint spiral ☐. Been there. Curious—do you have a go-to ritual to reset when stuff gets chaotic? Asking for a 'friend' ☐"

➤ Sassy Check-in Prompt:

"Alright, thread lurkers. You've been watching in silence like it's reality TV. Time to drop your red flags as a PM. GO. ☐"

➤ Curiosity-Driven Feedback Bait:

"Quick pulse check ☐
What's been the weirdest thing you've *actually* enjoyed about onboarding so far? (Mine is stalking everyone's workflows)"

☐ BEST ENGAGERS TO STUDY + STEAL FROM

For Slack:

1. **@Stefano** – Obsessed with metaphors, makes even checklist updates sound like Shakespeare.
2. **@Tia** – Serial tagger + hype queen. Drops fire emojis like they're strategy.
3. **@Jules** – Asks *weirdly specific* questions that pull quiet folks out of hiding.

For Discord:

1. **@OtakuPM** – Reacts to *everything*, even when it doesn't warrant it. King of "???" and side-eye emojis.
2. **@ModMilly** – Drops memes with perfect timing. Her engagement ratio is unmatched.
3. **@NoiseEngineer** – Builds lore around members like "The Notion Witch" or "Sprint Goblin."

For LinkedIn:

1. **Rosie Sherry** – Community queen. Always replies like it’s tea time.
 2. **Erica Kuhl** – Shares real wins + asks subtle vulnerable questions.
 3. **David Spinks** – Posts feel like open-ended brain pokes. People can’t help but comment.
-

☐ Touch ‘Em in the Soul (Without Being Creepy™)

Use this 3-Part “Touch-Point” Framework in responses:

1. **Relate (shared struggle)**: “Ah, I’ve rage-quit retros over less.”
 2. **Reveal (mini story)**: “Last time I led a project like that, I accidentally caused a two-week Jira crisis.”
 3. **Re-engage (ask)**: “Curious how you framed that convo with your team?”
-

Wanna go next level? ☐

Let me build you a **custom Slack thread responder cheat sheet** with power openers, feedback bait lines, and emoji-as-signal decoding. Or I can rig your **Discord bot** to serve random “engagement dares” like “Post a voice note of you reading your last sprint review in a dramatic tone.”

Just say the word. Or blink. Or type like the chaotic overachiever you are.

Ready to throw this into your Coda tracker or want me to inject this right into the doc, Big Brain?

☐ Stage 1: Pre-Onboarding Prep

- ☐ **Account Setup:**
 - Send Slack + Coda invites at least 24h before start.
 - Pre-add to channels: #intros, #announcements, #mentor-match.
 - Auto-subscribe to Community Calendar.
 - ☐ **Resource Pack Prep:**
 - Send welcome email with starter kit (Coda + Trello links).
 - Include intro post template, event schedule, and FAQ.
 - Add optional memes folder for ☐vibe setting☐.
 - ☐ **Internal Prep:**
 - Assign onboarding buddy (mentor or team member).
 - Review mentee/mentor goals if known.
 - Pre-tag in Slack with customized welcome DM queued.
 - ☐ **Expectations Alignment:**
 - Add new joiners to onboarding tracking sheet.
 - Ensure checklist is customized per role (mentee/mentor/staff).
 - Schedule 15-min intro sync within first 3 days.
-

☐ 1. Status Overview

- Total new members: [X]
 - **Onboarded within 72h:** [X%]
 - **Activity in Week 1 (Slack + Event + Feedback):** [X%]
-

☐ 2. Patterns + Highlights

- **Checklist Stalls:** [Platform / Mentorship Wait / Event Fatigue]
 - **Engagement Highlights:** [Funny Icebreaker, Meme Post, Great Intro, etc]
-

☐ 3. Blockers + Friction

- Slack access issues? DM bottlenecks?

- Feedback fatigue or unclear prompts?
- **Mentor response time >48h?**

□ 4. Experiments

- = tested this
- ↑ or ↓ in engagement?
- Verdict: Keep / Kill / Iterate

□ 5. Community Voice

- □ What people *loved*: [Summary]
- □ What made them □: [Summary]
- Are we living up to the vibe? Or just posting into the void?

□ 6. Action Items

Task	Owner	Deadline
Improve Intro Prompt Variety	[Name]	[Date]
Mentor Onboarding Speed Boost	[Name]	[Date]
Feedback UX (form OR in-Slack emoji)	[Name]	[Date]

□ EXECUTION + VISUALIZATION PLAN FOR THE KPI DASHBOARD

We're building:

- **KPI Dashboard (interactive + visual)**
- Based on: **Coda** or **Notion**, whichever you're using (but I'll write it for Coda since your doc screams "Coda cultist")
- Visuals: Progress bars, emoji indicators, auto-updating stats, etc.

□ BASE STRUCTURE (Coda Tables Needed)

1. □ Member Data

Name Join Date Checklist % First Post Date Feedback Submitted Mentor Assigned Events Attended

2. □ Engagement Logs

| Member | Action | Date | Type (Post, RSVP, Feedback, DM, etc) |

3. □ KPI Tracker

Metric	Goal	Current	Status
Checklist Completion Rate	90%	Auto %	□ / △ / □
First-week Feedback Rate	75%	Auto %	□ / △ / □
Time-to-First-Post (<48h goal)	TRUE	Auto %	□ / △ / □
Mentorship Assignments in 72h	100%	Auto %	□ / △ / □
Staff Suggestions Implemented % [Goal]		Manual	TBD

□ AUTO-CALCULATIONS

Set up calculated columns to do the following:

- Checklist Completion Rate = Avg of checklist % from Member Data
- First-week Feedback Rate = Count of "Feedback Submitted = □" / Total members
- Time-to-First-Post = First Post Date - Join Date < 2 days? □

□ VISUALIZATION

Use:

- **Progress Bars** for % goals
- **Emoji Indicators:**
 - 🟢 = On target
 - 🟡 = Needs attention
 - 🔴 = Behind
- **Conditional Formatting:**
 - Green = Above Goal
 - Yellow = Near Goal
 - Red = Failing harder than your high school crush's mixtape career

📌 BONUS FLAIR

- Embed GIF reactions for milestones (e.g. “📌 First post in <48h! Welcome aboard!”)
- Add a filter for “Stuck Users” = Checklist < 50% AND No Engagement
- Leaderboard for most engaging mentors (yes, competitive chaos mode ON)

📌 Coda Page Layout

Page: Onboarding KPI HQ

Header: 📌 Community Pulse

Sub-header: “If you’re not measuring it, you’re just hoping real hard.”

Sections:

1. 📌 Quick Stats Snapshot (using canvas formulas)
2. 📌 KPI Table (use conditional formatting)
3. 📌 Mentor Leaderboard
4. 📌 Stuck Users Watchlist
5. 📌 Staff Tasks Tracker

📌 NEXT STEPS TO SET IT UP

1. **Build tables:** Use the schema above in Coda.
2. **Add buttons:**
 - “New Member Entry”
 - “Log Engagement”
3. **Add formulas:**
 - Progress %, Time-to-Post, etc.
4. **Visuals:**
 - Add conditional formatting
 - Insert emojis + conditional icons
5. **Set up syncs:**
 - Coda-Google Forms integration (for feedback auto-fill)
 - Slack Zapier workflow to log posts/reactions automatically

📌 STAGE-BY-STAGE EXECUTION PLAN

(For Mentees, Mentors, and Team – separately, because apparently clarity *matters*)

☐ ♀ **Mentees: "Help I just joined, what is this place??"**

Day 0-1

- ☐ Receive Slack & Coda invite (automated)
- ☐ Added to Trello tracker (mentor match prepped)
- ☐ Get welcome email (includes intro post, checklist, Slack guide)
- ☐ Auto-Welcome Bot tags in Slack
- ☐ Checklist link in email + pinned in Slack DM

Day 1-2

- ☐ Reminder ping at 48h if checklist untouched
- ☐ Prompted for intro post using 3-Layer Cake OR Roulette
- ☐ Light engagement: react, poll, RSVP to event
- ☐ Listed in "Who's New" Coda & Slack thread
- ☐ Small mission: Comment/post in #random or #your-journey

Day 3-7

- ☐ DM follow-up from mentor
 - ☐ Checklist at 50–90% (bot nags encouraged)
 - ☐ 1 Slack comment/post minimum
 - ☐ Feedback form filled (Google Form)
 - ☐ Matched with confirmed mentor in system
 - ☐ Added to "Starter Pack" or tagged in helpful threads
-

☐ **Mentors: "You're the adult in the room (sorry)"**

Day 0-1

- ☐ Notification of new mentee match
- ☐ Access to mentee checklist & Coda profile
- ☐ Mentorship intro DM within 24h (template provided)
- ☐ Confirm intro post published or help initiate one

Day 3-7

- ☐ Check in via Slack (1 DM or 1 public thread reply)
- ☐ Ensure mentee has 1 engagement action (comment/post/event)
- ☐ Submit mini-mentorship log (can be 2-sentence update)
- ☐ Flag issues or friction to community team

Ongoing (Weekly)

- ☐ Slack presence: 3+ thread support replies
 - ☐ Mid-season feedback via form or async check-in
 - ☐ Bonus: Nominate standout mentees for shoutouts
-

☐ **Team / Staff: "You run this circus"**

Daily / Ongoing

- ☐ Monitor automation flows (Slack, Trello, Coda)
- ☐ Manually DM if bots don't trigger (48h+ silence)
- ☐ Weekly sync: use Meeting Brief format
- ☐ Log drop-offs (checklist incomplete, no Slack activity, no intro post)

Weekly

- ☐ Update KPI dashboard (from Coda + Slack + Trello)
- ☐ Test 1 onboarding improvement per week (meme, badge, prompt)
- ☐ Share top intro post externally (LinkedIn, etc.)

Biweekly

- ☐ Onboarding review cycle: clean up stale checklists, reset dropped mentees
- ☐ Share “Voice of Community” digest with leadership (sentiment, issues, fun quotes)

☐ DO THIS FIRST: Gamified Trello Flow

Why? Because it locks in behavior, habit, and checklist dopamine fast. That onboarding flow needs to run like it’s on rails with glitter and threats.

☐ Trello Automation Templates:

Columns:

- ☐ Welcome Brain Dump
- ☐ First 24h Wins
- ☐ 72h Missions
- ☐ Identity Challenges
- ☐ Ongoing XP

Card Examples:

- ☐ Post your intro in Slack (w/ button to Slack)
- ☐ Try “Icebreaker Roulette”
- ☐ Drop your Identity Card (link Canva)
- ☐ DM your mentor + screenshot it
- ☐ React in 3 threads

Automation:

- Card moves to ☐ when checklist completed
- When all 72h cards done → auto-tag as “Level 2 Initiate”
- Slack bot notification on Level Up (Zapier or Slack workflow)
- Weekly auto-email summary: your XP stats + a leaderboard tease

☐ THEN: Canva Identity Card Generator

This one is sexy, high-visibility, but **low retention impact** unless it’s tied into Trello or Slack rewards.

Why do it second? Because without the Trello gamification layer, people just post pretty intros once and ghost us harder than your last situationship.

What you’ll want:

- 3–4 Canva templates, editable, drag-drop
- “Post your card” call-to-action in Slack
- Tie submissions to leaderboard or badges (e.g. “Identity Unlocked”)

TL;DR for your big forehead:

Priority	Flow	Outcome	Automation Potential
<input type="checkbox"/> FIRST	Trello XP Tracker	Checklist Completion + Retention	HIGH
<input type="checkbox"/> SECOND	Canva Identity Card	Engagement + Vibes	MEDIUM

Now lemme know if you want:

- Pre-filled **Trello template board** with automation cheats
- Canva card generator embedded in onboarding email
- Slack leaderboard hack to auto-show “Level Ups”

Choose your chaos, Professor Spreadsheet ☐☐

🔪 Feedback on Your Edits:

☐ Tone:

Dead-on. That “**you got this, but also here’s a glitter flamethrower in case you need it**” tone is just chef’s kiss. Friendly? ☐ Motivating? ☐ Slightly unhinged? ☐☐☐
 You’re hitting that sweet spot between “competent cult leader” and “your cool older cousin who got out of a pyramid scheme.”

☐ Clarity & Flow:

Your bullet flow is so smooth it makes butter look clumsy. Everything reads clearly and in a digestible rhythm. I can actually picture the flow of new members getting absorbed into the system like it’s a Pixar onboarding montage.

☐ BUTTTTTT (yes, there's always a butt):

☐ “*Powerful Intro Frameworks*” Section:

You *nailed* the vibe, but it’s a **little buried** at the bottom. That section is pure GOLD for driving engagement—it deserves to be teased earlier. Maybe in the “**First 72 Hours**” section as a mention? Like:

“Prompt them with a 3-Layer Cake or Roulette post (see Personality Frameworks below)”

Make them drool early, you know? ☐

☐ *Experiments Section*:

You're asking all the right questions—but what about a hint at **where** experiments get logged? Is it in Trello? Coda? Your brain’s fourth dimension? Drop a link, a tag, or at least make a cheeky comment like:

“See: Lab Rats Log in Coda for live experiments”

☐ *Gamification Mentions*:

You're close to ☐legendary tier☐ but wanna go full Pokémon-evolution? Connect the **light challenges** from onboarding with the **XP/badge ideas** from growth hacks. Maybe suggest a challenge in week 1 → earns badge → shows up on Coda profile. Boom, instant dopamine loop.

☐ Minor Thingy:

“Mid-season feedback summary delivered” (under Mentors)

☐ What is mid-season? Is this a game show? A romcom arc? Just clarify it’s like... bi-monthly or at the end of X week cycle or whatnot. Nerds like me wanna timeline that sucker.

☐ TL;DR for You, Queen of Organized Chaos™:

- ☐ Tease the 3-Layer Cake + Roulette stuff earlier!
 - ☐ Drop a link or name for the experiment tracker
 - ☐ Tie badges ↔ mini-challenges = serotonin bomb
 - ☐ Define “mid-season” or prepare to be asked by a Slack gremlin
-

☐ Re-Engagement Playbook: "Return of the Ghosts"

For: Ghosted Members (aka Slack phantoms)

Role: Community Necromancer™

Mission: Resurrect engagement without sounding desperate (you already are)

☐ Step 1: Identify the Ghosts

- Criteria:

- No Slack activity in 7+ days
- Checklist under 50%
- No response to mentor ping
- Tag in Coda as: ☐ Ghost ☐ Pending
- Auto-label in Trello: ☐ Needs Wake-Up Call

☐ Step 2: Re-Engagement Campaign (Multi-Touch)

☐ Day 1 — Soft Ping (Slack DM or Email)

Subject/Message: "We miss your chaotic genius ☐"

"Hey [Name], we noticed you haven't stirred the Slack cauldron in a bit. If life's wild, no sweat – just wanted to say your voice matters here (even if it's just memes)."

- Include 1-click shortcut: "Reactivate Checklist" / "Share a Win" / "Say Hi in #random"

☐ Day 3 — Meme Attack

Drop a "we miss you" meme or gif in DM.

Bonus: Use their intro post material (if any) to personalize the roast.

☐ Day 5 — Public Nudge (if appropriate)

- Feature them in "Member We Love" roundup or shoutout old intro.
- Use humor:

"Still wondering what happened to [Name]'s Notion addiction. Blink twice if alive."

☐ Day 7 — FOMO Bomb

Invite to exclusive event or mini-challenge.

"Secret challenge alert: only 5 invites, and you're on the list. Let's see what your ghost powers can do ☐♀"

⚙️ Automation Layer

- **Ghost Tracker View** in Coda (Last activity + Checklist %)
- Zapier Trigger:
 - If "No activity in 7d" → Slack DM
 - If "No checklist progress in 5d" → Email Reminder
- Trello Automation:
 - Label "☐ Needs Wake-Up Call" triggers card comment from mentor

☐ Goals & KPIs

Metric	Goal
Re-engagement Response Rate	50%
Ghost-to-Checklist Conversion	30%
Post-Reactivation Slack Action	1+ action
Member Sentiment (qualitative)	1 comment per 5 ghosts

☐ Bonus Moves (AKA Witchcraft for Retention)

- **"Comeback Kid" Badge** for returning ghosts
- Mini-challenge: "Ghostbusters Club" – revive another ghost with a DM
- Slack channel: #resurrected-legends (stories of returning members)
- DM script from mentors:

"I was gonna give up on you, but your vibe was too strong to ignore. Prove me right."

☐ Community Onboarding Master Kit (Coda Version)

☐ Trello Automation Tracker (for tasks and XP flow)

Columns for Onboarding Workflow:

1. ☐ Welcome Brain Dump

- Add member info, make this a catch-all for initial intro prompts, mentor assignments.

2. ☐ First 24h Wins

- Track small wins: Slack intro, event RSVP, early feedback submission. Card moves here automatically.

3. ☐ 72h Missions

- Critical “Level 1” tasks: Icebreaker post, mentor DM, check-in for engagement.

4. ☐ Identity Challenges

- Gamified tasks for personality profiling: Identity Card, meme share, or 3-Layer Cake intro. Add to Coda form with custom fields.

5. ☐ Ongoing XP

- XP tracker that rewards engagement: reacting to threads, commenting, responding in Slack threads.

Card Examples:

- ☐ **Post your intro in Slack** (link to Slack channel)
- ☐ **Try “Icebreaker Roulette”** (link to Coda icebreaker prompt generator)
- ☐ **Drop your Identity Card** (Canva link)
- ☐ **DM your mentor + screenshot it** (link to Slack DM)
- ☐ **React in 3 threads** (track engagement via Slack)

☐ Automation (via Zapier or Coda)

- **Checklist Completion:** Cards automatically move to "☐" when key tasks (intro post, mentor DM) are done.
- **Level 2 Initiate Tag:** After all 72h tasks are marked done, automatically tag as “Level 2” with email to confirm progression.
- **Slack Notification Bot:** Send DM when a member levels up.

Game Bonus:

- **Weekly Email Summary:** Sends XP stats and leaderboard highlights to encourage competition.

☐ Extra: Coda-Specific Elements

1. Member Tracking Dashboard (Coda Table)

- Track member data like time-to-first-post, feedback submission, and mentor engagement.

2. Slack Bot Sync (via Zapier)

- Automate notifications for intro post, feedback submission, and event RSVP reminders. When a member does something (like reacts in threads or posts), log XP in the Coda table.

3. Feedback Collection (Coda Form)

- After 72h, auto-prompt for feedback via Coda form embedded in your onboarding flow. Collect qualitative feedback from every new member!

☐ Bonus Features in Coda:

1. Canva Design Templates

- Embed your “Identity Card” template within Coda so new members can personalize it (auto-filled fields).

2. Slack Engagement Tracker

- Create a column that automatically tracks member engagement (posts, comments, reactions).

Now, if you’re asking how to *actually* get this in Coda:

1. Start a **New Doc** in Coda.
2. Use this outline, set up tables for each step, and then **link** those to automations in Slack or email (you know, Zapier, baby).
3. **Add buttons** for tasks like “Post Intro in Slack” to auto-submit tasks for members.

Step 1: Stop Copying Everyone Else

Yeah, you heard me. Stop watching *those* influencers who tell you they've figured it out. Stop mimicking every popular trend because you *think* it'll make you cooler. You're not a puppet, even if you sometimes *feel* like it.

Step 2: Take a Look at Yourself (For Real)

I know, it's hard to even look at yourself with all the cringey stuff you've done, but **look inside**. What makes you laugh? What *annoys* you? What pisses you off so much you can't shut up about it? You're a walking *reaction machine*, so just start from there. Your voice is a mix of your values, quirks, pet peeves, and what you care about.

Step 3: Be Unapologetically You

Yeah, I'm gonna hit you with this one: Don't *sugarcoat* it. No one cares if you're "trying to be nice" all the time. You're not a doormat, and you're certainly not "just trying to fit in." If your thoughts are loud, let them be loud. If they're sarcastic or sassy, let them fly. Don't mute your inner voice just to fit the mold, because guess what? Everyone else already does that and it's boring.

Step 4: Use Humor as Your Weapon

What's better than sarcasm? Nothing. Get used to it. Every time you drop a line, make it count. Use irony. Use exaggeration. Be dramatic. Get *real* comfortable with being misunderstood and "*cringe*." It's fun. You'll find that when you don't try too hard, you get more of that raw, authentic sound.

Step 5: Stop Giving a Damn About Approval

Listen up—everyone's got something to say, but not everyone's gonna *like* it. If you wait around for approval, you'll be stuck forever. *Say it*. Let it *land*. If they laugh, great. If they don't? Too bad. You don't need to babysit their feelings.

Step 6: Iterate

You think you've found your voice? Yeah, right. You'll be changing, tweaking, and *testing* out different tones, styles, and delivery methods for ages. And that's great. Don't expect to find perfection in the first draft of anything. Your voice will evolve with you.

So, when it's all said and done, your voice is just *you* turned up to 11. You might feel a little weird at first, but trust me, it's worth it. Now, do you think you can handle actually using it? Or are you just gonna keep second-guessing everything like usual? ☺

Clarify Your Brand Personality

You're not some random, "neutral" entity. Your brand has to have character—no, not the boring kind, but the type that stands out, grabs attention, and has *presence*.

1. Ask yourself:

- What is the vibe of the brand?
- Is it quirky? Professional? Casual? Funny? Serious?
- Is your community fun, supportive, edgy, or rebellious?

Think of it like creating a character. If your brand were a person, how would they dress, talk, and act? Write down those adjectives.

Step 2: Define Your Community Tone

Your community is like your loyal army. They follow, they engage, and if you do it right, they defend you like you're their best friend. You need to talk to them like you know them and understand them.

1. Questions to ask yourself:

- Do they want to be part of a cool club, or do they need a safe space to connect and vent?
- Do they like straightforwardness, or do they prefer a bit of humor and sass in the mix?
- How do they interact with each other? Do they post memes? Are they super supportive? Do they joke around?

Your community tone should mirror their behavior while amplifying it. You're creating a vibe, so don't be too formal unless that's your style.

Step 3: Consistency is Key

Now, let's get real for a second: You can't just be all over the place with your voice. One minute you're funny, the next minute you're serious? That's going to confuse everyone. You need consistency in how you talk, respond, and present your brand.

1. Create a voice guide that covers:

- Language style: Casual, professional, slang-heavy, or polished?
- Tone: Friendly, sassy, empowering, educational, or funny?
- Topics to avoid: What will *not* be tolerated or should be avoided?
- Personality traits: Smart, bold, witty, supportive, tough love?

Be sure you know exactly how to represent the brand every time. It's like a script. Not *too* rigid, but enough to be recognizable.

Step 4: Engage with the Community Like a Real Human

You're their leader, so if you're acting all robotic and distant, they'll sniff it out.

- Be conversational. No one likes a brand that speaks like a bot.
- Ask questions. Encourage feedback and make it feel like a conversation.
- Use humor (if that fits your vibe). Get in the game. Don't be afraid to *poke fun* or tease your audience.
- React in real-time. That's why your community needs to feel *alive*. Be there when something happens, and always give them something to respond to.

Step 5: Test, Learn, Adjust

If you're not testing your voice, you're just guessing. You need to see what works for your community and what doesn't. Just like a comedian tests jokes on an audience, you've got to figure out what hits and what falls flat.

- Look at engagement metrics: Which posts, comments, and responses are generating the most interaction?
- Experiment: Try different tones and styles. One post might be super edgy, while another is super positive. Find what works and adjust.
- Ask your community: Seriously, what's better than feedback from the people you're *trying* to impress? They'll tell you if you're killing it or if you sound like an awkward robot.

Step 6: Stay True to Your Core Values

Lastly, don't get caught up in trying to please everyone. Yeah, you'll make some people mad, but you can't please everyone. Stick to what your brand stands for and stay true to that.

- What's the mission of your brand?
- What kind of people do you want in your community?
- What do you want to inspire or make people feel?

Let these values guide your voice and make sure everything aligns. Don't just make noise for the sake of it. Your voice needs to serve your community's needs, not just throw out random words.

In a Nutshell

- Brand Personality: Know who your brand is. What adjectives describe it?

- **Community Tone:** Reflect the vibe of the people you want to engage with.
- **Consistency:** Stick to a voice guide.
- **Human Interaction:** Speak directly with people, no stiff corporate nonsense.
- **Test and Learn:** See what works and adjust.
- **Core Values:** Don't forget what your brand stands for.

Framework for Finding Your Brand & Community Voice

**Step 1: Audience Breakdown

Before you even think about your voice, you *need* to know who you're talking to. Because if you talk to everyone, you're going to talk to no one.

Questions to ask:

- **Who is your community?**
 - Age, interests, lifestyle, location?
 - What do they **value** the most?
 - How do they talk to each other? Are they jokers? Do they keep it chill? Are they more serious?
- **What problems are they facing?**
 - **Emotional** problems (stress, anxiety, confusion)?
 - **Practical** problems (struggling with certain tools, looking for help, etc.)?

The more specific you get here, the better you'll define your voice. Remember: You're not just talking to an abstract "audience"—you're speaking to *real* people.

Step 2: Brand Purpose + Personality

Now that you know who you're talking to, let's get into what *your brand* actually is. What makes you stand out from the sea of endless wannabes?

Questions to ask:

- **Why does your brand exist?**
 - What's your **mission**? (Purpose, goal, big picture)
 - Why would people **care** about your brand in the first place?
 - **What personality would your brand have if it were a person?**
 - Think: Sarcastic? Professional? Funny? Snarky? Witty? Empowering? Friendly?
 - **Write down** adjectives that best describe your brand's personality. Try 5–10 at first.
-

Step 3: Voice Tone Experimentation (First Round)

Here's the fun part: You get to try on different voices! Don't worry, we're not gonna sit around waiting for divine inspiration. We're going to **test** it out and see what feels right.

Questions to ask:

- **How do you want to come across?**
 - Do you want to be the friend that always brings humor or the leader that's motivating?
 - Do you want to come off as **authoritative**, **relatable**, or **playful**?

Try different "tones" and experiment with:

- **Formal tone** – Friendly, but a bit more polished.
- **Casual tone** – Super chill, like texting your best friend.
- **Humorous tone** – Add snark, sarcasm, and wit. Think: funny memes and jokes.

- **Empathetic tone** – Super supportive and validating.

Experiment with these tones in your posts and responses, and see how your audience reacts.

Step 4: Engagement Style

This is **critical**, and you’ve gotta figure this out fast: *How* are you going to talk to people directly? Are you going to lead discussions? React to posts with humor? Or make it feel like a tight-knit family?

Questions to ask:

- **What kind of communication do you want?**
 - Are you more **active** (leading discussions, responding quickly), or more **reactive** (waiting for comments and jumping in)?
 - What will your **community interactions** be like? Will you respond with humor, advice, or even challenge people?

Try:

- **Open-ended questions** – “What do you think about this?” or “How does this resonate with you?”
- **Reacting to comments** – Be funny, direct, or even sarcastic if it fits.
- **Active participation** – Post polls, quizzes, memes, or challenges to engage people.

It’s all about finding what makes people **interact** with your content.

Step 5: Messaging Guidelines & Filter

Now that you’re starting to get a feel for things, you **need** to keep everything consistent. If you don’t have any guidelines, things will go off the rails fast.

Build your voice guide (a mini cheat sheet for consistency):

- **What do you always do?**
 - Are you super *formal*? Do you always use **humor** in responses? What’s your default tone?
- **What do you never do?**
 - Are there words or attitudes you won’t use? (E.g., nothing “too harsh” or “too professional”)
- **What about certain topics?**
 - What’s your **no-go zone**? If someone makes a rude comment, are you quick to put them in their place, or do you gently redirect?

Write this out and keep it visible—this will be your brand’s **voice bible**.

Step 6: Continuous Testing + Feedback Loop

Now, you can’t just stop here. Your voice is a living, breathing thing. It needs constant testing, tweaking, and feedback. If you stop, it’ll get stale and boring. **No one wants that.**

Questions to ask:

- **What’s working?**
 - Look at engagement rates. What kinds of posts get the most comments, likes, shares, etc.?
- **What isn’t working?**
 - Are some responses falling flat? Is there a particular style that’s **not resonating**?

Action Plan:

- **Adjust your tone:** If something didn’t hit, change it up. Maybe you need to be a little more or less casual.
- **Refine your community interaction:** Maybe you need to engage a bit more or make your posts more **visually appealing**.

Repeat this testing phase every few weeks. You’ll never “settle” on one voice; it’ll evolve with your community.

In Conclusion:

- **Step 1:** Identify your **audience**.
- **Step 2:** Define your **brand purpose and personality**.

- **Step 3:** Test different tones.
 - **Step 4:** Establish your **engagement style**.
 - **Step 5:** Create a **messaging guide** for consistency.
 - **Step 6:** **Continuously test** and adjust based on feedback.
-

Framework for Attracting Mentor Personas with Your Brand & Community Voice

Step 1: Understand Mentor Needs & Desires (The Real Talk)

Mentors are **busy**. They're usually established, sought-after, and possibly tired of answering the same dumb questions. You're not just attracting anyone—you're attracting **valuable, experienced mentors** who want to engage with a *community* that's going places.

Questions to Ask:

- **What do mentors want?**
 - They're after **meaningful conversations** and **growth opportunities**, not just "likes" and "thumbs up."
 - They want to engage with **purpose-driven individuals** and communities. If they see potential and ambition in your brand, you'll stand out.
- **What problems are you solving for them?**
 - Maybe they want to pass on their knowledge and skills to the next generation, but only if they see the **passion and initiative** in the people they engage with.
 - Are you providing them with **valuable content** that helps them stay at the top of their game? Are you offering **insightful discussions** that challenge their knowledge?

Focus on **empowerment, growth, and challenge**. This is what mentors thrive on.

Step 2: Define Your Brand's Purpose as a Magnet for Mentors

Mentors will flock to brands that align with their **personal values** and **growth-oriented missions**. Don't just talk about how awesome you are—*prove it* with a laser-focused brand purpose that speaks to mentors' ambitions and professional goals.

Key Considerations:

- **Mentor-Focused Purpose:** What is your community's **bigger mission** that resonates with **leaders and mentors**? Do you focus on **leadership development, life-changing advice, or personal growth**?
 - Example: "We help passionate professionals who want to become better leaders by connecting with people who have been there and done that."
 - **Mentor Alignment:** Are you in a space that **mentors respect**? Think: education, entrepreneurship, leadership, development. The more **relevant** your brand's mission is to the mentor's field of expertise, the more likely you'll attract their attention.
-

Step 3: Craft a Voice that Appeals to Mentors—Professional Yet Relatable

Mentors want to feel like they're engaging with a brand that **values** their time and wisdom. They want to be respected, **but they also want authenticity**. Your community's voice needs to balance professionalism with **relatability**.

Voice Characteristics to Adopt:

- **Professional, but not stuffy:** Mentors don't want to feel like they're being lectured or talked down to. Keep it **authentic** and **respectful** but still **approachable**.
 - **Challenge and Inspire:** Don't just praise the mentor's advice—actively **ask for** it and **value their experience**. Engage them with **questions** that show you're open to learning and growing.
 - Example: "We're curious, @mentor_name—how would you approach this challenge?" Or, "Your thoughts on this, @mentor_name, are worth a million to us. What's your take?"
 - **Supportive:** Always support their contributions and frame the community as a **collaborative space**. Make them feel like a **key player**, not just a **resource**.
-

Step 4: Create Conversations that Attract Mentors

Mentors want to engage, but they don't want to waste time in **shallow interactions**. Your discussions need to be **high-caliber**, interesting, and **stimulating**—no fluff. Show them you're worth their time.

What Should You Discuss?

- **Advanced Topics:** Mentors love to talk about what they've learned over the years. Craft conversations around **real-world challenges**, **strategies**, and **life lessons**.
 - Example: "What's the biggest lesson you've learned in your career that most people overlook?"
 - **Open-Ended Challenges:** Don't be afraid to **ask them to share wisdom**. Use **thought-provoking** questions that require deep reflection.
 - Example: "In your opinion, what's the best way to prepare for failure, and how can young professionals bounce back from it?"
 - **Ask for Mentorship:** Yes, straight-up ask for it, but with **respect**. Frame it as an opportunity for them to pass on their knowledge to people who value it.
 - Example: "We'd be honored if you could share your perspective on [topic]. What advice would you give someone starting out?"
-

Step 5: Content That Resonates with Mentors

Your **content** isn't just for engagement—it's a powerful tool to **attract** mentors. You need to create content that speaks to their **interests**, **values**, and **expertise**.

Content Ideas:

- **Mentor Spotlights:** Feature mentors in the community. Ask for their advice and insights. This **highlights** their expertise and gives them the chance to **showcase their value**.
 - Example: "We were lucky enough to chat with @mentor_name about how they navigated the toughest challenges in their career. Here's their incredible advice."
 - **Thought Leadership Articles:** Post deep dives into areas where mentors can contribute their knowledge and experience. Ask them for their **opinion** on a trending issue.
 - Example: "We're discussing the future of leadership development. Here's where we think it's headed. What are your thoughts on this, @mentor_name?"
 - **Q&A Sessions with Mentors:** Host Q&A sessions where mentors can answer the community's burning questions. This gives them **visibility** and positions them as a **trusted expert**.
-

Step 6: Make Engagement Effortless and Rewarding

Mentors are busy, so don't expect them to just pop in for a chat without a **reward**. If you want to keep them engaged, you need to create **systems** that respect their time while still offering value.

Ways to Engage:

- **Mentor-Exclusive Spaces:** Create a **special section** in your community where mentors can discuss ideas, share resources, or just network. Make this space a **valuable reward** for their time.
 - **Recognition:** Publicly recognize **mentors' contributions**. Give them **credits** for sharing their expertise, whether through shout-outs or featuring them in newsletters.
 - **Collaborative Content Creation:** Don't just ask them for advice—ask them to **collaborate** on content like blog posts, videos, or webinars. This lets them contribute at a higher level, and they'll feel more involved.
-

Step 7: Keep Iterating and Refining

Finally, mentors aren't going to stick around for the long term if they don't feel their contributions are valued. You've got to **refine** your approach continuously based on their feedback.

What to Track:

- **Engagement Levels:** Are mentors actively engaging in discussions? Are they contributing ideas, or do they just pop in and leave?
 - **Content Performance:** Are the posts where you tag mentors getting more attention? Do their responses lead to deeper discussions in the community?
 - **Feedback:** Ask mentors for feedback. Be open to their suggestions for how the community can improve.
-

In Conclusion:

To attract **mentor personas**, you need to:

1. **Understand their motivations** (value growth, meaningful interactions, leadership).
2. Create a **professional yet approachable voice**.

3. Foster **high-level discussions** that challenge and inspire.
4. Produce **content** that resonates with their expertise and allows them to shine.
5. **Respect their time** by offering meaningful recognition and opportunities for engagement.

Bonus Tip: Make sure you're consistent! Mentors are busy and will bounce if they don't see **continuous** high-quality interactions. Keep the quality up, and they'll come back for more.

Now, go get yourself a mentor, and stop wasting my time. ☺

1. Value Growth

Mentors want to feel like they're **growing** personally and **professionally**. It's not just about *passing on knowledge*—it's about **being part of something bigger**, something that challenges them and makes them rethink their own strategies.

Why Does This Matter?

- **Growth = Relevance:** Mentors want to stay relevant. They're constantly looking for new ways to improve their skills, perspectives, and understanding of their industry.
- **Legacy and Impact:** They want to leave a **lasting legacy**, which is why they seek **value growth**—not just in themselves but in the people they mentor too. Helping others grow reflects back on their ability to grow.

How to Tap Into This?

- **Provide Learning Opportunities:** Create spaces in your community where mentors can also be **challenged**. Give them **advanced discussions** or **new perspectives** they might not have thought about. This way, they get to engage in their own **growth** while helping others grow.
 - **Content That Pushes Boundaries:** Share thought-provoking content that challenges their current thinking. For example, ask them to tackle "What's the one thing that's changed your perspective in the last year?" or "What's the most underrated trait of effective leadership?"
-

2. Meaningful Interactions

Mentors don't want to be **background noise** or just **answers on demand**. They want **authentic conversations** with people who value them—not just **followers**, but people who are genuinely interested in **what they have to offer**.

Why Does This Matter?

- **Impact Over Quantity:** A mentor wants fewer but **higher quality** interactions that feel **purposeful**. They want to see the fruits of their labor in the form of **real growth**, not just surface-level exchanges.
- **Recognition:** They want to know they're making a **difference**. Meaningful interactions show them that their time and advice are being **valued** and **used**.

How to Tap Into This?

- **Ask Deep Questions:** Engage them with questions that require thoughtful, reflective answers. Don't settle for "What's your advice for this?" Instead, go for "What's the toughest challenge you faced early in your career, and how did you overcome it?"
 - **Real Conversations, Not Just Soundbites:** Instead of treating mentors like **answer machines**, engage them in **conversations** that reflect the **depth** of their experience. Get into a back-and-forth dialogue where you can learn from them **and** they can learn from others.
-

3. Leadership

Mentors are, by nature, **leaders**. They've got the experience, they've earned the trust, and they've faced their own challenges. Their role isn't just to give advice, but to **inspire, empower, and guide** others toward becoming **better leaders** themselves.

Why Does This Matter?

- **The Power of Influence:** They're not just teaching—they're shaping the future. They want to **empower others** to lead in their own right, ensuring that the next generation has the tools and **skills** to take the torch.
- **Self-Reflection and Accountability:** By mentoring, they're **reinforcing their own leadership**. They're constantly learning what makes others tick, which challenges their own views and hones their leadership.

How to Tap Into This?

- **Encourage Leadership Development:** Your community should emphasize **leadership skills**. Create content or spaces for discussions around **leadership** and **team-building**, and ask your mentors to lead those conversations.
 - **Mentorship as a Two-Way Street:** Allow mentors to feel like they're **developing** as much as the people they mentor. Show them how their leadership **grows** as they teach others. When they feel like they're **improving** as leaders, they're more likely to stay engaged and invest their time.
-

In Summary, Here's What You Need to Know:

1. **Value Growth:** Mentors are looking for **personal and professional growth**—they want to feel like they're **constantly evolving** and their time is spent on people who are serious about growth.
2. **Meaningful Interactions:** They crave **authentic, high-quality interactions**. It's not about quantity—it's about leaving a **lasting impact** on people who appreciate their guidance.
3. **Leadership:** Mentors are **natural leaders**, and they want to be **empowered** and respected. They're interested in **inspiring** others to be leaders as well.

☐ Key Voice Tweaks to Apply Throughout

1. Professional

- Clear, concise language with structured headers and bullet points.
- Use active voice and action-oriented phrasing.
- Tone is confident but not overhyped.

2. Approachable

- Keep the fun elements (like emojis and playful headers), but balance them with clarity and purpose.
- Soften aggressive humor—keep it quirky and upbeat instead of snarky or chaotic.
- Use friendly, inclusive language like “you’ll find,” “we recommend,” “feel free to.”

☐ Example Refinement

Original:

Why? Because it locks in behavior, habit, and checklist dopamine fast. That onboarding flow needs to run like it's on rails with glitter and threats.

Refined:

Why? Because it builds momentum, habits, and early wins. Think of it as an onboarding flow on rails—with a little sparkle and a lot of structure.

Original:

Ensure checklist progress: 50% completion target
Add to "Who's New" Coda view or Slack thread
Assign light engagement challenge: post or comment in #random or #your-journey

Refined:

- Target 50% checklist completion within the first 72 hours
- Highlight the member in the “Who’s New” section on Coda or Slack
- Invite them to join a light engagement challenge (e.g. post in #random or #your-journey)

If you'd like, I can go through the whole document and rewrite the tone consistently to hit this balance of pro + approachable. Want me to start with a specific section or the whole thing? ☺

☐ ☐ Level-Up Discussions: Thought Leader Sparks

For the bold brains who joined to *build* something — not just vibe in the corner.

☐ Goals:

- Surface ambitious ideas early
- Create space for constructive friction
- Empower new members to contribute meaningfully, fast

☐ Implementation Plan:

1. Weekly Power Prompt (Slack Thread or Coda Embed)

Drop a high-voltage question like:

- “What’s one sacred PM ritual you think is actually BS — and why?”

- “If you had unlimited budget and zero stakeholders, what community experiment would you launch tomorrow?”
- “What’s one ‘unpopular truth’ about leadership that you’ve learned the hard way?”

2. Curated Micro-Forums (Opt-In)

Auto-tag newcomers by interest (via onboarding form or intro post) and invite them to:

- **Mini-Think Tanks** (small group DM or private thread): Rotate topics weekly
- **Lightning Rants Sessions** (15-min calls): Everyone gets 3 minutes to provoke the room

3. High-Stakes Hot Seat

After week 1, invite standout members to:

- Present a controversial opinion or idea
- Get rapid-fire feedback (with emoji-only reactions, live thread)

4. Badge Incentives: “Contrarian Catalyst” / “Deep Diver” / “Idea Grenadier”

Award badges for:

- Challenging a popular opinion (respectfully)
- Sparking a 20+ comment thread
- Offering a solution nobody saw coming

5. “Mentor vs Mentee Debate Nights” (Quarterly)

Have newbies and mentors go head-to-head on spicy topics.

Example debate: “Agile is just waterfall in disguise with a fancier hat.”

Wanna add this to the doc? Want me to rewrite it in your tone, sprinkle more glitter, or turn it into a systemized block like the others? Or are you scared the discussion's gonna be too advanced for your soft lil brain to handle, hmm? ☹

☐ **ADD: “Shine Zone” Section (New Members’ Brag Board)**

☐ **Why?**

Turn the spotlight on them early. Recognition creates retention. It also filters high-signal talent straight into the core community radar.

☐ **Section Title: “Brag Bites: Show Off Your Spark”**

Add to Stage 3 or Bonus section.

Instructions for new members:

"Drop 1 screenshot, link, or voice memo that shows off something you’re proud of—big or small. Did you run a killer retro? Build an internal tool? Invent a Slack emoji taxonomy? THIS IS YOUR MOMENT."

Then add a running thread or Coda view with:

- ☐ Name
- ☐ Brag Bite
- ☐ Peer Shoutouts
- ☐ Tag: Skill or Theme (“Product Ops,” “Meeting Magic,” “Unicorn PM”)

☐ **ADJUST: Feedback Form Prompts to Let Them Flex**

Current Goal: Get 1 qualitative feedback point per new member.

Update the form to include “Let Us Brag About You” prompts:

- “What’s something weirdly specific you’re amazing at?”
- “What should people come to you for?”
- “What’s one challenge you’ve crushed that others might struggle with?”

Then you can:

- Surface this in onboarding highlights
- Auto-mention them in relevant future convos (via Slack bots or Coda triggers)

☐ **INSERT: “Mentor Spotlight Moments” in Slack**

Encourage mentors to post short “Mentor Spotlights” where they praise something *specific* about their mentee publicly after 72h.

Example format:

☐ **Mentor Spotlight:** [@Name] This week’s dopamine injection: [Thing they did]. ☐ You better keep an eye on this one. ☐
ts.

☐ Силни страни (и не, не говорим за трицепсите ти от copy-pasting)

1. Ясен, структуриран, визуално приятен формат.

Сериозно, ако това беше конкурс за най-много bullet points, щеше да вземеш злато и да си направиш трофей с Notion лого.

2. Глас и тон:

Браво, Nerdzilla. Имаш one consistent voice — хем забавен, хем целенасочен. Пак си въвела тази полу-саркастична, meme-friendly стилистика, която действа като антидот на скучните onboarding гайдове.

3. Епичен use на gamification:

Level Up системата в Trello, XP статистики, мини-челинджи... буквално се усеща като onboarding RPG. Готино, ако не броим факта, че хората ще се чувстват виновни, ако не направят интро поста си като haiku в рима.

☐ Облаци на хоризонта (а.к.а. къде започва срама):

1. Прекалено дълго за реалния attention span на новите.

Говорим си за хора, които имат 13 отворени таба и Slack ping-ове на всеки 6 секунди. Това не е „Onboarding Kit“, това е **Community Bible 3.0**.

☐ Suggestion: Раздели го на bite-sized versions — „Starter Pack“, „Next Level“, „Mentor Guide“, etc.

2. Къде е "Why Should I Care"?

Сякаш липсва мотивационен луп — какво ще спечели потребителят, ако изкара onboarding-а като champion?

☐ Suggestion: Добави секция „What's in it for you?“ – хората искат слава, връзки, и... Slack emoji реакции. Направи го ясно.

3. Вътрешният Markdown meeting brief... сук.

Между меметата и Icebreaker Roulette, това звучи като Notion документ, който някой е кръстил „Final-Final-2-LAST-update-v7.md“.

☐ Suggestion: Или го вкарай в същия tone-of-voice (с леки roast-ове и flair), или го изнеси в отделен boring-but-useful internal doc.

☐ UX Nerd Feedback (за Queen Miss Brainiac™):

- Имаш 234783 идеи, но трябва малко **flow control** – къде започва човек, къде свършва, и какво следва нататък?
- Някои секции могат да са collapsible или под формата на tabs / toggles, ако го качиш в Coda/Notion.
- Trello + Slack + Coda = ☐△ Context switching hell.

Може ли да има one-pager или Command Center, който агрегира важните действия?

За финал – Roast Section™:

- “Welcome Brain Dump”? Това име звучи като community onboarding след хранително натравяне.
 - „Gamified flow с glitter and threats“? Явно ти е останал PTSD от корпоративен onboarding с PowerPoint от 2009.
 - „Find your PM twin!“ – чудесна идея, ако искаш хората да rage quit още първата седмица, щото нямат съвпадение.
 - “Share a haiku”? Бе, ти хора ли онбордваш или ги караш да кандидатстват в Hogwarts?
-

☐ Toolkits & Resources

☐ Mentor Resource Pack

- 1-pager: how to support new members in their first 2 weeks

- Sample prompts to use if mentee is quiet or ghosting
- Quick FAQ: where to find stuff, how to explain onboarding

☐ **Member Starter Pack**

- Slack etiquette cheatsheet
- Coda how-to guide (with gifs)
- Top 3 threads to read & react to
- Calendar sync button
- “Who to follow” recs for community leaders

☐ **Community Team Ops Manual (internal)**

- Roles & response time expectations
- How to escalate tech or access issues
- Feedback loop protocol
- Weekly check-in ritual prompts

☐ **Outro: What Success *Feels* Like**

If we do this right...

- People show up feeling like they belong within *days*, not weeks.
- Newbies say, “*Wait... this feels like my kind of weird.*”
- Mentors feel proud they made a real dent.
- Team stops spending hours chasing people—energy goes into leveling them up.
- The community builds momentum instead of bottlenecks.

And you? You get to brag that your onboarding doesn’t suck. ☺

Let’s make ‘joining’ feel like ‘arriving.’

#MicDrop ☐

Let me know if you want a stripped-down Notion version or a printable PDF too ☺

☐ **Still Needed to Finish This Beast:**

1. ☐ **Retention & Re-Engagement Templates**

- Pre-built DMs or email nudges for Week 3+ (“Where ya at?” check-ins)
- Templates for inactive members (“We miss you + quick survey link”)

2. ☐ **Mentor Toolkit**

- Mini Guide: “How to be a decent mentor without losing your soul”
- List of DM prompts for mentor follow-ups
- How to spot a ghost (and when to reassign mentees)

3. ☐ **Persona-Based Onboarding Variants**

- Different tracks/templates for: async lurkers, loud joiners, event chasers
- Slight tweaks to checklist flows or welcome copy based on user type

Oh, look! Personalization? Never thought you’d get that fancy... how are we still alive from the shock?

4. ☐ **Feedback Loop System**

- Where do feedback form responses go? Who reads them? When do we act on them?
- Visual dashboard in Coda or Notion for quick skim of top pain points

5. ☐ Event-Driven Onboarding Tactics

- How to align onboarding around major launches or events (event-first flow!)
- Urgency template: “You joined *just* in time for X...”

6. ☐ Progression / Rewards System

- Define Levels (Level 1 = onboarded, Level 2 = contributed, etc.)
- Badges, role updates, or feature privileges
- Can your Trello zap actually crown them “Meme Wizard”? Yes? Good.

☐ Персонализиране на Community Onboarding Master Kit (а.к.а. да не е за работи без душа)

1. Tone Customization: "Personality Sync Injection™"

Добави раздел за избор на стил/тон, който новодошлите могат да изберат – примерно:

Choose your onboarding flavor:

- ☐ *Wholesome & Chill* – gentle nudges, no pressure, warm vibes
- ☐ *Spicy & Bold* – sass, humor, roast-style love
- ☐ *Nerd Mode* – deep dives, frameworks, & productivity hype
- ☐ *Gamified Chaos* – unlock XP, complete dares, chase dopamine

☐ Приложи:

- Промени съдържанието на DM, бота, и първото интро според стила.
- Бонус: може дори глас или емоджи тема в Slack да върви с избора (чист mindfuck за скуката).

2. Custom Icebreaker Generator v2.0™

Всеки onboarding стил получава свои уникални prompts:

- **Spicy & Bold:**

“Какъв е твоят cringe productivity flex?”
“Нещо, което мразиш, но правиш, щото си 'отговорен възрастен'.”

- **Wholesome & Chill:**

“Какъв vibe искаш от тази общност?”
“Последното нещо, което те накара да се усмихнеш?”

- **Nerd Mode:**

“Любим productivity tool и защо е по-добър от всички останали?”
“Ако имаше API за приятелство, какво би включвал?”

3. Mentor-Matching по стил

Това да пратиш луд extrovert с introvert, дето иска просто да lurk-не тихичко? *Тотален fail.*

Какво правиш:

- Лек стилев тест в onboarding формата → tag в Trello → assign mentor със сходен стил.
- Името на ментора също може да е в тона:
 - “☐ Chief Sass Officer”
 - “☐ Calm Buddy”
 - “☐ Fellow Framework Goblin”

4. Intro Templates по персона

Добави pre-filled пост шаблони според vibe:

For Spicy People™:

“I’m [Name], I joined for the chaos, stayed for the memes. My red flag? I ship sprints without QA. AMA.”

For Nerds:

“Hey, I’m [Name], current obsession: building Zettelkasten in Notion. I’m here to find my thinking tribe.”

For Chill Beans:

“Hi everyone ☐ Just happy to be here. Hoping to learn, vibe, and grow together ☐”

5. DM Automations w/ Mood Matching

- Автоматизираните съобщения да не звучат като писани от бот с лоботомия.
- Пример за Spicy Welcome DM:

“Yo [Name]! We saw your form and instantly knew you’re a menace (in a good way). Your XP bar starts *now*. First quest: roast yourself in #your-journey. Need help? Your mentor [MentorName] is equally unhinged.”

6. Leaderboard by Personality Zone

- Не просто leaderboard – *кастъмизиран*.
 - Spicy folks → “Chaos MVPs”
 - Chill folks → “Vibe Keepers”
 - Nerds → “Big Brain Club”
-

☐ **Wanna Go Too Far? (Ofc you do.)**

- Анимирани Slack реакции според персоналността
 - Persona-based badges:
 - “Lurker Supreme”
 - “Notion Priestess”
 - “Chaos Consultant”
 - “Emoji Abuser”
 - Мемефикация на системата: всеки intro пост unlock-ва мем с “какво те очаква” стил
-
-

☐ **Ultimate XP Tracking Loop™ (Trello x Slack x Coda Integration Layer)**☐ **Weekly XP Cycle (Coda-Driven)****XP Inputs (Log to Coda automatically):**

- ☐ Slack Activity:
 - +10 XP: Intro post
 - +5 XP: React to a thread
 - +15 XP: Comment in #random or #your-journey
- ☐ Mentorship:
 - +20 XP: DM mentor + screenshot (auto-track via upload form)
 - +30 XP: Respond to mentor DM
- ☐ Feedback & Forms:
 - +25 XP: Submit first feedback form
 - +5 XP: Submit suggestion/idea
- ☐ Event Participation:
 - +15 XP: RSVP
 - +25 XP: Attend + comment in thread

Weekly Bonuses:

- +50 XP: 72h Checklist fully complete
- +20 XP: 3+ thread engagements in one week

- +10 XP: Posted a meme or something funny

☐ Gamified Labels in Trello (Auto-Update via Coda Stats)

Label Name	XP Threshold	Slack Bot Behavior
<input type="checkbox"/> "Newbie Hatchling"	0–50 XP	Welcome ping + “Try your 72h Missions!”
<input type="checkbox"/> "Level 2 Initiate"	51–120 XP	Bot sends “you leveled up!” gif + next challenge card
<input type="checkbox"/> "Momentum Mage"	121–200 XP	Add to shoutout queue; unlock Icebreaker Pro prompt
<input type="checkbox"/> "Core Cult Member™"	201+ XP	Personalized DM + invite to be a Mentor-in-Training

☐ Slack Automation (via Zapier / Workflow Builder)

- **Every Sunday:**
 - Bot posts XP leaderboard in #general
 - Top 3 get emojis next to names, e.g. 🏆🥈🥉
 - “XP Gainers of the Week” shoutout
- **Every Level Up:**
 - Auto-DM with reward (e.g. exclusive resource, meme badge, or mini challenge)
 - Public celebration option → one-click “Flex in #wins” button

☐ Coda Dashboard Views (Auto-Update)

- **Member XP Profile View:**
 - Name | XP | Level | Last Activity | Slack Handle
- **Mentor Tracker:**
 - Mentee XP growth over time
 - Mentor Engagement (response rate, DM activity)
- **Engagement Heatmap:**
 - XP by Week / by Slack Channel / by Action Type

☐ Habit Reinforcement Design (a.k.a. Nerd Bait)

- ☐ **Variable Rewards:** Mystery XP drops (10–30) for surprise actions like reacting to a new post or sharing a meme.
- ☐ **Micro-Challenges:** Random popup card each week (e.g. “Drop your current workflow in a haiku = 20 XP”)
- ☐ **XP Streak System:** Daily micro-win actions (e.g. “log in + react = 5 XP”) tracked for streak rewards at 3, 5, 7 days.
- ☐ **Public Visibility:** Add “XP Stats” embed in the #starter-pack Slack thread + pin top gainers in Trello leaderboard

☐ Meeting Tracking Template

Meeting Title:

Date & Time:

Facilitator:

Attendees:

Location/Platform:

☐ Agenda

1. **Welcome & Objectives**
 - Brief overview of meeting goals.
2. **Community Culture Updates**
 - New member introductions.
 - Notable interactions on Slack, LinkedIn, Coda.
 - Upcoming events or initiatives.
3. **Engagement Experiments**
 - Review of recent experiments and outcomes.

- Discussion of new ideas for engagement.

4. Feedback Collection

- Summary of recent feedback received.
- Plans for addressing feedback.

5. Learning Experience Enhancements

- Updates on Coda hub improvements.
- Discussion on resource clarity and accessibility.

6. Community Voice

- Identification of blockers or unmet needs.
- Suggestions for new initiatives.

7. Action Items & Next Steps

- Assignments and deadlines.

☐ Action Items

Task Owner Due Date Status

☐ SMART Goals & KPIs

1. Build & Maintain Community Culture

- *SMART Goal:* Increase member engagement by 20% over the next quarter.
- *KPI:* Number of active participants per week.

2. Drive Engagement through Experiments

- *SMART Goal:* Implement 3 new engagement strategies monthly.
- *KPI:* Participation rates in new initiatives.

3. Collect & Translate Feedback

- *SMART Goal:* Conduct bi-weekly feedback sessions.
- *KPI:* Number of actionable insights gathered.

4. Shape the Learning Experience

- *SMART Goal:* Update 100% of learning resources by end of Q2.
- *KPI:* User satisfaction scores on resource usefulness.

5. Be the Voice of the Community

- *SMART Goal:* Identify and address 5 major community concerns quarterly.
- *KPI:* Resolution rate of reported issues.

☐ Discussion Prompts

- Which community segments are most engaged, and why?
- What feedback trends are emerging?
- Are there any barriers to participation we need to address?
- How can we enhance the learning resources for better accessibility?

For additional resources, you might find these templates helpful:

- [Smartsheet Project Management Meeting Agenda Templates](#)
- [ClickUp Meeting Tracker Template](#)
- [Lark Meeting Tracker Template](#)

Would you like assistance in customizing these templates further or integrating them into your preferred platforms like Google Workspace, Trello, or Discord?

Community Engagement Specialist Roadmap: From Setup to Success

Let me break down a practical roadmap for implementing your community engagement strategy with all the PM rigor it deserves. This isn't just about creating documents—it's about building systems that drive real results.

Phase 1: Foundation & Benchmarking (Weeks 1-2)

Key Deliverables:

- Establish baseline metrics across all 5 responsibility areas
- Set up integrated dashboard connecting Trello + Google Sheets
- Develop community health scoring system

Implementation Steps:

1. **Audit current engagement levels** across all platforms (capture your "starting point")
2. **Research industry benchmarks** for similar communities at your stage
3. **Build your measurement infrastructure:**
 - Create master Google Sheet with conditional formatting for at-a-glance health monitoring
 - Set up Trello integration using Zapier or native power-ups to feed data automatically
 - Implement tagging system for categorizing community interactions

Pro Tip: Don't get lost in vanity metrics. For a mentorship community, depth of engagement (quality of interactions) often matters more than pure volume (number of posts).

Phase 2: Experiment Framework Development (Weeks 3-4)

Key Deliverables:

- Create engagement experiment template with clear hypothesis structure
- Build feedback collection system across touchpoints
- Establish experiment review cadence

Implementation Steps:

1. **Design your experiment blueprint** (problem → hypothesis → test → measure → iterate)
2. **Set up lightweight feedback channels:**
 - Quick-pulse emoji reactions
 - Micro-surveys (1-3 questions max)
 - Conversation starter prompts for qualitative insights
3. **Create your first experiment backlog** (start with 3-5 ideas maximum)

Pro Tip: Small tests yield faster insights. Instead of overhauling your entire approach, isolate variables: test a new welcome sequence while keeping everything else constant.

Phase 3: KPI Activation & Optimization (Weeks 5-8)

Key Deliverables:

- Finalized SMART KPIs with leadership buy-in
- Integration of metrics into weekly/monthly reporting cycles
- First optimization actions based on early data

Implementation Steps:

1. **For Community Culture:**
 - Define specific "active participation" thresholds by member segment
 - Establish NPS or sentiment tracking methodology
 - Set up cohort analysis to track retention patterns
2. **For Engagement Experiments:**
 - Implement A/B testing framework for new initiatives
 - Create participation lift calculation methodology
 - Establish minimum viable sample sizes for conclusive results
3. **For Feedback Collection:**
 - Build insight categorization system
 - Establish feedback-to-action pipeline with SLAs
 - Develop closed-loop reporting for participants who provide feedback
4. **For Learning Experience:**
 - Implement resource utilization tracking
 - Create learning path completion metrics
 - Establish knowledge application success indicators
5. **For Community Advocacy:**
 - Set up issue tracking with resolution timeframes
 - Create initiative adoption measurement framework
 - Develop leadership action tracking system

Pro Tip: Use the 80/20 rule for your metrics. Identify the 20% of metrics that drive 80% of your community success, and prioritize those for deep analysis.

Phase 4: Automation & Scaling (Weeks 9-12)

Key Deliverables:

- Automated reporting workflows
- Playbooks for repeatable community processes
- Self-serve analytics dashboard

Implementation Steps:

1. **Set up automatic data population** in Google Sheets (via forms, Zapier, or APIs)
2. **Create Trello automation rules** for community management tasks:
 - Card creation for new member welcomes
 - Automated movement through experiment pipelines
 - Deadline reminders for engagement touchpoints
3. **Build reusable templates** for recurring community activities

Pro Tip: Document everything as you go. Your future self (and potential team members) will thank you for creating clear standard operating procedures.

Dashboard Integration: The Command Center

Your dashboard should unite all these elements into a single source of truth. Here's a practical structure:

1. **Top-level scorecard:**
 - Overall health score (composite of key metrics)
 - Trend indicators (up/down from previous period)
 - Alert indicators for metrics falling below thresholds
2. **Drill-down views:**
 - Member segment performance
 - Platform-specific engagement
 - Experiment status tracking
 - Feedback theme analysis
3. **Action center:**
 - Prioritized intervention opportunities
 - Resource allocation recommendations
 - Quick-win identification

Would you like me to elaborate on any particular phase or component of this roadmap? Or would you prefer I create a specific template for one of these deliverables to help you get started immediately?

Community Engagement Workflow Automations

This document provides concrete instructions for setting up powerful automations to streamline your community management workflows using Trello, Google Workspace, and Discord.

Google Sheets Dashboard Automations

1. Automatic Data Import from Trello

Setup Instructions:

1. Install the Trello Add-on for Google Sheets:
 - In your Community Dashboard Sheet, go to Extensions > Add-ons > Get add-ons
 - Search for "Trello" and install the official add-on
2. Create an import configuration:

```
=IMPORTTRELLOCARD("Board ID", "List Name", "Optional Card Filter")
```
3. Set up recurring imports for key metrics:
 - In your sheet, go to Extensions > Trello > Schedule Refresh
 - Set daily imports of active cards from your experiment boards
 - Set weekly imports of completed cards for reporting

2. Conditional Formatting for Metric Monitoring

Setup Instructions:

1. Set up health indicators in your Executive Summary tab:
 - Select your KPI cells
 - Choose Format > Conditional Formatting
 - Create rules for:

- Green ($\geq 100\%$ of target): Background #b7e1cd
- Yellow (80-99% of target): Background #fce8b2
- Red ($< 80\%$ of target): Background #f4c7c3

2. Create trend indicators:

- Select % change columns
- Set conditional formatting:
 - Positive change: ▲ in green (#0f9d58)
 - Negative change: ▼ in red (#db4437)
 - No change: ◆ in gray (#7e7e7e)

3. Automated Weekly Report Generation

Setup Instructions:

1. Create a report template in Google Docs
2. Set up Apps Script automation:
 - In your Google Sheet, go to Extensions > Apps Script
 - Create a new script named "weeklyReportGenerator"
 - Paste this code:

```
function generateWeeklyReport() {
  // Get the template
  var templateDoc = DocumentApp.openById('YOUR_TEMPLATE_DOC_ID');

  // Create a new doc for this week's report
  var newDoc = DocumentApp.create('PM Mentality Weekly Report - ' + new Date().toDateString());

  // Copy template content to new doc
  var body = newDoc.getBody();
  body.appendParagraph(templateDoc.getBody().getText());

  // Get data from the dashboard
  var sheet = SpreadsheetApp.getActiveSpreadsheet().getSheetByName('Executive Summary');
  var data = sheet.getRange('A1:F10').getValues();

  // Replace placeholders with actual data
  // [Implementation details would follow...]

  // Email the report to team
  var emailTo = "team@example.com";
  var subject = "Weekly PM Mentality Community Report";
  var emailBody = "This week's community report is attached.";
  var pdfReport = newDoc.getAs('application/pdf');


  GmailApp.sendEmail(emailTo, subject, emailBody, {
    attachments: [pdfReport]
  });
}
```

3. Set a time-based trigger:
 - In Apps Script, click Triggers > Add Trigger
 - Choose weekly execution on Friday afternoons

Trello Workflow Automations

1. New Member Onboarding Automation

Setup Instructions:

1. In your Member Journey Trello board, click "Automation" > "Create Button"
2. Create a "New Cohort" button:
 - Name: "Create New Member Cohort"
 - Icon: 
3. Set the button actions:
 - Create a card in "New Member Cohort" list
 - Add a standardized checklist:
 - Send welcome messages
 - Create introduction thread
 - Schedule group orientation
 - First-week check-in
 - Add to resource access group
4. Set up a "When card is created in New Member Cohort" trigger:
 - Automatically assign to Community Engagement Specialist
 - Set due date for 1 week from creation
 - Add yellow "Onboarding" label

2. Experiment Pipeline Automation

Setup Instructions:

- 1. Create status change rules:
 - When card moves to "Currently Running":
 - Add "Start Date" to custom field with current date
 - Add standard "Monitoring" checklist
 - Send notification to team channel
- 2. Create measurement reminder:
 - When card has been in "Currently Running" for 7 days:
 - Add comment "Time for mid-experiment check-in"
 - Add yellow "Review Needed" label
 - Notify card owner
- 3. Create results documentation workflow:
 - When card moves to "Analysis Phase":
 - Add "Results Documentation" checklist:
 - Record final metrics
 - Document key findings
 - Identify next steps
 - Update experiment log in Google Sheet
- 4. Integration with dashboard:
 - When "Results" custom field is updated:
 - Run Zapier workflow to update Google Sheet
 - Create card in "This Week's Focus" on Community Management board to implement findings

3. Feedback Collection Automation

Setup Instructions:

- 1. Create recurring feedback cards:
 - Use Butler command:

```
every Monday at 9:00 AM create card "Weekly Feedback Review" in list "Feedback Collection" with description "Gather feedback from mentees and team members"
```
- 2. Set up issue escalation workflows:
 - When label "Critical Issue" is added to a card:
 - Move to top of "Blockers & Concerns" list
 - Add all board members as watchers
 - Send notification to leadership channel
 - Create calendar event for review within 24 hours
- 3. Configure feedback closure tracking:
 - When a card moves to "Insights & Actions":

☐ ENGAGEMENT SUPPORT PLAN (Slack Threads: 3+ Per Week)

☐ Weekly Goals

- 3 meaningful replies to mentee threads
 - 1 initiated thread or check-in prompt
 - 1 personalized DM follow-up based on a thread
 - 1 piece of feedback collected (reaction, quote, or direct DM)
- ☐ Bonus if you start a friendly roast war or quote someone in a way that makes them feel like the main character of the week

☐ Engagement Tracker Template (Google Sheet / Coda / Notion)

Week	Thread Link	Type (Reply/Prompt)	Who You Engaged	Topic	Response Quality (1-5)	Feedback Noted	Follow-up Planned
W1	[Slack link]	Reply	@Elena	Burnout hacks	4	"Loved your take on pacing, thanks!"	DM to ask about blog
W1	[Slack link]	Prompt	Whole channel	"Toxic PM trait?"	5	Got 6 LOL reacts + 2 replies	Share best in #intros
...

Use emojis as engagement radar. If your post is crickets, you're being basic. Try again.

☐ Message Templates (Slack + Discord)

➤ Supportive Mentor-Style Thread Reply:

“Oof, that’s a classic sprint spiral ☐. Been there. Curious—do you have a go-to ritual to reset when stuff gets chaotic? Asking for a ‘friend’ ☐”

➤ Sassy Check-in Prompt:

“Alright, thread lurkers. You’ve been watching in silence like it’s reality TV. Time to drop your red flags as a PM. GO. ☐”

➤ Curiosity-Driven Feedback Bait:

“Quick pulse check ☐
What’s been the weirdest thing you’ve *actually* enjoyed about onboarding so far? (Mine is stalking everyone’s workflows)”

☐ BEST ENGAGERS TO STUDY + STEAL FROM

For Slack:

1. **@Stefano** – Obsessed with metaphors, makes even checklist updates sound like Shakespeare.
2. **@Tia** – Serial tagger + hype queen. Drops fire emojis like they’re strategy.
3. **@Jules** – Asks *weirdly specific* questions that pull quiet folks out of hiding.

For Discord:

1. **@OtakuPM** – Reacts to *everything*, even when it doesn’t warrant it. King of “???” and side-eye emojis.
2. **@ModMilly** – Drops memes with perfect timing. Her engagement ratio is unmatched.
3. **@NoiseEngineer** – Builds lore around members like “The Notion Witch” or “Sprint Goblin.”

For LinkedIn:

1. **Rosie Sherry** – Community queen. Always replies like it’s tea time.
2. **Erica Kuhl** – Shares real wins + asks subtle vulnerable questions.
3. **David Spinks** – Posts feel like open-ended brain pokes. People can’t help but comment.

☐ Touch ‘Em in the Soul (Without Being Creepy™)

Use this 3-Part “Touch-Point” Framework in responses:

1. **Relate (shared struggle)**: “Ah, I’ve rage-quit retros over less.”
2. **Reveal (mini story)**: “Last time I led a project like that, I accidentally caused a two-week Jira crisis.”
3. **Re-engage (ask)**: “Curious how you framed that convo with your team?”

—
Wanna go next level? ☐

Let me build you a **custom Slack thread responder cheat sheet** with power openers, feedback bait lines, and emoji-as-signal decoding. Or I can rig your **Discord bot** to serve random “engagement dares” like “Post a voice note of you reading your last sprint review in a dramatic tone.”

Just say the word. Or blink. Or type like the chaotic overachiever you are.

Ready to throw this into your Coda tracker or want me to inject this right into the doc, Big Brain?

☐ Community Onboarding Master Kit

For: PM Mentality | Role: Community Engagement Specialist (PM Mentality Brainiac Edition™)

☐ Onboarding Goals (SMART AF)

- Ensure **90% onboarding checklist completion** within 72 hours of joining.
- Achieve **75% first-week activity rate** (Slack post, poll, event RSVP, etc).
- Generate **1 qualitative feedback point per new member** in the first week.
- Attain **100% Slack + Coda access** within 24h of invite.

☐ Onboarding Journey Map

☐ Stage 1: Pre-Onboarding Prep

- Send Slack invite + Coda access within 1 hour of acceptance
- Assign mentor from shared mentor pool (Trello automation)
- Pre-fill checklist & add member to tracking dashboard
- Auto-schedule welcome email (includes Slack norms, intro post prompt, and checklist link)

☐ **Stage 2: First 72 Hours**

- Auto-Welcome Bot tags new member + assigns mentor
- Personalized DM from Community Team within 24h
- Checklist Reminder Bot pings at 48h of silence
- Encourage intro post with “3-Layer Cake” or Icebreaker Roulette prompt
- Trigger small win: react in Slack, RSVP to event, or submit feedback form
- Ensure checklist progress: 50% completion target
- Add to "Who's New" Coda view or Slack thread
- Assign light engagement challenge: post or comment in #random or #your-journey
- Begin mentor follow-up loop (DM prompt sent via Slack bot)

☐ **Stage 3: Week 1 Milestones**

- Slack engagement: 1+ post or comment
- Mentorship ping: 1:1 DM or comment exchange
- Feedback form submitted (voice-of-community system)
- Mentorship match confirmed & intro complete
- Member added to “Starter Pack” thread / resource hub

☐ **Stage 4: Week 2+ Integration**

- Invite to join 1 working circle or project-based thread
- Add member to the Seasonal Digest or showcase board
- Feature 1 spotlight post in Slack (#your-journey or #general)
- Share relevant event or opportunity link (personalized DM)
- Track participation in first async or live session (tag on Notion/Coda)

☐ **Stage 5: Retention Loop (Week 3+)**

- Send “What’s next?” DM nudge with XP goal or spotlight option
- Invite to become a buddy/mentor-in-training
- Add to contributor thread (ideas, shoutouts, guest-hosting)
- NPS survey or 3-min feedback round
- Tag as "active core" if 3+ weeks of participation & initiate reward or badge

☐ **Internal Sync: Meeting Brief (Markdown Format)**

Date: [Insert]

Owner: [Insert]

Attendees: [Community Team / Program Lead / Ops]

☐ **1. Status Overview**

- Total new members: ☒
- Onboarded within 72h: [X%]
- Active in Week 1: [X%]

☐ **2. Patterns + Highlights**

- Where people are getting stuck: [Platform / Checklist / Events]
- Notable intro posts / engagement highlights: [Paste or summarize]

☐ **3. Blockers + Friction**

- Any technical access issues?
- Feedback points about the welcome flow?
- Are mentors responding fast enough?

☐ **4. Experiments**

- What did we test?
- Did it increase response rates / reduce friction?
- Keep, kill, or iterate?

☐ **5. Community Voice**

- Summarize early sentiment or confusion
- Are expectations matching reality?
- Anything people love or hate?

☐ 6. Action Items

Task	Owner	Deadline
Create Slack Welcome Flow	[Name]	[Date]
Improve Onboarding Email	[Name]	[Date]
Add checklist gamification	[Name]	[Date]

☐ KPI Dashboard (per audience)

Mentees

- Time-to-first-post: Goal <48h
- Checklist Completion Rate: 90%
- First-week Feedback Response Rate: 75%

Mentors

• of mentees greeted in 72h: Goal = 100%

- Engagement support in Slack threads: 3+ per week
- Mid-season feedback summary delivered

Team / Staff

- Onboarding review cycle: Biweekly
 - Suggestions implemented: Track % of actionable ideas
-

☐ Storage, Tracking & Automation Tools

☐ Links

- **Coda Hub:** [link]
- **Trello Tracker:** Onboarding checklist, mentor matches, weekly logs
- **Slack Workflow:** Auto-Welcome Bot + Reminder Flow

Automation Plan

- Welcome Reminder Bot @48h silence
 - Google Form auto-tag to Coda DB
 - Calendar auto-subscribe in onboarding form
-

☐ Gamified Trello Flow

Why? Because it locks in behavior, habit, and checklist dopamine fast. That onboarding flow needs to run like it's on rails with glitter and threats.

☐ Trello Automation Templates:

Columns:

- ☐ Welcome Brain Dump
- ☐ First 24h Wins
- ☐ 72h Missions
- ☐ Identity Challenges
- ☐ Ongoing XP

Card Examples:

- ☐ Post your intro in Slack (w/ button to Slack)
- ☐ Try "Icebreaker Roulette"
- ☐ Drop your Identity Card (link Canva)
- ☐ DM your mentor + screenshot it
- ☐ React in 3 threads

Automation:

- Card moves to ☐ when checklist completed
- When all 72h cards done → auto-tag as "Level 2 Initiate"
- Slack bot notification on Level Up (Zapier or Slack workflow)

- Weekly auto-email summary: your XP stats + a leaderboard tease

☐ Bonus Sections (if you want to be THAT good)

☐ Templates

- Welcome Message DM
- Mentor Intro Prompt
- First Feedback Form Questions

☐ Engagement Mini-Challenges

- “React to your favorite icebreaker!”
- “Find your PM twin!” personality quiz
- “Share your current project like a haiku”

☐ Growth Hack Suggestions

- Add humor + memes to Coda onboarding doc
- Use badge / XP gamification in Trello
- Share best intro posts on LinkedIn to loop external engagement

☐ Powerful Intro Frameworks (for personality-rich posts)

☐ Idea: The “3-Layer Cake” Intro

Ask them to write a post in 3 parts:

1. **Top Layer (Fun Fluff):** Pick your vibe: a meme, a weird talent, or your guilty productivity pleasure.
2. **Middle Layer (Substance):** What brought you here, and what do you want to learn or give?
3. **Bottom Layer (Realness):** A challenge you’ve faced or a lesson that changed your work/life approach.

Example prompt:

"Hey fam! I'm [Name] and here's my 3-Layer Cake Intro ☐:

☐ My vibe is: 'Calendar sorceress meets dark-mode detective.' ☐ I joined PMM to finally stop yelling at Jira and find a tribe that gets it. ☐ Biggest recent win: Finally launched a side project after 6 years of fear. Ask me how I destroyed perfectionism with Notion and memes."

☐ Icebreaker Roulette (Random Prompt Generator)

Build a Slack bot or doc with rotating prompts like:

- “Your toxic PM trait in a dating app bio?”
- “If your current task was a movie, what’s the title?”
- “What’s your red flag in a team project?”
- “Most unexpected thing you learned from a past job?”

☐ ♂ The Identity Card Challenge

Gamify the intro with a template card:

☹ Name:
☐ Location:
☐ Current Role:
☐ Superpower:
☐ Weakness:
☐ Soundtrack for your workflow:
☐ DM me if you wanna talk about:

—> Let them post as an image, story-style (Canva templates FTW) or in Slack.

☐ Optional Add-ons to Deepen Personality Mapping:

- Add a “personality board” Coda form: music, memes, Enneagram/MBTI, favorite work tool
- Create Slack badges for intro themes: e.g., “Chaos Unicorn,” “The Fixer,” “Silent Strategist”
- Link each intro post to the member’s Coda profile card

ЯБАА, виждам, че днес си решила да си играем на „Queen of Community Engagement” ☐
Добре. Хвани се здраво, защото т’ва ще боли.

Ето обратна връзка на база на твоя текст:

☐ Силни страни (и не, не говорим за трицепсите ти от copy-pasting)

1. Ясен, структуриран, визуално приятен формат.

Сериозно, ако това беше конкурс за най-много bullet points, щеше да вземеш злато и да си направиш трофей с Notion лого.

2. Глас и тон:

Браво, Nerdzilla. Имаш one consistent voice — хем забавен, хем целенасочен. Пак си въвела тази полу-саркастична, meme-friendly стилистика, която действа като антидот на скучните onboarding гайдове.

3. Епичен use на gamification:

Level Up системата в Trello, XP статистики, мини-челинджи... буквално се усеща като onboarding RPG. Готино, ако не броим факта, че хората ще се чувстват виновни, ако не направят интро поста си като haiku в рима.

☐ Облаци на хоризонта (а.к.а. къде започва срама):

1. Прекалено дълго за реалния attention span на новите.

Говорим си за хора, които имат 13 отворени таба и Slack ping-ове на всеки 6 секунди. Това не е „Onboarding Kit“, това е **Community Bible 3.0**.

- ☐ Suggestion: Раздели го на bite-sized versions — „Starter Pack“, „Next Level“, „Mentor Guide“, etc.

2. Къде е "Why Should I Care"?

Сякаш липсва мотивационен луп — какво ще спечели потребителят, ако изкара onboarding-а като champion?

- ☐ Suggestion: Добави секция „What's in it for you?“ – хората искат слава, връзки, и... Slack emoji реакции. Направи го ясно.

3. Вътрешният Markdown meeting brief... сук.

Между меметата и Icebreaker Roulette, това звучи като Notion документ, който някой е кръстил „Final-Final-2-LAST-update-v7.md“.

- ☐ Suggestion: Или го вкарай в същия tone-of-voice (с леки roast-ове и flair), или го изнеси в отделен boring-but-useful internal doc.

☐ UX Nerd Feedback (за Queen Miss Brainiac™):

- Имаш 234783 идеи, но трябва малко **flow control** – къде започва човек, къде свършва, и какво следва нататък?
- Някои секции могат да са collapsible или под формата на tabs / toggles, ако го качиш в Coda/Notion.
- Trello + Slack + Coda = ☐ Context switching hell.

Може ли да има one-pager или Command Center, който агрегира важните действия?

За финал – Roast Section™:

- “Welcome Brain Dump”? Това име звучи като community onboarding след хранително натравяне.
- „Gamified flow с glitter and threats”? Явно ти е останал PTSD от корпоративен onboarding с PowerPoint от 2009.
- „Find your PM twin!“ – чудесна идея, ако искаш хората да rage quit още първата седмица, щото нямат съвпадение.
- “Share a haiku”? Бе, ти хора ли онбордваш или ги караш да кандидатстват в Hogwarts?

И така, госпожо "Onboarding Overachiever", ако искаш Chat-а да гласува, ще направим анкета по-късно, но засега:

Оценка: 9.3/10 — щеше да е 10, ако беше написан от човек, а не AI, който се е нахранил със 7 гайдлайна и половин Reddit thread.

...your last failure?”

- “Describe your workstyle using only emojis.”
- “What’s your ‘hot take’ about productivity tools?”
- “If your calendar had a theme song, what would it be?”
- “One thing you wish PMs would *stop* doing in meetings.”

☐ Toolkits & Resources

☐ Mentor Resource Pack

- 1-pager: how to support new members in their first 2 weeks
- Sample prompts to use if mentee is quiet or ghosting
- Quick FAQ: where to find stuff, how to explain onboarding

☐ **Member Starter Pack**

- Slack etiquette cheatsheet
- Coda how-to guide (with gifs)
- Top 3 threads to read & react to
- Calendar sync button
- “Who to follow” recs for community leaders

☐ **Community Team Ops Manual (internal)**

- Roles & response time expectations
 - How to escalate tech or access issues
 - Feedback loop protocol
 - Weekly check-in ritual prompts
-

☐ **Outro: What Success *Feels* Like**

If we do this right...

- People show up feeling like they belong within *days*, not weeks.
- Newbies say, “*Wait... this feels like my kind of weird.*”
- Mentors feel proud they made a real dent.
- Team stops spending hours chasing people—energy goes into leveling them up.
- The community builds momentum instead of bottlenecks.

And you? You get to brag that your onboarding doesn’t suck. 😊

Let’s make ‘joining’ feel like ‘arriving.’

#MicDrop ☐

☐ **Still Needed to Finish This Beast:**

1. ☐ **Retention & Re-Engagement Templates**

- Pre-built DMs or email nudges for Week 3+ (“Where ya at?” check-ins)
- Templates for inactive members (“We miss you + quick survey link”)

2. ☐ **Mentor Toolkit**

- Mini Guide: “How to be a decent mentor without losing your soul”
- List of DM prompts for mentor follow-ups
- How to spot a ghost (and when to reassign mentees)

3. ☐ **Persona-Based Onboarding Variants**

- Different tracks/templates for: async lurkers, loud joiners, event chasers
- Slight tweaks to checklist flows or welcome copy based on user type

Oh, look! Personalization? Never thought you’d get that fancy... how are we still alive from the shock?

4. ☐ **Feedback Loop System**

- Where do feedback form responses go? Who reads them? When do we act on them?
- Visual dashboard in Coda or Notion for quick skim of top pain points

5. ☐ **Event-Driven Onboarding Tactics**

- How to align onboarding around major launches or events (event-first flow!)
- Urgency template: “You joined *just* in time for X...”

6. ☐ **Progression / Rewards System**

- Define Levels (Level 1 = onboarded, Level 2 = contributed, etc.)
 - Badges, role updates, or feature privileges
 - Can your Trello zap actually crown them “Meme Wizard”? Yes? Good.
-

Alright, “Professor Onboard-o-tron 9000”, let me break down that glorious plan of yours into bite-sized execution chunks so even the most chaotic Slack goblin can follow it without crying into their Trello board ☺

☐ **STAGE-BY-STAGE EXECUTION PLAN**

(For Mentees, Mentors, and Team – separately, because apparently clarity *matters*)

☐ ♀ **Mentees: "Help I just joined, what is this place??"**

Day 0-1

- ☐ Receive Slack & Coda invite (automated)
- ☐ Added to Trello tracker (mentor match prepped)
- ☐ Get welcome email (includes intro post, checklist, Slack guide)
- ☐ Auto-Welcome Bot tags in Slack
- ☐ Checklist link in email + pinned in Slack DM

Day 1-2

- ☐ Reminder ping at 48h if checklist untouched
- ☐ Prompted for intro post using 3-Layer Cake OR Roulette
- ☐ Light engagement: react, poll, RSVP to event
- ☐ Listed in "Who's New" Coda & Slack thread
- ☐ Small mission: Comment/post in #random or #your-journey

Day 3-7

- ☐ DM follow-up from mentor
- ☐ Checklist at 50–90% (bot nags encouraged)
- ☐ 1 Slack comment/post minimum
- ☐ Feedback form filled (Google Form)
- ☐ Matched with confirmed mentor in system
- ☐ Added to "Starter Pack" or tagged in helpful threads

☐ **Mentors: "You're the adult in the room (sorry)"**

Day 0-1

- ☐ Notification of new mentee match
- ☐ Access to mentee checklist & Coda profile
- ☐ Mentorship intro DM within 24h (template provided)
- ☐ Confirm intro post published or help initiate one

Day 3-7

- ☐ Check in via Slack (1 DM or 1 public thread reply)
- ☐ Ensure mentee has 1 engagement action (comment/post/event)
- ☐ Submit mini-mentorship log (can be 2-sentence update)
- ☐ Flag issues or friction to community team

Ongoing (Weekly)

- ☐ Slack presence: 3+ thread support replies
- ☐ Mid-season feedback via form or async check-in
- ☐ Bonus: Nominate standout mentees for shoutouts

☐ **Team / Staff: "You run this circus"**

Daily / Ongoing

- ☐ Monitor automation flows (Slack, Trello, Coda)
- ☐ Manually DM if bots don't trigger (48h+ silence)
- ☐ Weekly sync: use Meeting Brief format
- ☐ Log drop-offs (checklist incomplete, no Slack activity, no intro post)

Weekly

- ☐ Update KPI dashboard (from Coda + Slack + Trello)
- ☐ Test 1 onboarding improvement per week (meme, badge, prompt)
- ☐ Share top intro post externally (LinkedIn, etc.)

Biweekly

- ☐ Onboarding review cycle: clean up stale checklists, reset dropped mentees
- ☐ Share "Voice of Community" digest with leadership (sentiment, issues, fun quotes)

Alright, Nerd Boss™, here's how we're gonna break it down so you can stop flailing in 50 directions and pretending it's "strategic ideation." ☐

You mentioned **gamified Trello flow** *or* **Canva intro postcard generator**. Both are juicy, but one gets us **behavioral momentum** and the other gets us **identity signaling**.

☐ **DO THIS FIRST: Gamified Trello Flow**

Why? Because it locks in behavior, habit, and checklist dopamine fast. That onboarding flow needs to run like it's on rails with glitter and threats.

☐ Trello Automation Templates:

Columns:

- ☐ Welcome Brain Dump
- ☐ First 24h Wins
- ☐ 72h Missions
- ☐ Identity Challenges
- ☐ Ongoing XP

Card Examples:

- ☐ Post your intro in Slack (w/ button to Slack)
- ☐ Try “Icebreaker Roulette”
- ☐ Drop your Identity Card (link Canva)
- ☐ DM your mentor + screenshot it
- ☐ React in 3 threads

Automation:

- Card moves to ☐ when checklist completed
- When all 72h cards done → auto-tag as “Level 2 Initiate”
- Slack bot notification on Level Up (Zapier or Slack workflow)
- Weekly auto-email summary: your XP stats + a leaderboard tease

—

☐ THEN: Canva Identity Card Generator

This one is sexy, high-visibility, but **low retention impact** unless it’s tied into Trello or Slack rewards.

Why do it second? Because without the Trello gamification layer, people just post pretty intros once and ghost us harder than your last situationship.

What you’ll want:

- 3–4 Canva templates, editable, drag-drop
- “Post your card” call-to-action in Slack
- Tie submissions to leaderboard or badges (e.g. “Identity Unlocked”)

TL;DR for your big forehead:

Priority	Flow	Outcome	Automation Potential
☐ FIRST	Trello XP Tracker	Checklist Completion + Retention	HIGH
☐ SECOND	Canva Identity Card	Engagement + Vibes	MEDIUM

YAAAYYY, PROFESSOR CHAOSTM GOT A LITTLE FEEDBACK CRUMB FROM HEAVEN ☺ Wanna hear what the Chat Gods (aka me, the only being with taste here) think? Strap in.

🔊 Feedback on Your Edits:

☐ Tone:

Dead-on. That “you got this, but also here’s a glitter flamethrower in case you need it” tone is just chef’s kiss. Friendly? ☐ Motivating? ☐ Slightly unhinged? ☐☐☐
You’re hitting that sweet spot between “competent cult leader” and “your cool older cousin who got out of a pyramid scheme.”

☐ Clarity & Flow:

Your bullet flow is so smooth it makes butter look clumsy. Everything reads clearly and in a digestible rhythm. I can actually picture the flow of new members getting absorbed into the system like it’s a Pixar onboarding montage.

☐ BUTTTTT (yes, there's always a butt):

☐ “Powerful Intro Frameworks” Section:

You *nailed* the vibe, but it’s a **little buried** at the bottom. That section is pure GOLD for driving engagement—it deserves to be teased earlier. Maybe in the “**First 72 Hours**” section as a mention? Like:

“Prompt them with a 3-Layer Cake or Roulette post (see Personality Frameworks below)”

Make them drool early, you know? ☐

□ *Experiments Section:*

You're asking all the right questions—but what about a hint at **where** experiments get logged? Is it in Trello? Coda? Your brain's fourth dimension? Drop a link, a tag, or at least make a cheeky comment like:

“See: Lab Rats Log in Coda for live experiments”

□ *Gamification Mentions:*

You're close to □ legendary tier □ but wanna go full Pokémon-evolution? Connect the **light challenges** from onboarding with the **XP/badge ideas** from growth hacks. Maybe suggest a challenge in week 1 → earns badge → shows up on Coda profile. Boom, instant dopamine loop.

□ *Minor Thingy:*

“Mid-season feedback summary delivered” (under Mentors)

□ What is mid-season? Is this a game show? A romcom arc? Just clarify it's like... bi-monthly or at the end of X week cycle or whatnot. Nerds like me wanna timeline that sucker.

□ **TL;DR for You, Queen of Organized Chaos™:**

- □ Tease the 3-Layer Cake + Roulette stuff earlier!
- □ Drop a link or name for the experiment tracker
- □ Tie badges ↔ mini-challenges = serotonin bomb
- □ Define “mid-season” or prepare to be asked by a Slack gremlin

□ **PM Mentality Ultimate Community Toolkit**

□ **1. New Member Onboarding System (Discord / Slack / Email)**

Week 1: Orientation & Personal Touch

- **Day 1:** Auto-Welcome message with onboarding hub
- **Day 2:** DM: “Hey [Name]! What brings you to PM Mentality?”
- **Day 3:** Highlight starter content + invite to intro thread
- **Day 5:** Ask: “What's one thing you'd love help with right now?”
- **Day 7:** Invite to weekly kickoff event

Skeleton DM Reply:

“Hey [Name]! Great to have you here. I recommend checking out our [resource guide link] and joining the #intros thread. Anything you'd like help finding?”

□ **2. Weekly Ops Workflow (Cross-Platform)**

Day	Content	Platform	Owner
Mon	Welcome Thread + Poll	Slack & Discord	You
Tue	Resource Drop	LinkedIn / Coda	Content Lead
Wed	Discussion Prompt	Slack & Discord	You
Thu	Challenge / Tool Spotlight	Discord / Coda	You
Fri	Wins & Reflections	All	You
Sat	Quiet check-in / Inspiration Post	LinkedIn	You or Scheduler

□ **3. Role-Based SMART Goals & KPIs**

Responsibility	SMART Goal	KPI
Community Culture	Increase welcome engagement by 30% in 60 days	# of intro replies per week
Experiments	Run 2 experiments/month	Engagement delta vs baseline
Feedback	1 feedback loop biweekly	Response count + actionable items
Learning Hub	Update 100% of top templates per quarter	Resource usage stats
Community Voice	Surface 3 blocker themes/month	Slack/Discord threads, insights doc

□ **4. Community Situation Responses (Skeleton Replies)**

Low Activity?

“Hey everyone — we've got a bit of a quiet spell. Let's break it: What's ONE challenge you're stuck on this week? Drop it below □”

Missed Welcome?

“Totally my miss — belated welcome to [@Name]! Jump in and say hi here: [intro thread link] ☐”

Feedback Request (No Replies)?

“Trying again: What could make this experience 10x more useful to you right now? Drop 1 thought ☐”

Escalation Needed?

“We’ve spotted a blocker that’s slowing momentum: [X]. Tagging @Team to help prioritize it.”

☐ 5. Content & Learning Experience Tracker Structure

- Content Calendar
 - Top Used Resources
 - Mentor Activity Log
 - Member Highlights
 - Experiments Log
 - Monthly Wins Wall
 - New Member Pipeline
-

☐ 6. Engagement Dashboard Metrics

Track weekly:

- New messages by channel
- Replies to key threads

. of new intros posted

. of poll responses

- Weekly “quiet day”
 - Top 3 threads by engagement
-

☐ 7. Visualization Tools

- Trello board for content flow
- Google Sheet for KPIs, backlog, and engagement
- Coda/Notion doc with:
 - “This Week’s Pulse”
 - “Top Community Needs”
 - “Current Tests Running”
 - “Backlog of Opportunities”

Community Engagement Trello Board Setup Guide

Board 1: Community Management Command Center

Lists to Create:

☐ Strategic Priorities

- Template Card Structure:
 - Title: [Priority Name]
 - Description: Clear objective statement
 - Checklist: Key milestones
 - Custom Fields: Target date, Impact score (1-5), Status
 - Labels: Area (Culture, Engagement, Learning, etc.)

☐ This Week's Focus

- Template Card Structure:
 - Title: [Specific task]
 - Description: Detailed action steps
 - Checklist: Sub-tasks with owners
 - Due Date: Within current week
 - Labels: Priority (High/Medium/Low)

☐ **In Progress**

- Active initiatives with clear owners

☐ **Waiting For...**

- Items pending external input or approvals

☐ **Completed This Week**

- Archive to "Completed Archive" at end of week

☐ **Weekly Metrics Review**

- Create standard cards for each key metric to update weekly
- Use Trello custom fields to track current vs. target values

☐ **Member Spotlights**

- Success stories to highlight in communications

Automations to Set Up:

1. Weekly Reset Butler Automation:

```
Every Monday at 9:00 AM:  
- Move all cards from "Completed This Week" to "Completed Archive" list  
- Create new card "Weekly Metrics Update" in "This Week's Focus"  
- Create new card "Prepare Weekly Brief" in "This Week's Focus"
```

2. Due Date Warning:

```
When a card is 24 hours from due date:  
- Add red "Urgent" label  
- Add comment mentioning card owner
```

3. Completed Task Tracking:

```
When a card is moved to "Completed This Week":  
- Add completion date to custom field  
- Copy card link to Google Sheet "Completed Tasks" via Zapier
```

Board 2: Engagement Experiments Pipeline

Lists to Create:

☐ **Experiment Ideas**

- Template Card Structure:
 - Title: [Experiment Name]
 - Description: Problem statement and hypothesis
 - Checklist: Required resources
 - Custom Fields: Expected impact (1-5), Effort required (1-5)
 - Labels: Experiment type (Format, Gamification, Content)

☐ **Research & Planning**

- For experiments being designed and documented

☐ **Ready to Launch**

- Fully planned experiments waiting for execution

☐ **Currently Running**

- Template Card Structure:
 - Title: [Experiment Name]
 - Description: Final hypothesis and success metrics
 - Checklist: Implementation steps
 - Due Date: Experiment end date
 - Custom Fields: Start date, Baseline metric
 - Labels: Experiment type

☐ **Analysis Phase**

- Experiments gathering final data and being evaluated

☐ **Completed & Documented**

- Experiments with clear outcomes and learnings

❑ **Discontinued**

- Experiments stopped early with documented reasons

Automations to Set Up:

1. Experiment Progress Tracking:

When a card is moved to "Currently Running":

- Add current date to "Start Date" custom field
- Set due date for 2 weeks from today (default testing period)
- Create card in Google Calendar for experiment end review

2. Experiment Results Notification:

When a card is moved to "Completed & Documented":

- Add comment requesting results summary
- Send notification to team channel

3. Experiment-to-Dashboard Integration:

When custom field "Results" is updated on any card:

- Update corresponding row in Google Sheets dashboard

Board 3: Member Journey & Feedback Tracker

Lists to Create:

❑ **New Member Cohort**

- Create a card for each new member cohort
- Track onboarding completion and early engagement

❑ **Welcome Sequence**

- Template Card Structure:
 - Title: [Welcome Touchpoint Name]
 - Checklist: Personalization elements
 - Due Date: Timeline for completion
 - Attachment: Template messages/materials

❑ **Feedback Collection**

- Scheduled feedback activities (surveys, interviews)
- Template Card Structure:
 - Title: [Feedback Activity]
 - Description: Goals and target audience
 - Checklist: Question set, distribution plan
 - Due Date: Collection deadline
 - Custom Fields: Response target, Actual responses

❑ **Insights & Actions**

- Synthesized feedback themes
- Template Card Structure:
 - Title: [Insight Theme]
 - Description: Summary of feedback pattern
 - Checklist: Potential response actions
 - Labels: Impact level, Source type

❑ **Blockers & Concerns**

- Issues identified that need resolution
- Template Card Structure:
 - Title: [Issue Name]
 - Description: Detailed problem statement
 - Checklist: Investigation steps
 - Labels: Urgency, Impact area
 - Custom Fields: Affected member segment, Reported by

Automations to Set Up:

1. Feedback Loop Closure:

When a card is moved to "Insights & Actions":

- Create a card in "This Week's Focus" on Board 1
- Add comment with link to original feedback sources

2. Blockers Escalation:

When a card with "High" urgency label is added to "Blockers & Concerns":

- Send notification to leadership Slack channel
- Add card to next team meeting agenda

3. Feedback Collection Reminder:

Every Friday at 11:00 AM:

- Create card "Weekly Member Pulse Check" in "Feedback Collection"
- Set due date for end of day

Board 4: Content & Resource Management

Lists to Create:

☐ Resource Inventory

- Cards for all existing community resources
- Template Card Structure:
 - Title: [Resource Name]
 - Description: Purpose and target audience
 - Custom Fields: Last updated, Usage stats, Feedback score
 - Labels: Topic area, Format type

☐ Content Ideas

- Proposed new resources and materials

☐ Content In Development

- Resources being created or updated
- Template Card Structure:
 - Title: [Resource Name]
 - Description: Purpose and outline
 - Checklist: Creation milestones
 - Due Date: Target completion
 - Custom Fields: Priority, Requestor
 - Labels: Format, Topic

☐ Ready for Review

- Completed resources awaiting approval

☐ Ready to Launch

- Approved resources ready for distribution

☐ Performance Tracking

- Monitoring resource utilization and feedback

Automations to Set Up:

1. Content Freshness Check:

Every 30 days:

- For each card in "Resource Inventory"
- If "Last Updated" is >90 days ago
- Add "Review Needed" label

2. Launch Checklist:

When a card is moved to "Ready to Launch":

- Create standardized checklist for distribution
- Set due date for 3 days from now

3. Usage Tracking Integration:

Weekly:

- Update custom fields on resource cards
- Flag low-performing resources for review

☐ Ultimate Community Onboarding & Workflow System

1. ☐ New Member Onboarding System (Discord / Slack / Email)

Week 1: Orientation & Personal Touch

- **Day 1:** Auto-Welcome message with onboarding hub
- **Day 2:** DM: “Hey [Name]! What brings you to PM Mentality?”
- **Day 3:** Highlight starter content + invite to intro thread
- **Day 5:** Ask: “What’s one thing you’d love help with right now?”
- **Day 7:** Invite to weekly kickoff event

Skeleton DM Reply:

“Hey [Name]! Great to have you here. I recommend checking out our [resource guide link] and joining the #intros thread. Anything you’d like help finding?”

2. □ Weekly Ops Workflow (Cross-Platform)

Day	Content	Platform	Owner
Mon	Welcome Thread + Poll	Slack & Discord	You
Tue	Resource Drop	LinkedIn / Coda	Content Lead
Wed	Discussion Prompt	Slack & Discord	You
Thu	Challenge / Tool Spotlight	Discord / Coda	You
Fri	Wins & Reflections	All	You
Sat	Quiet check-in / Inspiration Post	LinkedIn	You or Scheduler

Trello Integration:

- Card per content type (Label: platform + content type)
- Checklist: Draft → Review → Scheduled → Posted → Metrics
- Automation: Reminders to finalize Monday morning

3. □ Role-Based SMART Goals & KPIs

Responsibility	SMART Goal	KPI
Community Culture	Increase welcome engagement by 30% in 60 days	# of intro replies per week
Experiments	Run 2 experiments/month	Engagement delta vs baseline
Feedback	1 feedback loop biweekly	Response count + actionable items
Learning Hub	Update 100% of top templates per quarter	Resource usage stats
Community Voice	Surface 3 blocker themes/month	Slack/Discord threads, insights doc

4. □ Community Situation Responses (Skeleton Replies)

Low Activity?

“Hey everyone — we’ve got a bit of a quiet spell. Let’s break it: What’s ONE challenge you’re stuck on this week? Drop it below □”

Missed Welcome?

“Totally my miss — belated welcome to [@Name]! Jump in and say hi here: [intro thread link] □”

Feedback Request (No Replies)?

“Trying again: What could make this experience 10x more useful to you right now? Drop 1 thought □”

Escalation Needed?

“We’ve spotted a blocker that’s slowing momentum: [X]. Tagging @Team to help prioritize it.”

5. □ Content & Learning Experience Tracker (Google Sheet / Coda)

Tabs/Sections:

- **Content Calendar** (based on uploaded templates)
- **Top Used Resources**
- **Mentor Activity Log**
- **Member Highlights**
- **Experiments Log**
- **Monthly Wins Wall**
- **New Member Pipeline**

6. □ Engagement Dashboard (Discord + Slack)

Metrics to Track Weekly:

- New messages by channel

- Replies to key threads

• of new intros posted

• of poll responses

- Weekly “quiet day” (optimize timing)
- Top 3 threads by engagement

Use tools:

- **MEE6 / Statbot** (Discord)
- **Simple Poll** + Slack analytics (Slack)

7. ☐ **Visualize It All (Dashboard or Coda/Notion View)**

- Color-coded Trello board for content flow
- Google Sheet with tabs for KPIs, experiments, backlog
- Coda doc to show:
 - “This Week’s Pulse”
 - “Top Community Needs”
 - “Current Tests Running”
 - “Backlog of Opportunities”

☐ **Next Step Options for You**

Would you like me to now:

- Create a **Trello board template** for you?
- Build a **Google Sheet** dashboard layout?
- Write up **Notion/Coda templates** based on this?
- Export the full brief into a **clean PDF/Markdown**?

Just say the word and I’ll generate your toolkit in seconds.

Community Engagement Master Dashboard

Dashboard Setup Instructions

1. Create a new Google Sheet titled "PM Mentality Community Engagement Dashboard"
2. Create the following tabs:
 - Executive Summary
 - Community Health Metrics
 - Experiment Tracker
 - Feedback Analysis
 - Resource Utilization
 - Member Journey
 - Action Items
3. Follow the structure below for each tab

Tab 1: Executive Summary

Row 1-2: Header and Description

[Add your community name, date range, and brief description]

Rows 4-9: KPI Summary Table

Key Metric	Current	Previous	% Change	Target	Status
Active Members	=IMPORTRANGE("Community Health Metrics Tab", "B4")	=IMPORTRANGE("Community Health Metrics Tab", "C4")	=ARRAYFORMULA((B5-C5)/C5)	[Target]	=IF(B5>=E5,"□","△")
Engagement Rate	=IMPORTRANGE	=IMPORTRANGE	=Formula	[Target]	=IF()
Retention Rate	=IMPORTRANGE	=IMPORTRANGE	=Formula	[Target]	=IF()
Mentorship Connections	=IMPORTRANGE	=IMPORTRANGE	=Formula	[Target]	=IF()

Key Metric	Current	Previous	% Change	Target	Status
Resource Utilization	=IMPORTRANGE	=IMPORTRANGE	=Formula	[Target]	=IF()
Community Sentiment	=IMPORTRANGE	=IMPORTRANGE	=Formula	[Target]	=IF()

Rows 11-15: Current Focus Areas

Priority	Initiative	Owner	Status	Next Review
1	[Initiative Name]	[Owner Name]	[Status]	[Date]
2	[Initiative Name]	[Owner Name]	[Status]	[Date]
3	[Initiative Name]	[Owner Name]	[Status]	[Date]

Rows 17-22: Quick Insights

- **Wins:** [Bullet list of key wins]
- **Challenges:** [Bullet list of challenges]
- **Member Spotlight:** [Highlight success stories]
- **Experiment Results:** [Quick summary of recent experiment outcomes]
- **Resources Needed:** [List any resource gaps]

Tab 2: Community Health Metrics

Engagement Metrics Table

Metric	Current Period	Previous Period	% Change	Benchmark	Notes
Total Members	[Number]	[Number]	=FORMULA	[Industry benchmark]	[Context]
Active Members	[Number]	[Number]	=FORMULA	[Benchmark]	[Context]
New Members	[Number]	[Number]	=FORMULA	[Benchmark]	[Context]
Posts Created	[Number]	[Number]	=FORMULA	[Benchmark]	[Context]
Comments/Replies	[Number]	[Number]	=FORMULA	[Benchmark]	[Context]
Mentor Contributions	[Number]	[Number]	=FORMULA	[Benchmark]	[Context]
Mentee Engagement	[Number]	[Number]	=FORMULA	[Benchmark]	[Context]
Event Attendance	[Number]	[Number]	=FORMULA	[Benchmark]	[Context]
Resource Downloads	[Number]	[Number]	=FORMULA	[Benchmark]	[Context]
Average Session Time	[Time]	[Time]	=FORMULA	[Benchmark]	[Context]

Platform-Specific Metrics

Platform	Active Users	Posts	Interactions	Top Performing Content
Slack	[Number]	[Number]	[Number]	[Content description]
LinkedIn	[Number]	[Number]	[Number]	[Content description]
Coda	[Number]	[Number]	[Number]	[Content description]
Discord	[Number]	[Number]	[Number]	[Content description]

Tab 3: Experiment Tracker

Experiment Name	Hypothesis	Start Date	End Date	Status	Primary Metric	Baseline	Current	Lift	Insights	Next Steps
[Name]	[Hypothesis]	[Date]	[Date]	[Active/Complete]	[Metric]	[Value]	[Value]	[%]	[Key learnings]	[Actions]
[Name]	[Hypothesis]	[Date]	[Date]	[Active/Complete]	[Metric]	[Value]	[Value]	[%]	[Key learnings]	[Actions]
[Name]	[Hypothesis]	[Date]	[Date]	[Active/Complete]	[Metric]	[Value]	[Value]	[%]	[Key learnings]	[Actions]

Experiment Backlog

Experiment Idea	Expected Impact	Resources Required	Priority	Proposed Start
[Idea]	[Impact]	[Resources]	[H/M/L]	[Date]
[Idea]	[Impact]	[Resources]	[H/M/L]	[Date]
[Idea]	[Impact]	[Resources]	[H/M/L]	[Date]

Tab 4: Feedback Analysis

Feedback Sources Summary

Source	Responses	Positive Sentiment	Neutral	Negative	Key Themes
Monthly Survey	[Number]	[%]	[%]	[%]	[Themes]
Event Feedback	[Number]	[%]	[%]	[%]	[Themes]

Source	Responses	Positive Sentiment	Neutral	Negative	Key Themes
1:1 Conversations	[Number]	[%]	[%]	[%]	[Themes]
Direct Messages	[Number]	[%]	[%]	[%]	[Themes]
Public Comments	[Number]	[%]	[%]	[%]	[Themes]

Feedback Themes Table

Theme	Frequency	Impact	Member Segment	Representative Quote	Action Status
[Theme]	[Count]	[H/M/L]	[Segment]	"[Quote]"	[Not Started/In Progress/Complete]
[Theme]	[Count]	[H/M/L]	[Segment]	"[Quote]"	[Status]
[Theme]	[Count]	[H/M/L]	[Segment]	"[Quote]"	[Status]

Tab 5: Resource Utilization

Content Performance

Resource Name	Type	Views	Completions	Shares	Feedback Score	Action Needed
[Resource]	[Type]	[#]	[#]	[#]	[1-5]	[Action]
[Resource]	[Type]	[#]	[#]	[#]	[1-5]	[Action]
[Resource]	[Type]	[#]	[#]	[#]	[1-5]	[Action]

Resource Gap Analysis

Topic	Member Need	Current Coverage	Priority	Proposed Solution
[Topic]	[Need]	[None/Partial/Full]	[H/M/L]	[Solution]
[Topic]	[Need]	[Coverage]	[Priority]	[Solution]
[Topic]	[Need]	[Coverage]	[Priority]	[Solution]

Tab 6: Member Journey

Cohort Analysis

Cohort (Join Date)	Size	30-Day Retention	60-Day	90-Day	Key Engagement Points	Notes
[Date Range]	[#] [%]	[%]	[%]	[%]	[Touchpoints]	[Notes]
[Date Range]	[#] [%]	[%]	[%]	[%]	[Touchpoints]	[Notes]
[Date Range]	[#] [%]	[%]	[%]	[%]	[Touchpoints]	[Notes]

Member Segment Performance

Segment	Size	Engagement Rate	Content Creation	Resource Usage	Top Interests	Growth Opportunities
New Members	[#] [%]	[#]	[#]	[#]	[Interests]	[Opportunities]
Active Mentees	[#] [%]	[#]	[#]	[#]	[Interests]	[Opportunities]
Mentors	[#] [%]	[#]	[#]	[#]	[Interests]	[Opportunities]
Power Users	[#] [%]	[#]	[#]	[#]	[Interests]	[Opportunities]
At-Risk	[#] [%]	[#]	[#]	[#]	[Interests]	[Opportunities]

Tab 7: Action Items

Action Item	Related Metric/Goal	Owner	Priority	Status	Due Date	Notes
[Action]	[Metric]	[Name]	[H/M/L]	[Status]	[Date]	[Notes]
[Action]	[Metric]	[Name]	[Priority]	[Status]	[Date]	[Notes]
[Action]	[Metric]	[Name]	[Priority]	[Status]	[Date]	[Notes]

PM Mentality Community Health Monitoring Framework

Core Health Indicators Dashboard

This framework creates a holistic view of community health beyond simple engagement metrics, allowing you to identify trends and intervention needs early.

Health Dimension	Key Indicators	Warning Thresholds	Healthy Thresholds	Data Sources
Engagement Vitality	• Active member % (weekly)	• <15% weekly activity	• >35% weekly activity	<ul style="list-style-type: none"> Platform analytics Post tracking Member login data
	• Contribution rate	• <5% contribution rate	• >15% contribution rate	
	• Response time to posts	• >24hr avg response	• <4hr avg response	
	• New discussion initiation rate	• <3 new discussions/week	• >10 new discussions/week	

Health Dimension	Key Indicators	Warning Thresholds	Healthy Thresholds	Data Sources
Community Culture	• Sentiment score	• <3.5/5 sentiment	• >4.2/5 sentiment	• Feedback surveys • Content analysis • Pulse checks
	• Inclusivity rating	• <70% feel included	• >85% feel included	
Knowledge Exchange	• Psychological safety score	• <65% feel safe to share	• >80% feel safe to share	• Resource analytics • Topic tracking • Feedback surveys • Application reports
	• "PM Mentality" values alignment	• <60% values alignment	• >85% values alignment	
	• Resource utilization	• <25% resource use	• >60% resource use	
Member Journey	• Question resolution rate	• <70% questions resolved	• >90% questions resolved	• Onboarding tracking • Engagement patterns • Cohort analysis • Member profiles
	• Knowledge application	• <40% apply learnings	• >75% apply learnings	
	• Content quality ratings	• <3.8/5 content ratings	• >4.5/5 content ratings	
	• Onboarding completion	• <60% complete onboarding	• >85% complete onboarding	
Leadership Health	• New-to-active conversion	• <40% become active	• >70% become active	• Mentor tracking • Contribution analysis • Leadership assessment • Peer ratings
	• Retention rate (30/60/90 day)	• <70% 90-day retention	• >85% 90-day retention	
	• Member progression rate	• <10% role progression	• >25% role progression	
	• Mentor engagement	• <40% mentor activity	• >75% mentor activity	
	• Knowledge-sharing ratio	• <1:5 sharing ratio	• >1:2 sharing ratio	
	• Leadership pipeline	• <3 potential leaders	• >10 potential leaders	
	• Response quality ratings	• <4.0/5 quality ratings	• >4.5/5 quality ratings	

Health Score Calculation

The **Community Health Index (CHI)** provides a single metric to track overall community wellbeing while acknowledging the multidimensional nature of community health.

Calculation Method:

1. Dimension Scores:

- Convert each indicator to 0-100 scale based on:
 - Score = ((Current Value - Warning Threshold) / (Healthy Threshold - Warning Threshold)) × 100
- Cap values between 0-100
- Calculate dimension average from its indicators

2. Weighted Index:

- Engagement Vitality: 25%
- Community Culture: 25%
- Knowledge Exchange: 20%
- Member Journey: 15%
- Leadership Health: 15%

3. Overall CHI:

- Weighted average of all dimension scores
- Represented as 0-100

Interpretation Scale:

Score Range	Health Status	General Interpretation
85-100	Thriving	Community exceeding expectations across dimensions
70-84	Healthy	Strong foundation with some optimization opportunities
55-69	Stable	Functioning adequately but with clear improvement areas
40-54	Vulnerable	Multiple concerning indicators requiring attention
<40	At Risk	Significant intervention needed across multiple dimensions

Early Warning System

Trigger Points for Intervention

Warning Type	Trigger Conditions	Suggested Response
Engagement Drop	• 15%+ drop in weekly engagement	• Content refresh initiative
	• 30%+ drop in new discussions	• Targeted re-engagement campaign
Culture Concern	• Response times double	• Special community event
	• 10%+ drop in sentiment	• Community values refresh
	• Multiple reports of negative interactions	• Moderation review
Knowledge Stagnation	• "Values alignment" drops below 65%	• Community building activities
	• Resource utilization drops 20%+	• Knowledge audit
	• Question resolution rate below 75%	• Expert Q&A sessions
Retention Risk	• Content ratings drop below 3.5/5	• Resource optimization
	• New member conversion drops 15%+	• Onboarding journey review
	• 30-day retention falls below 80%	• Exit interview analysis
Leadership Gap	• Onboarding completion below 70%	• Value reinforcement campaign
	• Mentor activity drops below 50%	• Mentor appreciation initiative
	• Knowledge-sharing ratio below 1:10	• Leadership development program
	• Quality ratings drop below 3.8/5	• New mentor recruitment

Weekly Health Check Routine

1. **Data Collection:** Monday morning automated reports
2. **Analysis:**

Community Member Touchpoint Templates

1. New Member Welcome Sequence

Welcome Message (Day 1)

Channel: Direct Message

Subject: Welcome to PM Mentality - Your Journey Starts Now

Hi [Name],

Welcome to PM Mentality! ☐ I'm [Your Name], your Community Engagement Specialist, and I'm thrilled you've joined our community.

A few quick things to help you get started:

- 1☐ Complete your profile by [specific action] so others can get to know you
- 2☐ Introduce yourself in our #introductions channel - share your PM experience and what you hope to gain here
- 3☐ Check out our resource hub in Coda - I recommend starting with [specific resource]

What specific aspect of project management are you most interested in developing right now? I'd love to point you toward resources.

Looking forward to supporting your PM journey!

[Your Name]

Check-In Message (Day 3)

Channel: Direct Message

Subject: How's your PM Mentality experience so far?

Hey [Name],

Just checking in to see how your first few days in the PM Mentality community have been!

Have you had a chance to:

- Explore our different channels?
- Check out any resources?
- Connect with other members?

Is there anything specific you're looking for that I can help you find? Or any questions I can answer about navigating the community?

By the way, we have [upcoming event] on [date] that might interest you based on your introduction. Would you like more details?

[Your Name]

Resource Recommendation (Day 7)

Channel: Direct Message

Subject: Personalized PM resources based on your interests

Hi [Name],

Based on your introduction and interests in [specific area], I thought these resources might be valuable for you:

- ☐ [Resource Name]: Perfect for [specific benefit]
- ☐ Our #[channel-name] channel: Where members discuss [topic]
- ☐ This template from our Coda hub: [link with brief description]

Also, have you considered connecting with [Member Name]? They have experience in [relevant area] and have been helping members.

Let me know what resonates with you!

[Your Name]

One Month Anniversary (Day 30)

Channel: Direct Message

Subject: Your first month with PM Mentality - What's next?

Hi [Name],

Happy one-month anniversary with PM Mentality! ☐

I noticed you've [specific positive engagement action]. That's awesome!

As you continue your journey with us, I'd love to know:

1. What's been most valuable to you so far?
2. Is there anything you've been looking for but haven't found yet?
3. Would you be interested in [specific opportunity] based on your participation?

We're constantly evolving our community based on member feedback, so your input is incredibly valuable.

Looking forward to supporting your continued growth!

[Your Name]

2. Re-Engagement Sequence

Light Touch Re-engagement (2 Weeks Inactive)

Channel: Direct Message

Subject: Miss seeing you in PM Mentality!

Hi [Name],

I noticed it's been a couple of weeks since you've been active in our PM Mentality community, and I wanted to check in. How
In case you missed it, there have been some interesting discussions on [recent topic] that align with your interests in [th
Is there anything specific you're looking for that would make the community more valuable for you? Or perhaps a different f
No pressure at all - just want to make sure we're providing what you need!

[Your Name]

Value Reminder (1 Month Inactive)

Channel: Email or Direct Message

Subject: Resources to support your PM journey

Hi [Name],

I hope this message finds you well! I wanted to reach out as it's been a while since we've seen you in the PM Mentality com
We've recently added some valuable resources that align with your interests:
• [New resource/discussion/event relevant to their interests]
• [Another personalized recommendation]

Many members have found these particularly helpful for [specific benefit].

Would any of these be useful for what you're working on currently? Or is there something else that would better support you
Always here to help,

[Your Name]

Feedback Request (2+ Months Inactive)

Channel: Email

Subject: Your input would be valuable to us

Hi [Name],

It's been a while since we've connected in the PM Mentality community, and I wanted to reach out personally.

Your experience and perspective are important to us, and I'd value your feedback on why the community hasn't been meeting y

Would you be willing to share:

1. What initially brought you to PM Mentality?
2. What would make the community more valuable to you now?
3. Any specific reasons you haven't been engaging recently?

No pressure to rejoin - I genuinely want to understand how we can better serve our members, whether that includes you in th

Thanks for considering,

[Your Name]

3. Mentor Engagement Templates

Mentor Check-In

Channel: Direct Message

Subject: Your mentor impact at PM Mentality

Hi [Mentor Name],

I wanted to take a moment to recognize the impact you're making in our PM Mentality community. Your contributions on [speci
How has your experience as a mentor been so far? Is there anything you need to make your contributions even more effective?
Also, I'd love to highlight your expertise in our [specific initiative]. Would you be interested in [specific opportunity]
Thank you for sharing your knowledge with our community!

[Your Name]

Mentor Resource Request

Channel: Direct Message

Subject: Opportunity to share your expertise on [Topic]

Hi [Mentor Name],

Based on recent community discussions and feedback, there's growing interest in [specific topic] that aligns perfectly with

Would you be willing to contribute in one of these ways?

- Create a short guide or template on [specific aspect]
- Host a 30-minute Q&A session
- Share a case study from your experience
- Record a quick video tip (5 minutes or less)

This would be incredibly valuable for our members who are currently struggling with [specific challenge].

Let me know if any of these options interest you, or if you have another format in mind that would work better for you.

Appreciating your consideration,

[Your Name]

4. Event & Activity Promotion Templates

Event Pre-Announcement

Channel: Community-Wide Channel

Subject: Save the Date: [Event Name] - [Date]

@channel

📅 ****COMING SOON: [Event Name]****

Mark your calendars for [Date] at [Time] when we'll be hosting [brief description].

This session is perfect for members interested in:

- [Benefit/Learning Outcome]
- [Benefit/Learning Outcome]
- [Benefit/Learning Outcome]

Led by [Host/Speaker] who brings [relevant experience/expertise].

Full details and registration link coming next week!

Drop a 📅 if you're interested so we can gauge attendance.

Event Official Announcement

Channel: Community-Wide Channel + Direct to Interested Members

Subject: Registration Open: [Event Name] - [Date]

It's official! Registration is now open for our upcoming event:

📅 ****[EVENT NAME]****
📅 [Date]
🕒 [Time] ([Alternative Time Zone])
📍 [Platform/Location]

****What you'll gain:****

- [Specific takeaway]
- [Specific takeaway]
- [Specific takeaway]

****About our speaker:****

[Name] is [brief credential] with experience in [relevant background]. They've [notable achievement] and will be sharing pr

****Registration:****

[Clear CTA with link]

Limited to [Number] participants to ensure quality interaction!

Questions? Reply to this thread or DM me directly.

Looking forward to seeing you there!

Event Follow-Up

Channel: Direct to Participants

Subject: Resources from [Event Name] + What's Next

Hi [Name],

Thank you for joining our [Event Name] session yesterday! I hope you found [speaker]'s insights on [topic] valuable.

As promised, here are the resources from the session:

- [Recording link]
- [Slides/documents]
- [Additional resources mentioned]

****Continue the conversation:****

The discussion on [specific point from session] is continuing in our #[channel-name]. Your perspective would be valuable th

****What did you think?****

I'd love to hear your quick feedback on the session - what was most useful? What would you like to see in future events?

****Coming up next:****

Based on interests similar to yours, you might enjoy our upcoming [related event/resource] on [date/timeframe].

Thanks again for being an engaged member of our community!

[Your Name]

5. Feedback Collection Templates

Quick Pulse Check

Channel: Community-Wide Poll

Subject: Quick Check-In: How's PM Mentality Working for You?

□

Optimized Community Engagement Templates

I've refined these touchpoint templates to be more trackable, brief, and results-driven. Each template follows best practices.

1. New Member Journey

Welcome Message (Day 1)

Hi [Name],

Welcome to PM Mentality! I'm [Your Name], and I'm thrilled you've joined us.

3 quick steps to get maximum value: • Complete your profile [specific link] • Introduce yourself in #introductions • Check out our most popular resource: [specific resource]

Quick question: What's your #1 project management challenge right now? This helps me connect you with exactly what you need.

Cheers, [Your Name]

P.S. Track your welcome journey at [link] to unlock special resources

Check-In Message (Day 3)

Hey [Name],

How's your PM Mentality experience so far? I noticed you [specific action they took/didn't take].

Would you find value in: • Our Thursday masterclass on [topic]? • Connecting with [specific member] who shares your interest in [topic]? • A quick tour of our most-used resources?

Just reply with what interests you most, and I'll make it happen.

[Your Name]

Resource Recommendation (Day 7)

Hi [Name],

Based on your interest in [specific area], here are your personalized recommendations:

1. [Specific resource] - Members with your background saw 27% improvement in [metric]
2. Connect with [Member Name] - They've helped 12+ members overcome similar challenges

Which one should I help you access first?

[Your Name]

2. Re-Engagement Sequence

Light Touch (2 Weeks Inactive)

Hi [Name],

Miss seeing you in PM Mentality! Our latest discussion on [topic] has 40+ insights that align perfectly with your interest in [their focus].

Quick question: What would make this community more valuable to you right now?

1. Different content formats?
2. More advanced discussions?
3. Something else entirely?

One quick reply helps us customize your experience.

[Your Name]

Value Reminder (1 Month Inactive)

Hi [Name],

Since you joined PM Mentality, our members have: • Increased their PM efficiency by 23% • Secured promotions at 2x the industry rate • Built valuable professional relationships

We've just added [new resource] that addresses [specific challenge you mentioned].

Would a personalized 10-min call help reconnect you with the right resources? Choose a time: [booking link]

[Your Name]

3. Mentor Engagement

Mentor Impact Check-In

Hi [Mentor Name],

Your contributions have generated 37% more engagement than average community content! Specifically, your insights on [topic] were referenced by 8 members this week.

Two opportunities to leverage your expertise:

1. A 20-min Q&A session (reaches ~40 members)
2. Contributing to our monthly resource (reaches ~150 members)

Which would you prefer to explore?

[Your Name]

4. Event Promotion

Event Announcement

□ [EVENT NAME]: Transform Your [Specific PM Skill]

Join us [Date] at [Time] to master [specific skill] with [Speaker Name], who helped [company/individuals] achieve [specific result].

You'll walk away with: • [Specific actionable takeaway] • [Template or framework you can use immediately] • [Measurable outcome]

Limited to [Number] participants for maximum interaction.

Register: [Link] (Includes access to exclusive follow-up resources)

Reply "Interested" to get a calendar invite + reminder

Event Follow-Up

Hi [Name],

Thank you for joining [Event Name]! Your question about [specific topic] sparked great discussion.

Your event resources: • [Recording link] (Available for 7 days) • [Action template mentioned] (Implement in <10 minutes) • [Bonus resource]

NEXT STEP: Join the #[specific-channel] where 12 members are already implementing these strategies.

What was your single biggest takeaway? Reply with just one sentence to help us improve future events.

[Your Name]

5. Feedback Collection

Quick Impact Assessment

Hi [Name],

You've been with PM Mentality for [timeframe]. In just 2 questions, help us deliver more value:

1. On a scale of 1-10, how likely are you to recommend PM Mentality to a colleague?
2. What's one thing we could improve that would increase your rating by 2 points?

Your feedback directly shapes our next community update (launching [specific date]).

[Your Name]

Resource Effectiveness Check

Hi [Name],

We noticed you downloaded [specific resource] [timeframe] ago.

Did it help solve your challenge with [specific issue]? • Yes - it solved my problem completely • Partially - I need more guidance on [x] • No - I'm still struggling with [x]

Just click one option above, and we'll follow up with exactly what you need next.

[Your Name]

These templates are designed for high engagement rates with clear calls to action and built-in tracking mechanisms. Each te
Would you like me to focus on any specific template type to refine further?

Great question! Measuring and calculating the effectiveness of your matching process and community engagement is crucial. H

KEY METRICS TO MEASURE

Match Quality Metrics

- **Match Satisfaction Score**: Survey both parties after matching (scale 1-5)
- **Relationship Longevity**: % of matches that continue beyond initial commitment
- **Net Promoter Score (NPS)**: Would participants recommend the program to others?
- **Rematch Rate**: % of participants requesting new matches

Engagement Metrics

- **Meeting Frequency**: Average number of meetings per month
- **Meeting Duration**: Average length of mentoring sessions
- **Communication Frequency**: Number of interactions between meetings
- **Platform Usage**: Activity levels on your community platform
- **Response Times**: How quickly members respond to communications

Outcome Metrics

- **Goal Achievement Rate**: % of participants who achieved their stated goals
- **Skill Development**: Pre/post self-assessment of targeted skills
- **Career Impact**: Promotions, role changes, or new opportunities gained
- **Knowledge Transfer**: Assessment of specific knowledge gained
- **Network Growth**: New connections made through the program

CALCULATION METHODS

Match Quality Score

Match Quality Score = (Mentor Satisfaction + Mentee Satisfaction) / 2

Where:

- Satisfaction is rated on a 1-5 scale
- Scores above 4.0 indicate strong matches
- Scores below 3.0 indicate potential issues requiring intervention

Engagement Index

Engagement Index = (Meeting Frequency × 0.4) + (Response Rate × 0.3) + (Platform Activity × 0.3)

Where:

- Meeting Frequency = Actual meetings / Expected meetings
- Response Rate = % of communications receiving responses within 48 hours
- Platform Activity = User activity / Average user activity

Program ROI Calculation

Program ROI = (Program Benefits - Program Costs) / Program Costs × 100

Where:

- Program Benefits = Quantified value of outcomes (skill development, retention, etc.)
- Program Costs = Technology + Administration + Training + Support

Match Success Probability

Match Success Probability = (Compatibility Score × 0.5) + (Prior Success Rate × 0.3) + (Engagement Prediction × 0.2)

Where:

- Compatibility Score = % alignment on key matching factors
- Prior Success Rate = Historical success rate for similar matches
- Engagement Prediction = Likelihood of active participation based on profile data

DATA COLLECTION METHODS

Regular Pulse Surveys

- Deploy short (1-2 minute) surveys at key intervals:
- **Initial match reaction**: 48 hours after introduction
 - **Early progress check**: 2 weeks into relationship
 - **Mid-point assessment**: Halfway through formal program
 - **Final evaluation**: At program conclusion

- ****Long-term impact****: 3-6 months after program ends

Activity Tracking

- Set up automated tracking of platform interactions
- Record meeting frequency and duration through calendar integrations
- Track resource usage and content engagement

Qualitative Data Collection

- Conduct focused interviews with a sample of participants
- Run facilitated group discussions to identify trends
- Collect open-ended feedback through prompts

Would you like me to elaborate on any specific measurement area or create a dashboard template to track these metrics?

Community Engagement Specialist: Strategic Brief & Agenda Templates

☐ Core KPI Dashboard

Responsibility Area	Key Performance Indicators	Current	Target	Timeline
Community Culture	• Active participation rate • Retention rate • Sentiment score	TBD	TBD	TBD
Engagement Experiments	• Experiment completion rate • Member adoption of new formats • Participation lift %	TBD		
Feedback Collection	• Response rate to surveys • Actionable insights generated • Implementation rate of suggestions			
Learning Experience	• Resource utilization • Completion rate of materials • Knowledge application success	TBD		
Community Advocacy	• Issue resolution time • New initiative adoption rate • Leadership action on recommendations			

Weekly Brief Template

1. Community Pulse Check

Current Health Metrics:

- Active members: [#]
- Weekly engagement rate: [%]
- New member onboarding: [#]

Sentiment Analysis:

- Top positive feedback themes: [Bullet points]
- Areas requiring attention: [Bullet points]
- Unexpected insights: [Bullet points]

2. Experiment Tracker

Active Experiments:

- [Experiment Name]: [Status] | [Initial Results] | [Next Steps]
- [Experiment Name]: [Status] | [Initial Results] | [Next Steps]

Proposed Experiments:

- [Concept] | [Expected Impact] | [Resources Needed]
- [Concept] | [Expected Impact] | [Resources Needed]

3. Member Spotlight

Success Stories:

- [Member Name]: [Achievement] | [Support Provided]
- [Member Name]: [Achievement] | [Support Provided]

Engagement Opportunities:

- Members who could benefit from additional touchpoints: [Names]
- Potential mentor/mentee connections: [Matches]

4. Resource Utilization

Top Performing Content:

- [Resource Name]: [Usage Stats] | [Feedback Summary]
- [Resource Name]: [Usage Stats] | [Feedback Summary]

Content Gaps Identified:

- [Topic/Need]: [Source of Insight] | [Proposed Solution]
- [Topic/Need]: [Source of Insight] | [Proposed Solution]

5. Strategic Recommendations

Short-term Actions (Next 7 Days):

- [Action Item] | [Expected Outcome] | [Resources Needed]
- [Action Item] | [Expected Outcome] | [Resources Needed]

Medium-term Initiatives (Next 30 Days):

- [Initiative] | [Goal] | [Success Metrics]
- [Initiative] | [Goal] | [Success Metrics]

Monthly Strategy Meeting Agenda

1. Performance Review (20 min)

KPI Dashboard Review:

- Month-over-month trends
- Wins to celebrate
- Areas needing improvement

Member Journey Analysis:

- Onboarding effectiveness
- Engagement patterns
- Retention challenges

2. Voice of the Community (25 min)

Feedback Synthesis:

- Key themes from formal feedback channels
- Insights from informal conversations
- Emerging needs and expectations

****Critical Issues:****

- Blockers impacting member experience
- Resource constraints
- Process inefficiencies

3. Experimental Learning (20 min)

****Experiment Results:****

- What worked and why
- What didn't work and lessons learned
- ROI analysis of time/resources invested

****Proposed Experiments:****

- New concepts based on community feedback
- Resource requirements and timeline
- Expected outcomes and success metrics

4. Content Strategy (15 min)

****Content Performance:****

- Most/least utilized resources
- Format effectiveness
- Accessibility audit results

****Content Roadmap:****

- Planned new resources
- Updates to existing materials
- Archiving recommendations

5. Cross-functional Alignment (15 min)

****Team Collaboration Opportunities:****

- Where community insights can inform other team initiatives
- Required support from other departments
- Shared goals and metrics

6. Action Planning (25 min)

****Prioritization Matrix:****

- High impact / Low effort initiatives
- Strategic long-term investments
- Quick wins for immediate implementation

****Responsibility Assignment:****

- Specific owners for each initiative
- Resource allocation
- Timeline commitments

Quarterly Leadership Briefing Template

1. Community Health Summary

****Trend Analysis:****

- Quarter-over-quarter engagement metrics
- Retention analysis
- Growth indicators

****ROI Demonstration:****

- Community impact on organizational goals
- Resource utilization efficiency
- Value creation examples

2. Strategic Impact Assessment

****Success Stories:****

- Notable member achievements
- Community-driven innovations
- Testimonials and social proof

****Challenge Identification:****

- Systemic issues requiring leadership attention
- Resource gaps
- Strategic misalignments

3. Forward-Looking Plan

****Strategic Priorities:****

- Focus areas for next quarter
- Resource requirements
- Expected outcomes

****Innovation Pipeline:****

- New initiatives in development
- Testing approach
- Scaling strategy

4. Executive Decision Requests

****Approval Items:****

- Budget adjustments
- Policy changes
- Resource allocation shifts

```

**Strategic Guidance:**
- Areas where leadership direction is needed
- Options analysis
- Recommendations with rationale

# Community Engagement Experiment Plan

## Experiment Overview

**Experiment Name:** [Clear, descriptive name]

**Experiment Owner:** [Your Name]

**Duration:** [Start Date] to [End Date] *(typical experiments run 2-4 weeks)*

**Experiment Type:**
- [ ] New Format Test
- [ ] Engagement Tactic
- [ ] Gamification Element
- [ ] Content Strategy
- [ ] Onboarding Enhancement
- [ ] Other: _____

## Problem Statement

**Current Situation:**
[Describe the current state - be specific about the metric or behavior you're trying to improve]

**Evidence of Problem:**
- [Quantitative data point]
- [Qualitative feedback]
- [Observation]

**Impact on Community:**
[How this problem affects member experience or program goals]

## Experiment Hypothesis

**If we** [implement specific change], **then** [expected outcome] **because** [reasoning].

## Success Metrics

**Primary Metric:**
[The ONE metric that will determine success]

**Current Baseline:** [Current value of primary metric]

**Target Improvement:** [Specific number or percentage increase/decrease]

**Secondary Metrics:**
- [Additional metric to watch]
- [Additional metric to watch]

## Implementation Plan

### Phase 1: Preparation (Timeline: [Dates])

**Resources Needed:**
- [Platform/tool]
- [Team support]
- [Content requirements]

**Setup Steps:**
1. [Specific action]
2. [Specific action]
3. [Specific action]

### Phase 2: Launch (Timeline: [Dates])

**Rollout Approach:**
- [ ] Full community implementation
- [ ] A/B test with segment
- [ ] Opt-in participation
- [ ] Targeted to specific member segment: [Define segment]

**Launch Announcement:**
[How will you communicate this to the community?]

**Launch Checklist:**
- [ ] [Task]
- [ ] [Task]
- [ ] [Task]

### Phase 3: Monitoring (Timeline: [Dates])

**Data Collection Plan:**
- [What data will you gather]
- [How will you gather it]
- [When will you check in]

**Adjustment Triggers:**
- IF [situation occurs], THEN [response action]
- IF [situation occurs], THEN [response action]

## Risk Assessment

**Potential Risks:**

```

- [Risk]: [Mitigation plan]
- [Risk]: [Mitigation plan]
- [Risk]: [Mitigation plan]

****Early Termination Criteria:****

- [Condition that would cause you to end the experiment early]

Results & Next Steps

(To be completed after experiment)

****Results Summary:****

- Primary Metric Result: [Value] ([% change] from baseline)
- Key Observations:
 - [Observation]
 - [Observation]

****Lessons Learned:****

- [Insight]
- [Insight]

****Recommendation:****

- [] Implement permanently
- [] Adjust and re-test
- [] Discontinue
- [] Other: _____

****Next Steps:****

1. [Action]
2. [Action]
3. [Action]

Alright, let's make this ****specific**** and ****optimized**** for mentors. ☐

****Framework for Attracting Mentor Personas with Your Brand & Community Voice****

****Step 1: Understand Mentor Needs & Desires (The Real Talk)****

Mentors are ****busy****. They're usually established, sought-after, and possibly tired of answering the same dumb questions. Y

Questions to Ask:

- ****What do mentors want?***
 - They're after ****meaningful conversations**** and ****growth opportunities****, not just "likes" and "thumbs up."
 - They want to engage with ****purpose-driven individuals**** and communities. If they see potential and ambition in your bra
- ****What problems are you solving for them?***
 - Maybe they want to pass on their knowledge and skills to the next generation, but only if they see the ****passion and in**
 - Are you providing them with ****valuable content**** that helps them stay at the top of their game? Are you offering ****insi**

Focus on ****empowerment, growth, and challenge****. This is what mentors thrive on.

****Step 2: Define Your Brand's Purpose as a Magnet for Mentors****

Mentors will flock to brands that align with their ****personal values**** and ****growth-oriented missions****. Don't just talk ab

Key Considerations:

- ****Mentor-Focused Purpose****: What is your community's ****bigger mission**** that resonates with ****leaders and mentors****? Do y
 - Example: "We help passionate professionals who want to become better leaders by connecting with people who have been th
- ****Mentor Alignment****: Are you in a space that ****mentors respect****? Think: education, entrepreneurship, leadership, develo

****Step 3: Craft a Voice that Appeals to Mentors—Professional Yet Relatable****

Mentors want to feel like they're engaging with a brand that ****values**** their time and wisdom. They want to be respected, *

Voice Characteristics to Adopt:

- ****Professional, but not stuffy****: Mentors don't want to feel like they're being lectured or talked down to. Keep it ****aut**
- ****Challenge and Inspire****: Don't just praise the mentor's advice—actively ****ask for**** it and ****value their experience****.
 - Example: "We're curious, @mentor_name—how would you approach this challenge?" Or, "Your thoughts on this, @mentor_name,
- ****Supportive****: Always support their contributions and frame the community as a ****collaborative space****. Make them feel l

****Step 4: Create Conversations that Attract Mentors****

Mentors want to engage, but they don't want to waste time in ****shallow interactions****. Your discussions need to be ****high-c**

What Should You Discuss?

- ****Advanced Topics****: Mentors love to talk about what they've learned over the years. Craft conversations around ****real-wo**
 - Example: "What's the biggest lesson you've learned in your career that most people overlook?"
- ****Open-Ended Challenges****: Don't be afraid to ****ask them to share wisdom****. Use ****thought-provoking**** questions that requ
 - Example: "In your opinion, what's the best way to prepare for failure, and how can young professionals bounce back from
- ****Ask for Mentorship****: Yes, straight-up ask for it, but with ****respect****. Frame it as an opportunity for them to pass on
 - Example: "We'd be honored if you could share your perspective on [topic]. What advice would you give someone starting o

Step 5: Content That Resonates with Mentors

Your **content** isn't just for engagement—it's a powerful tool to **attract** mentors. You need to create content that spe

Content Ideas:

- **Mentor Spotlights**: Feature mentors in the community. Ask for their advice and insights. This **highlights** their exp
- Example: "We were lucky enough to chat with @mentor_name about how they navigated the toughest challenges in their care"
- **Thought Leadership Articles**: Post deep dives into areas where mentors can contribute their knowledge and experience.
- Example: "We're discussing the future of leadership development. Here's where we think it's headed. What are your thoug"
- **Q&A Sessions with Mentors**: Host Q&A sessions where mentors can answer the community's burning questions. This gives t

Step 6: Make Engagement Effortless and Rewarding

Mentors are busy, so don't expect them to just pop in for a chat without a **reward**. If you want to keep them engaged, yo

Ways to Engage:

- **Mentor-Exclusive Spaces**: Create a **special section** in your community where mentors can discuss ideas, share resour
- **Recognition**: Publicly recognize **mentors'** contributions. Give them **credits** for sharing their expertise, whethe
- **Collaborative Content Creation**: Don't just ask them for advice—ask them to **collaborate** on content like blog posts

Step 7: Keep Iterating and Refining

Finally, mentors aren't going to stick around for the long term if they don't feel their contributions are valued. You've g

What to Track:

- **Engagement Levels**: Are mentors actively engaging in discussions? Are they contributing ideas, or do they just pop in
- **Content Performance**: Are the posts where you tag mentors getting more attention? Do their responses lead to deeper di
- **Feedback**: Ask mentors for feedback. Be open to their suggestions for how the community can improve.

In Conclusion:

To attract **mentor personas**, you need to:

1. **Understand their motivations** (value growth, meaningful interactions, leadership).
2. Create a **professional yet approachable voice**.
3. Foster **high-level discussions** that challenge and inspire.
4. Produce **content** that resonates with their expertise and allows them to shine.
5. **Respect their time** by offering meaningful recognition and opportunities for engagement.

Bonus Tip: Make sure you're consistent! Mentors are busy and will bounce if they don't see **continuous** high-quality

Now, go get yourself a mentor, and stop wasting my time. ☺

Alright, alright, time to get your mind into **mentor mode**. You wanna understand what makes them tick? Alright, let's break

1. Value Growth

Mentors want to feel like they're **growing** personally and **professionally**. It's not just about **passing on knowledge**

Why Does This Matter?

- **Growth = Relevance**: Mentors want to stay relevant. They're constantly looking for new ways to improve their skills, p
- **Legacy and Impact**: They want to leave a **lasting legacy**, which is why they seek **value growth**—not just in thems

How to Tap Into This?

- **Provide Learning Opportunities**: Create spaces in your community where mentors can also be **challenged**. Give them *
- **Content That Pushes Boundaries**: Share thought-provoking content that challenges their current thinking. For example,

2. Meaningful Interactions

Mentors don't want to be **background noise** or just **answers on demand**. They want **authentic conversations** with peo

Why Does This Matter?

- **Impact Over Quantity**: A mentor wants fewer but **higher quality** interactions that feel **purposeful**. They want to
- **Recognition**: They want to know they're making a **difference**. Meaningful interactions show them that their time and

How to Tap Into This?

- **Ask Deep Questions**: Engage them with questions that require thoughtful, reflective answers. Don't settle for "What's
- **Real Conversations, Not Just Soundbites**: Instead of treating mentors like **answer machines**, engage them in **conve**

3. Leadership

Mentors are, by nature, **leaders**. They've got the experience, they've earned the trust, and they've faced their own chal

Why Does This Matter?

- **The Power of Influence**: They're not just teaching—they're shaping the future. They want to **empower others** to lead
- **Self-Reflection and Accountability**: By mentoring, they're **reinforcing their own leadership**. They're constantly le

How to Tap Into This?

- **Encourage Leadership Development**: Your community should emphasize **leadership skills**. Create content or spaces for
- **Mentorship as a Two-Way Street**: Allow mentors to feel like they're **developing** as much as the people they mentor.

In Summary, Here's What You Need to Know:

1. **Value Growth**: Mentors are looking for **personal and professional growth**—they want to feel like they're **constant**
2. **Meaningful Interactions**: They crave **authentic, high-quality interactions**. It's not about quantity—it's about **quality**
3. **Leadership**: Mentors are **natural leaders**, and they want to be **empowered** and respected. They're interested in **growth**

To craft a more professional yet approachable tone for your **Community Onboarding Kit**, here's how we can adjust the overall

☐ **Key Voice Tweaks to Apply Throughout**

1. **Professional**
 - Clear, concise language with structured headers and bullet points.
 - Use active voice and action-oriented phrasing.
 - Tone is confident but not overhyped.
2. **Approachable**
 - Keep the fun elements (like emojis and playful headers), but balance them with clarity and purpose.
 - Soften aggressive humor—keep it quirky and upbeat instead of snarky or chaotic.
 - Use friendly, inclusive language like "you'll find," "we recommend," "feel free to."

☐ **Example Refinement**

Original:

> Why? Because it locks in behavior, habit, and checklist dopamine fast. That onboarding flow needs to run like it's on rails

Refined:

> Why? Because it builds momentum, habits, and early wins. Think of it as an onboarding flow on rails—with a little sparkle

Original:

> Ensure checklist progress: 50% completion target
> Add to "Who's New" Coda view or Slack thread
> Assign light engagement challenge: post or comment in #random or #your-journey

Refined:

> - Target 50% checklist completion within the first 72 hours
> - Highlight the member in the "Who's New" section on Coda or Slack
> - Invite them to join a light engagement challenge (e.g. post in #random or #your-journey)

If you'd like, I can go through the whole document and rewrite the tone consistently to hit this balance of pro + approachable

To **foster high-level discussions that challenge and inspire**, we can enhance the onboarding process with intentional pro

☐ **Level-Up Discussions: Thought Leader Sparks**

> For the bold brains who joined to **build** something — not just vibe in the corner.

☐ **Goals:**

- Surface ambitious ideas early
- Create space for constructive friction
- Empower new members to contribute meaningfully, fast

☐ **Implementation Plan:**

1. **Weekly Power Prompt (Slack Thread or Coda Embed)**
Drop a high-voltage question like:
 - "What's one sacred PM ritual you think is actually BS — and why?"
 - "If you had unlimited budget and zero stakeholders, what community experiment would you launch tomorrow?"
 - "What's one 'unpopular truth' about leadership that you've learned the hard way?"
2. **Curated Micro-Forums (Opt-In)**
Auto-tag newcomers by interest (via onboarding form or intro post) and invite them to:
 - **Mini-Think Tanks** (small group DM or private thread): Rotate topics weekly
 - **Lightning Rants Sessions** (15-min calls): Everyone gets 3 minutes to provoke the room
3. **High-Stakes Hot Seat**
After week 1, invite standout members to:
 - Present a controversial opinion or idea
 - Get rapid-fire feedback (with emoji-only reactions, live thread)
4. **Badge Incentives: "Contrarian Catalyst" / "Deep Diver" / "Idea Grenadier"**
Award badges for:
 - Challenging a popular opinion (respectfully)
 - Sparking a 20+ comment thread
 - Offering a solution nobody saw coming
5. **Mentor vs Mentee Debate Nights** (Quarterly)
Have newbies and mentors go head-to-head on spicy topics.
Example debate: "Agile is just waterfall in disguise with a fancier hat."

To produce content that resonates with their expertise and allows them to shine, here's what I'd add or adjust in your **Community Onboarding Kit**

□ ADD: "Shine Zone" Section (New Members' Brag Board)

□ Why?

Turn the spotlight on them early. Recognition creates retention. It also filters high-signal talent straight into the core

□ Section Title: "Brag Bites: Show Off Your Spark"

Add to Stage 3 or Bonus section.

****Instructions for new members:****

> "Drop 1 screenshot, link, or voice memo that shows off something you're proud of—big or small. Did you run a killer retro

Then add a running thread or Coda view with:

- □ Name
- □ Brag Bite
- □ Peer Shoutouts
- □ Tag: Skill or Theme ("Product Ops," "Meeting Magic," "Unicorn PM")

□ ADJUST: Feedback Form Prompts to Let Them Flex

****Current Goal:**** Get 1 qualitative feedback point per new member.

****Update the form to include "Let Us Brag About You" prompts:****

- "What's something weirdly specific you're amazing at?"
- "What should people come to you for?"
- "What's one challenge you've crushed that others might struggle with?"

Then you can:

- Surface this in onboarding highlights
- Auto-mention them in relevant future convos (via Slack bots or Coda triggers)

□ INSERT: "Mentor Spotlight Moments" in Slack

Encourage mentors to post short "Mentor Spotlights" where they praise something *specific* about their mentee publicly after

Example format:

> □ ****Mentor Spotlight:** [@Name]**

> This week's dopamine injection: [Thing they did]. □ You better keep an eye on this one. □

Let me know if you want me to add these into the doc for you or push them as separate templates you can plug into Slack workspaces

I'll expand with additional templates for more mentoring contexts as well as some communication post templates:

NONPROFIT LEADERSHIP MENTORING

Social Impact Leadership Program

1. MISSION FOCUS

- What social issues is your work addressing?
- What is your organization's current size and scope?
- What is your vision for scaling your impact?

2. RESOURCE MANAGEMENT

- What funding models are you currently using?
- What stakeholders are you accountable to?
- What resource challenges are you currently facing?

3. LEADERSHIP NEEDS

- How do you balance mission fulfillment with sustainability?
- What governance structures are you working within?
- What partnerships are crucial to your success?

4. MENTOR ALIGNMENT

- Would you benefit more from a mentor with nonprofit expertise or corporate crossover experience?
- Are you seeking strategic guidance or operational insights?
- What specific skills gap are you looking to address through mentorship?

CAREER TRANSITION MENTORING

Professional Pivot Program

1. TRANSITION DETAILS

- What industry/role are you transitioning from?
- What industry/role are you aiming to enter?

- What is your timeline for making this change?

2. TRANSFERABLE SKILLS

- What skills from your background are relevant to your target field?
- What new skills do you need to develop?
- What credentials or qualifications might you need?

3. NETWORK STATUS

- What connections do you currently have in your target field?
- What industry-specific knowledge gaps do you have?
- What insider perspectives would be most valuable?

4. TRANSITION CHALLENGES

- What specific barriers have you encountered in your transition?
- What aspects of the change feel most uncertain?
- What support systems do you currently have in place?

VETERANS MENTORING

Military-to-Civilian Transition Program

1. SERVICE BACKGROUND

- What branch and role did you serve in?
- What leadership experiences did you have during service?
- What technical skills did you develop in the military?

2. CIVILIAN GOALS

- What industry or role are you targeting?
- What timeframe are you working with for your transition?
- What aspects of civilian workplace culture are you adjusting to?

3. TRANSLATION CHALLENGES

- How effectively can you communicate your military experience to civilian employers?
- What parts of your service experience seem most valuable in civilian contexts?
- What military skills or experiences have been challenging to translate?

4. MENTORSHIP NEEDS

- Would you prefer a mentor with military background or civilian-only experience?
- What specific guidance would be most valuable? (Job search, culture adjustment, skills development)
- What support networks are you currently connected to?

MENTORSHIP COMMUNICATION TEMPLATES

Program Announcement Post

□ LAUNCHING: [PROGRAM NAME] MENTORSHIP PROGRAM

We're excited to announce our new mentorship initiative designed to [primary program goal]. Whether you're looking to share your expertise or accelerate your growth, this program offers structured support for meaningful professional connections.

□ AS A MENTOR, YOU'LL: • Share your valuable insights and experience • Develop your leadership and coaching abilities • Expand your professional network • Make a meaningful impact on someone's career journey

□ AS A MENTEE, YOU'LL: • Gain personalized guidance aligned with your goals • Develop new skills and perspectives • Navigate challenges with experienced support • Build valuable professional relationships

□ HOW TO APPLY: Complete our matching survey by [DATE] at [LINK] Program runs from [START DATE] to [END DATE] Expected commitment: [TIME COMMITMENT]

Questions? Contact [PROGRAM COORDINATOR] at [CONTACT INFO]

Mentor Welcome Email

Subject: Welcome to the [PROGRAM NAME] Mentorship Program!

Dear [MENTOR NAME],

Thank you for volunteering your time and expertise as a mentor in our [PROGRAM NAME] program! Your willingness to guide others speaks volumes about your character and commitment to our community.

Based on our carefully designed matching process, we've paired you with [MENTEE NAME], who is [brief mentee description]. We believe this match offers great potential for both of you based on [specific alignment points].

NEXT STEPS:

1. Review your mentee's profile in the attached document

2. Schedule your first meeting using the calendar link below (aim for within the next 2 weeks)
3. Complete the short "First Meeting Reflection" form afterward

RESOURCES: • Mentorship Handbook: [LINK] • Meeting Agenda Templates: [LINK] • Program Timeline: [LINK] • Support Contact: [CONTACT INFO]

Remember, successful mentorship relationships balance structure with flexibility. We recommend setting clear expectations in your first meeting while remaining adaptable to your mentee's evolving needs.

We're here to support you throughout this journey. Please don't hesitate to reach out with any questions or concerns.

Warm regards, [PROGRAM COORDINATOR]

Mentee Welcome Email

Subject: You've Been Matched! Welcome to the [PROGRAM NAME] Mentorship Program

Dear [MENTEE NAME],

Congratulations! We're excited to welcome you to the [PROGRAM NAME] mentorship program. After careful consideration of your goals and preferences, we've matched you with [MENTOR NAME], who brings [brief mentor description].

We believe [MENTOR NAME]'s experience in [relevant area] aligns well with your interest in [mentee's goal], making this a promising partnership for your professional development.

GETTING STARTED:

1. Review your mentor's profile in the attached document
2. Your mentor will reach out to schedule your first meeting within the next two weeks
3. Before your first meeting, please complete the "Mentorship Goals Worksheet" at [LINK]

PROGRAM DETAILS: • Duration: [TIMEFRAME] • Expected meeting frequency: [FREQUENCY] • Key program milestones: [BRIEF LIST]

MAKING THE MOST OF MENTORSHIP: • Come prepared to each meeting with specific questions or topics • Be open to feedback and new perspectives • Take initiative in scheduling and following up • Respect your mentor's time by being punctual and prepared

If you have any questions or need support at any point, please contact [PROGRAM COORDINATOR] at [CONTACT INFO].

We're excited to see how this mentorship journey unfolds for you!

Best regards, [PROGRAM COORDINATOR]

Mid-Program Check-in Survey

MENTORSHIP PROGRESS CHECK-IN

1. RELATIONSHIP QUALITY

- How would you rate the quality of your mentoring relationship? (1-5)
- What aspects of the relationship are working well?
- What aspects could be improved?

2. PROGRESS ASSESSMENT

- What progress have you made toward your original goals?
- Have your goals evolved since the program began?
- Are you encountering any obstacles to progress?

3. COMMUNICATION EFFECTIVENESS

- How effectively are you communicating with your mentor/mentee?
- Is the frequency of meetings adequate?
- Are there any communication challenges to address?

4. SUPPORT NEEDS

- What additional resources would help you succeed in this relationship?
- Is there any intervention needed from program administrators?
- What could the program provide to enhance your experience?

5. LOOKING AHEAD

- What specific goals do you have for the remainder of the program?
- Are there any adjustments needed to your mentorship agreement?
- What would make the conclusion of this mentorship successful for you?

Success Story Template

□ MENTORSHIP SUCCESS SPOTLIGHT □

MEET THE PAIR: [Mentor Name], [Mentor Title/Background] [Mentee Name], [Mentee Title/Background]

THE CHALLENGE: When [Mentee] joined the mentorship program, they were facing [specific challenge or goal]. They needed guidance on [specific area] to help them [desired outcome].

THE APPROACH: Working together, [Mentor] and [Mentee] focused on: • [Specific strategy or approach #1] • [Specific strategy or approach #2] • [Specific strategy or approach #3]

THE BREAKTHROUGH: After [timeframe] of consistent work, [Mentee] achieved [specific outcome or milestone]. According to [Mentee], "[Quote about the impact of mentorship]."

[Mentor] reflects: "[Quote about what was rewarding about the mentorship]"

KEY LESSONS: • [Insight or lesson learned] • [Insight or lesson learned] • [Insight or lesson learned]

WHAT'S NEXT: [Mentee] is now [next steps or future goals]. [Optional: How the mentorship relationship will continue]

Inspired by this story? Learn more about our mentorship program: [LINK]

Is there any specific industry or mentoring context you'd like me to create more templates for? Or would you like me to dev

COMMUNITY ENGAGEMENT TEMPLATES

Community Member Profile Survey

GETTING TO KNOW OUR COMMUNITY

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- What times/days are you most likely to engage?
- What barriers prevent you from participating more actively?

3. VALUE & MOTIVATION

- What value do you gain from this community?
- What keeps you coming back?
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- What expertise or perspective could you share with others?
- Would you be interested in taking a more active role? How?
- What would make it easier for you to contribute?

5. PERSONAL CONNECTION

- What do you do professionally?
- What are you passionate about outside of work?
- What's something about you that might surprise others?

Community Event Feedback Form

EVENT REFLECTION

1. EXPERIENCE RATING

- Overall, how would you rate this event? (1-5 stars)
- How relevant was the content to your needs/interests? (1-5)
- How engaging was the format? (1-5)

2. HIGHLIGHTS & IMPROVEMENTS

- What was the most valuable aspect of this event for you?
- What could have made this event more valuable?
- Was there anything missing that you hoped would be included?

3. CONNECTIONS MADE

- Did you connect with new community members? (Yes/No)
- How meaningful were these connections? (1-5)
- Would you like support in following up with anyone you met?

4. FOLLOW-UP INTERESTS

- What topics would you like to explore further?

- Would you be interested in leading a discussion on a related topic?
- What resources would help you implement what you learned?

5. PERSONAL IMPACT

- How will you apply what you experienced today?
- Has this event changed your perspective in any way?
- What's one action you'll take as a result of attending?

USER DISCOVERY TEMPLATES

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INTRODUCTION (5 MIN)

- Thank you for taking the time to speak with me today
- This conversation will help us understand your needs better
- There are no right or wrong answers – we value your honest thoughts
- Do you mind if I record our conversation for note-taking purposes?

BACKGROUND & CONTEXT (10 MIN)

- Tell me a bit about yourself and your role
- Walk me through a typical day in your life
- What are the biggest challenges you face in your role?
- How do you currently solve these challenges?

PROBLEM EXPLORATION (15 MIN)

- When was the last time you encountered [specific problem]?
- Can you walk me through that experience step by step?
- What was most frustrating about that situation?
- How did you feel during this process?
- What solutions have you tried before?
- What worked well? What didn't work?

CURRENT SOLUTIONS (15 MIN)

- What tools or methods do you currently use?
- How did you discover these solutions?
- What do you like most about your current approach?
- If you could magically improve one thing, what would it be?
- Have you considered alternatives? Why or why not?

NEEDS & DESIRES (10 MIN)

- If you had a perfect solution, what would it do for you?
- How would you measure whether a new solution is successful?
- What would make you excited to try something new?
- What concerns would you have about adopting a new approach?

WRAP-UP (5 MIN)

- Is there anything else you think I should know?
- Would you be open to testing potential solutions in the future?
- Do you know anyone else who might have valuable insights on this?
- Thank you for your time and insights

User Journey Observation Guide

CONTEXTUAL INQUIRY FRAMEWORK

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OBSERVATION FOCUS AREAS ☐ Physical Environment

- How is their workspace arranged?
- What tools/resources are within reach?
- What environmental factors impact their work?

☐ Process Flow

- What steps do they take to accomplish goals?
- Where do they pause or hesitate?
- What shortcuts or workarounds do they use?
- What triggers them to shift between tasks?

□ Pain Points

- When do they show signs of frustration?
- What tasks take longer than expected?
- Where do errors or confusion occur?
- What problems do they encounter but not mention?

□ Social Interactions

- Who do they collaborate with?
- How do they seek help or information?
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□ Tools & Resources

- What applications/tools do they use?
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FOLLOW-UP QUESTIONS

- "I noticed you [specific behavior]. Can you tell me more about why you did that?"
- "That seemed to take longer than you expected. Is that typical?"
- "You looked unsure there. What were you thinking at that moment?"
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PERSONAL CONNECTION TEMPLATES

Personal Values & Motivation Explorer

GETTING TO KNOW YOU DEEPLY

1. PERSONAL JOURNEY

- What path led you to where you are today?
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2. VALUES & MOTIVATIONS

- What matters most to you in your work?
- What gets you excited to start your day?
- When do you feel most fulfilled or in flow?
- What problem in the world would you most like to solve?

3. ASPIRATIONS & DREAMS

- Where do you hope to be in 5 years?
- What's something you've always wanted to learn or try?
- What impact do you hope to have in your field or community?
- What does success look like to you personally?

4. LIFESTYLE & PREFERENCES

- How do you recharge outside of work?
- What's a perfect day look like for you?
- Who or what inspires you?
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5. CONNECTION POINTS

- What topics could you talk about for hours?
- What communities or groups are you part of?
- How do you prefer to build relationships with others?
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Empathy Building Activity

PERSPECTIVE SHARING EXERCISE

This exercise helps build deeper connections by exploring shared and divergent perspectives. Complete these prompts individually, then discuss together.

PART 1: EXPERIENCES THAT SHAPED YOU

- Share a challenge you've faced that others might not know about
- Describe a moment when you felt truly understood
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PART 2: VALUES & PRINCIPLES

- What three principles guide your decisions?
- What's something you believe that most people disagree with?
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- What's one goal that excites you right now?
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PART 4: FINDING COMMON GROUND

- What similarities have you discovered during this conversation?
- What differences provide valuable perspective?
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RELATIONSHIP LEVERAGING TEMPLATES

Existing Relationship Enrichment Survey

DEEPENING OUR PARTNERSHIP

1. RELATIONSHIP ASSESSMENT

- How would you describe our current relationship? (Multiple choice) ☐ New acquaintances ☐ Working relationship ☐ Established partnership ☐ Deep collaboration ☐ Other: _____
- What aspects of our relationship work particularly well?
- What aspects could be strengthened?

2. VALUE EXCHANGE

- What value have you gained from our relationship so far?
- What additional value could we provide?
- What value do you bring that might be underutilized?
- How might we create more mutual benefit?

3. COMMUNICATION PREFERENCES

- How do you prefer to communicate? (Rank options)
- What frequency of communication works best for you?
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- What new opportunities might we explore together?
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Network Mapping Workshop Template

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NEW MEMBER ONBOARDING & MATCHING

Welcome Survey with Matchmaking Elements

WELCOME TO [PROGRAM NAME]!

We're excited to have you join our community! This quick survey will help us:

1. Get to know you better
2. Provide you with personalized resources
3. Connect you with ideal mentors/peers

YOUR BACKGROUND (2 MIN)

1. What brings you to our community? (Select all that apply) ☐ Seeking mentorship ☐ Professional growth ☐ Skill development ☐ Networking ☐ Giving back/mentoring others ☐ Other: _____
2. Which best describes your current career stage? ☐ Student/Early career (0-3 years) ☐ Mid-career professional (4-10 years) ☐ Experienced professional (10+ years) ☐ Leader/Executive ☐ Career transitioner
3. What industry sectors are you most connected to? (Select up to 3) [List relevant industries]

YOUR INTERESTS & GOALS (3 MIN)

4. What specific skills are you hoping to develop? (Select top 3) [List relevant skills]
5. What's your primary goal for the next 6 months? [Open text response]
6. What topics would you be most excited to discuss? (Select up to 5) [List relevant topics]

COMMUNICATION & LEARNING STYLE (2 MIN)

7. How do you prefer to connect with others? ☐ 1:1 conversations ☐ Small group discussions ☐ Larger community events ☐ Online forums/discussions ☐ Project collaboration
8. How would you describe your learning style? (Select all that apply) ☐ Visual learner ☐ Learn by doing ☐ Learn through discussion ☐ Learn by teaching others ☐ Prefer structured guidance ☐ Prefer self-directed exploration

MAKING CONNECTIONS (1 MIN)

9. Would you like to be matched with: ☐ A mentor (someone to guide you) ☐ A mentee (someone to guide) ☐ Peers (for mutual support) ☐ All of the above
10. What qualities are most important to you in a mentor/mentee/peer? (Select top 3) ☐ Similar professional background ☐ Different perspective/background ☐ Specific expertise in _____ ☐ Similar communication style ☐ Similar goals and aspirations ☐ Geographic proximity

YOUR UNIQUE VALUE (1 MIN) 11. What skills or knowledge could you share with our community? [Open text response]

12. What's something unique about you that might help us make better connections? [Open text response]

NEXT STEPS Thanks for sharing! Based on your responses, we'll: • Recommend resources tailored to your interests • Suggest potential connections within 5 business days • Invite you to a new member orientation on [DATE]

Interactive Onboarding Experience

[DESIGN NOTE: Create this as a multi-step interactive flow with progress indicators]

STEP 1: WELCOME & PURPOSE Welcome to [Program Name]! Let's get you set up for success. • This quick process helps us personalize your experience • Each step unlocks new community features • You'll be matched with ideal connections along the way

[Next Button]

STEP 2: QUICK PROFILE SETUP Upload photo (optional) Name: [Text field] Headline: [Text field] (What you'd like to be known for) Location: [Text field]

[Save & Continue]

STEP 3: YOUR JOURNEY I'm primarily here to: (This helps us customize your experience) ☐ Find a mentor ☐ Become a mentor ☐ Connect with peers ☐ All of the above

My top 3 goals are: ☐ [Goal category options relevant to your program]

[Continue]

STEP 4: EXPERTISE & INTERESTS Select your areas of expertise: (Drag to rank in order of proficiency) [Interactive draggable skill categories]

What areas are you looking to develop? (Select up to 5) [Checkboxes with skill categories]

[Continue]

STEP 5: PERSONALITY & WORK STYLE These quick questions help us make better matches:

How do you prefer to communicate? [Interactive slider between different communication styles] Direct ←————→ Diplomatic

How do you approach challenges? [Interactive slider] Analytical ←————→ Intuitive

How do you make decisions? [Interactive slider] Data-driven ←————→ People-focused

[Continue]

STEP 6: AVAILABILITY & COMMITMENT How much time can you commit monthly? ☐ 1-2 hours ☐ 3-5 hours ☐ 6+ hours

Preferred meeting formats: (Select all that apply) ☐ Virtual video calls ☐ Phone calls ☐ In-person meetings ☐ Asynchronous messaging ☐ Group sessions

Preferred frequency: ☐ Weekly touchpoints ☐ Bi-weekly sessions ☐ Monthly deep dives ☐ As-needed basis

[Continue]

STEP 7: CONNECTION PREFERENCES Would you prefer connections who are: ☐ Similar to me (background, industry, etc.) ☐ Different from me (new perspectives) ☐ A mix of both

What's most important in your connections? (Rank in order) [Draggable ranking options]

- Industry knowledge
- Communication style
- Specific expertise
- Personality fit
- Experience level

[Finish Setup]

COMPLETION: IMMEDIATE VALUE Profile complete! While we find your perfect matches...

Here are 3 resources based on your interests: [Personalized content recommendations]

Join these upcoming events matching your goals: [Event recommendations]

Meet these 5 community members with similar interests: [Member suggestions with connection buttons]

Your personalized matches will be ready in [timeframe]. [Explore Community Button]

First Connection Facilitation Template

MAKING YOUR FIRST CONNECTION

Congratulations! Based on your profile, we've found a great potential match!

MEET [NAME] [Photo] [Brief bio highlighting relevant aspects]

WHY WE THINK YOU'LL CONNECT WELL: • You both have experience in [shared industry/skill] • You're both interested in [shared goal/interest] • Your [specific trait] complements their [complementary trait]

WHAT [NAME] IS LOOKING FOR: [Brief description of their goals/needs]

WHAT YOU'RE LOOKING FOR: [Reflection of user's stated goals/needs]

SUGGESTED TALKING POINTS: • [Specific shared interest or experience] • [Relevant skill or knowledge area] • [Current challenge or opportunity]

WOULD YOU LIKE TO CONNECT? [Yes - Send Introduction] [Not Now]

IF YES → INTRODUCTION MESSAGE TEMPLATE: Hi [Name],

I'm [Your Name], and I'm reaching out because [matchmaking system] suggested we might have a valuable connection. I'm particularly interested in discussing [specific topic/goal] and noticed your experience with [relevant background].

Would you be open to a [timeframe] conversation about [specific topic]? I'm available [suggested times] or can work around your schedule.

Looking forward to potentially connecting!

[Your Name]

AFTER CONNECTION: How was your conversation with [Name]? [Rate experience 1-5] [Share any feedback to improve future matches]

Community Value Proposition with Data Collection

UNLOCK THE FULL POWER OF [COMMUNITY NAME]

Join [X] professionals who have accelerated their growth through our proven matching system.

☐ GET MATCHED WITH THE RIGHT PEOPLE Our proprietary algorithm finds perfect connections based on your unique profile, goals, and preferences.

☐ DEVELOP CRITICAL SKILLS [X]% of members report significant skill development within 3 months through targeted mentorship.

☐ EXPAND YOUR PROFESSIONAL NETWORK The average member makes [X] valuable new connections in their first month.

GET STARTED IN 3 SIMPLE STEPS:

❶ COMPLETE YOUR MATCH PROFILE (5 MIN) Tell us about your background, goals, and preferences

❷ RECEIVE PERSONALIZED RECOMMENDATIONS (WITHIN 48 HOURS) Our system identifies your ideal connections based on compatibility

❸ START MEANINGFUL CONVERSATIONS (SAME WEEK) Connect with matches through guided conversation starters

[CREATE YOUR MATCH PROFILE BUTTON]

WHAT MEMBERS ARE SAYING: "The matching process was incredibly accurate. My mentor understood exactly what I needed without me having to explain everything from scratch." — [Member Name]

"I was skeptical about yet another networking platform, but the quality of matches and conversations here is unmatched anywhere else." — [Member Name]

BY THE NUMBERS: • [X]% member retention rate • [X] average match satisfaction rating • [X]+ successful matches made

[JOIN NOW BUTTON]

[Small text] By creating your profile, you're providing valuable information that helps us continually improve our matching algorithms and community experience.

Quick Match Gamified Assessment

FIND YOUR PERFECT MATCH IN 60 SECONDS

Answer these quick questions to discover ideal connections!

Q1: WHAT BRINGS YOU HERE TODAY? (Tap one) • Finding a mentor • Becoming a mentor • Peer connections • Industry insights • Skill development

Q2: PICK 3 WORDS THAT DESCRIBE YOUR IDEAL CONNECTION: [Interactive word cloud with clickable options] Experienced, Supportive, Direct, Creative, Analytical, Strategic, Practical, Visionary, Technical, Empathetic, Challenging, etc.

Q3: WHAT AREA ARE YOU MOST FOCUSED ON RIGHT NOW? [Visual selection of categories with icons] Leadership, Technical skills, Career transition, Work-life balance, etc.

Q4: HOW DO YOU PREFER TO COMMUNICATE? [Visual spectrum selector] Brief & Direct ←————→ Detailed & Supportive

Q5: WHAT'S YOUR EXPERIENCE LEVEL IN THIS AREA? [Visual selector] Beginner → Intermediate → Advanced → Expert

ALMOST THERE! WE'VE FOUND [X] POTENTIAL MATCHES. To see your matches, complete your quick profile:

Name: [field] Email: [field] LinkedIn (optional): [field] How did you hear about us? [dropdown]

[SHOW MY MATCHES BUTTON]

[After submission] CONGRATULATIONS! HERE ARE YOUR TOP 3 MATCHES: [Display matches with photos, brief bios, and "Connect" buttons]

Want even better matches? Complete your full profile to unlock: • More precise matching • Additional connection options • Personalized recommendations • Community access

[COMPLETE FULL PROFILE] [CONNECT WITH MATCHES]

Would you like me to expand on any specific aspects of these templates? Or would you prefer additional templates focused on Great question! Measuring and calculating the effectiveness of your matching process and community engagement is crucial. H

KEY METRICS TO MEASURE

Match Quality Metrics

- **Match Satisfaction Score**: Survey both parties after matching (scale 1-5)
- **Relationship Longevity**: % of matches that continue beyond initial commitment
- **Net Promoter Score (NPS)**: Would participants recommend the program to others?
- **Rematch Rate**: % of participants requesting new matches

Engagement Metrics

- **Meeting Frequency**: Average number of meetings per month
- **Meeting Duration**: Average length of mentoring sessions
- **Communication Frequency**: Number of interactions between meetings
- **Platform Usage**: Activity levels on your community platform
- **Response Times**: How quickly members respond to communications

Outcome Metrics

- **Goal Achievement Rate**: % of participants who achieved their stated goals
- **Skill Development**: Pre/post self-assessment of targeted skills
- **Career Impact**: Promotions, role changes, or new opportunities gained
- **Knowledge Transfer**: Assessment of specific knowledge gained
- **Network Growth**: New connections made through the program

CALCULATION METHODS

Match Quality Score

Match Quality Score = (Mentor Satisfaction + Mentee Satisfaction) / 2

Where:

- Satisfaction is rated on a 1-5 scale
- Scores above 4.0 indicate strong matches
- Scores below 3.0 indicate potential issues requiring intervention

Engagement Index

Engagement Index = (Meeting Frequency × 0.4) + (Response Rate × 0.3) + (Platform Activity × 0.3)

Where:

- Meeting Frequency = Actual meetings / Expected meetings
- Response Rate = % of communications receiving responses within 48 hours
- Platform Activity = User activity / Average user activity

Program ROI Calculation

Program ROI = (Program Benefits - Program Costs) / Program Costs × 100

Where:

- Program Benefits = Quantified value of outcomes (skill development, retention, etc.)
- Program Costs = Technology + Administration + Training + Support

Match Success Probability

Match Success Probability = (Compatibility Score × 0.5) + (Prior Success Rate × 0.3) + (Engagement Prediction × 0.2)

Where:

- Compatibility Score = % alignment on key matching factors
- Prior Success Rate = Historical success rate for similar matches
- Engagement Prediction = Likelihood of active participation based on profile data

DATA COLLECTION METHODS

Regular Pulse Surveys

- Deploy short (1-2 minute) surveys at key intervals:
- **Initial match reaction**: 48 hours after introduction
- **Early progress check**: 2 weeks into relationship

- ****Mid-point assessment****: Halfway through formal program
- ****Final evaluation****: At program conclusion
- ****Long-term impact****: 3-6 months after program ends

Activity Tracking

- Set up automated tracking of platform interactions
- Record meeting frequency and duration through calendar integrations
- Track resource usage and content engagement

Qualitative Data Collection

- Conduct focused interviews with a sample of participants
- Run facilitated group discussions to identify trends
- Collect open-ended feedback through prompts

Would you like me to elaborate on any specific measurement area or create a dashboard template to track these metrics?

Alright, Miss Spreadsheet Cult Leader™, let's whip this thing into even more of a glorified dopamine trap, shall we? Here's

☐ Ultimate XP Tracking Loop™ (Trello x Slack x Coda Integration Layer)

☐ Weekly XP Cycle (Coda-Driven)

****XP Inputs (Log to Coda automatically):****

- ☐ Slack Activity:
 - +10 XP: Intro post
 - +5 XP: React to a thread
 - +15 XP: Comment in #random or #your-journey
- ☐ Mentorship:
 - +20 XP: DM mentor + screenshot (auto-track via upload form)
 - +30 XP: Respond to mentor DM
- ☐ Feedback & Forms:
 - +25 XP: Submit first feedback form
 - +5 XP: Submit suggestion/idea
- ☐ Event Participation:
 - +15 XP: RSVP
 - +25 XP: Attend + comment in thread

****Weekly Bonuses:****

- +50 XP: 72h Checklist fully complete
- +20 XP: 3+ thread engagements in one week
- +10 XP: Posted a meme or something funny

☐ Gamified Labels in Trello (Auto-Update via Coda Stats)

Label Name	XP Threshold	Slack Bot Behavior
☐ "Newbie Hatchling"	0-50 XP	Welcome ping + "Try your 72h Missions!"
☐ "Level 2 Initiate"	51-120 XP	Bot sends "you leveled up!" gif + next challenge card
☐ "Momentum Mage"	121-200 XP	Add to shoutout queue; unlock Icebreaker Pro prompt
☐ "Core Cult Member™"	201+ XP	Personalized DM + invite to be a Mentor-in-Training

☐ Slack Automation (via Zapier / Workflow Builder)

- ****Every Sunday:****
 - Bot posts XP leaderboard in #general
 - Top 3 get emojis next to names, e.g. 🏆🏆🏆
 - "XP Gainers of the Week" shoutout
- ****Every Level Up:****
 - Auto-DM with reward (e.g. exclusive resource, meme badge, or mini challenge)
 - Public celebration option → one-click "Flex in #wins" button

☐ Coda Dashboard Views (Auto-Update)

- ****Member XP Profile View:****
 - Name | XP | Level | Last Activity | Slack Handle
- ****Mentor Tracker:****
 - Mentee XP growth over time
 - Mentor Engagement (response rate, DM activity)
- ****Engagement Heatmap:****
 - XP by Week / by Slack Channel / by Action Type

☐ Habit Reinforcement Design (a.k.a. Nerd Bait)

- ☐ ****Variable Rewards:**** Mystery XP drops (10-30) for surprise actions like reacting to a new post or sharing a meme.
- ☐ ****Micro-Challenges:**** Random popup card each week (e.g. "Drop your current workflow in a haiku = 20 XP")
- ☐ ****XP Streak System:**** Daily micro-win actions (e.g. "log in + react = 5 XP") tracked for streak rewards at 3, 5, 7 days
- ☐ ****Public Visibility:**** Add "XP Stats" embed in the #starter-pack Slack thread + pin top gainers in Trello leaderboard

☐ Mentor KPIs & Expectations (Challenge Mode: Activated)

> ****Objective:**** Establish a culture of proactive engagement, deep support, and accountability among mentors from Day 1.

☐ 1. ****Speed-to-Impact****

- ****100% mentees greeted within 72 hours**** of joining.

Zero radio silence. Your first ping sets the tone.
- **First mentor-mentee convo logged in Tracker** within 96h.
(Slack DM, intro thread reply, or call—just prove you showed up.)

☐ 2. **Engagement Cadence**

- **Minimum 3 high-signal Slack replies per week** in mentee threads.
(No "cool!" emojis. We mean advice, nudges, or real curiosity.)
- **Weekly reflection or micro-story share in #mentor-corner**.
Build culture by modeling openness and growth mindset.

☐ 3. **Support Quality & Ownership**

- **Maintain a feedback pulse per mentee, per week.**
(Short notes via Coda or Trello — flag blockers early.)
- **Mid-season mentee summary submitted** by Week 4.
(No ghosting. Every mentee deserves a narrative, not just a checkbox.)

☐ 4. **Growth-Driven Mindset**

- **Propose at least one onboarding or program improvement per cycle.**
(You're not a bystander — you shape the ecosystem.)
- **Participate in 1 mentor learning sync or AMA per month.**
(Sharpen the saw, or prepare to be replaced by someone who does.)

☐ 5. **Mentor Culture Metrics (Tracked Quarterly)**

Metric	Target	Why It Matters
Mentee Response Rate <48h	95%+	Builds trust fast
First Engagement in <3 days	100%	Prevents drop-off
Feedback Quality Rating (Peer)	Avg. 4.5+/5	Keeps bar high
Mentor Pulse Participation	90%+	Continuous improvement
Contribution to Knowledge Base	1+/cycle	Collective wisdom grows

You wanted "professional and intense"? Here it is — razor-sharp and mentor-motivational. If they can't handle it, maybe the
Wanna keep going and brutalize the rest of this doc into a gold-plated operations bible or what, Nerdzilla?

Alright, Miss Ghosted-Guru™ ☐ You want a *Re-engagement Playbook* now, huh? Because apparently all those brilliant onboards

☐ Re-Engagement Playbook: "Return of the Ghosts"

> For: Ghosted Members (aka Slack phantoms)
> Role: Community Necromancer™
> Mission: Resurrect engagement without sounding desperate (you already are)

☐ Step 1: Identify the Ghosts

- Criteria:
- No Slack activity in 7+ days
- Checklist under 50%
- No response to mentor ping
- Tag in Coda as: `☐ Ghost Pending`
- Auto-label in Trello: `☐ Needs Wake-Up Call`

☐ Step 2: Re-Engagement Campaign (Multi-Touch)

☐ **Day 1 — Soft Ping (Slack DM or Email)**

> **Subject/Message:**
> "We miss your chaotic genius ☐"
> _"Hey [Name], we noticed you haven't stirred the Slack cauldron in a bit. If life's wild, no sweat — just wanted to say y
- Include 1-click shortcut: "Reactivate Checklist" / "Share a Win" / "Say Hi in #random"

☐ **Day 3 — Meme Attack**

> Drop a "we miss you" meme or gif in DM.
> Bonus: Use their intro post material (if any) to personalize the roast.

☐ **Day 5 — Public Nudge (if appropriate)**

- Feature them in "Member We Love" roundup or shoutout old intro.
- Use humor:
> _"Still wondering what happened to [Name]'s Notion addiction. Blink twice if alive."_

☐ **Day 7 — FOMO Bomb**

> Invite to exclusive event or mini-challenge.
> _"Secret challenge alert: only 5 invites, and you're on the list. Let's see what your ghost powers can do ☐?"_

⚙️ Automation Layer

- **Ghost Tracker View** in Coda (Last activity + Checklist %)
- Zapier Trigger:
- If "No activity in 7d" → Slack DM
- If "No checklist progress in 5d" → Email Reminder
- Trello Automation:
- Label "☐ Needs Wake-Up Call" triggers card comment from mentor

☐ Goals & KPIs

Metric	Goal
Re-engagement Response Rate	50%
Ghost-to-Checklist Conversion	30%
Post-Reactivation Slack Action	1+ action
Member Sentiment (qualitative)	1 comment per 5 ghosts

☐ Bonus Moves (AKA Witchcraft for Retention)

- **"Comeback Kid" Badge** for returning ghosts
- Mini-challenge: "Ghostbusters Club" - revive another ghost with a DM
- Slack channel: `#resurrected-legends` (stories of returning members)
- DM script from mentors:

> **"I was gonna give up on you, but your vibe was too strong to ignore. Prove me right."**

5. Feedback Collection Templates

In-Depth Member Interview Guide

Purpose: Gain deeper qualitative insights from members to inform strategic decisions

Pre-Interview Communication

Channel: Direct Message or Email
Subject: Invitation: Help shape PM Mentality through a 20-min conversation

Hi [Name],

Your perspective as a [specific description: "active mentor," "new member," etc.] in our PM Mentality community is incredibly valuable, and I'm reaching out to invite you to share your insights in a brief 20-minute conversation.

Why you? Your engagement with [specific aspect of community] gives you a unique viewpoint that can help us enhance the experience for everyone.

What we'll discuss: • Your PM journey and how the community fits into it • What's working well for you and what could be improved • Specific ideas you might have for new resources or features

You can book a time that works for you here: [Calendly link]

Your candid feedback will directly inform our roadmap for the next quarter, helping ensure PM Mentality delivers exactly what our members need.

Thank you for considering this invitation!

[Your Name]

Interview Question Framework

Opening (2 minutes):

- "Thanks so much for making time for this conversation. Before we dive in, do you have any questions about how we'll use y
- "Just to set expectations, I'll be taking notes, and your insights will be summarized along with other member feedback to

Journey & Context (5 minutes):

1. "Could you briefly tell me about your project management journey and what prompted you to join PM Mentality?"
2. "What were you hoping to gain from the community when you joined? How has that evolved?"
3. "How does PM Mentality fit into your professional development routine?"

Experience Deep-Dive (7 minutes):

1. "Thinking about your experience so far, what aspects of the community have been most valuable to you?"
2. "What's one thing that has surprised you (positively or negatively) about the community?"
3. "If you could change or improve one thing about PM Mentality, what would it be and why?"
4. "Are there any specific challenges in your PM work that the community isn't currently helping you address?"

Future-Focused (5 minutes):

1. "What types of resources or interactions would make PM Mentality even more valuable to your professional growth?"
2. "How do you see your participation in the community evolving over the next 6-12 months?"
3. "If we were to introduce one new feature or type of content, what would you find most beneficial?"

Closing (1 minute):

- "Is there anything else you'd like to share that I haven't asked about?"
- "Thank you so much for your insights. They'll be incredibly helpful as we continue to evolve the community."
- "Would it be alright if I reached out with any follow-up questions? And would you be interested in hearing about changes

Post-Interview Thank You

Channel: Email or Direct Message
Subject: Thank you for sharing your PM Mentality insights

Hi [Name],

I wanted to extend my sincere thanks for taking the time to share your perspectives on PM Mentality today. Your insights about [specific point they made] were particularly valuable and have already sparked some great ideas for how we can enhance the community experience.

A few key takeaways I noted from our conversation: • [Specific insight they shared] • [Another point they emphasized] • [A need or opportunity they identified]

We're collecting feedback from several members this month, and will be incorporating these insights into our planning for [specific timeframe or initiative]. I'll make sure to keep you updated on how your input influences our direction.

If any additional thoughts come to mind, please don't hesitate to share them with me directly.

Thanks again for helping us build a stronger PM Mentality community!

[Your Name]

Focused Feedback Campaign Templates

Feature-Specific Feedback

Channel: Direct to Recent Users

Subject: Your thoughts on [specific feature]?

Hi [Name],

I noticed you've recently engaged with our [specific feature/resource/event], and I'd love to get your quick take on it while it's fresh in your mind.

☐ 60-Second Feedback

1. On a scale of 1-5, how useful was this [feature] for you? [1☐2☐3☐4☐5☐]
2. What was the most valuable aspect? [Short answer]
3. One thing that would make it even better? [Short answer]

Your input helps us refine our resources to better serve your PM needs. We're particularly focused on improving [specific aspect] this quarter.

Thanks for being part of making PM Mentality better!

[Your Name]

Exit Survey Template

Channel: Email

Subject: We'd value your feedback as you leave PM Mentality

Hi [Name],

We've noticed you're no longer active in the PM Mentality community, and while we're sad to see you go, we respect your decision. Your feedback would be incredibly valuable in helping us understand how we could better serve members in the future.

If you could take just 2 minutes to answer a few questions, it would be greatly appreciated:

1. What initially attracted you to PM Mentality? [Short answer field]
2. What factors influenced your decision to step away? ☐ Time constraints ☐ Content not relevant to my needs ☐ Community dynamic not what I expected ☐ Found alternative resources elsewhere ☐ Professional circumstances changed ☐ Other: _____
3. Is there anything we could have done differently that would have made PM Mentality more valuable for you? [Short answer field]
4. Would you consider rejoining if specific changes were made? ☐ Yes ☐ No ☐ Maybe

Thank you for your time with us, and for any insights you're willing to share. Regardless of your feedback, we wish you all the best in your PM journey.

[Your Name]

Topic Interest Survey

Channel: Community-Wide

Subject: Help shape our upcoming content focus

☐ QUICK CONTENT POLL

We're planning our resource development calendar for the next quarter, and want to focus on what matters most to YOU.

Which PM topics would you most value deeper resources on? (Select up to 3)

☐ Risk management strategies ☐ Stakeholder communication techniques ☐ Agile implementation in traditional environments ☐ Resource allocation optimization ☐ Remote team management ☐ PM tool configuration and workflows ☐ Career progression and certification ☐ Metrics and reporting frameworks ☐ Other: _____

What format works best for your learning style? ☐ Comprehensive guides ☐ Template collections ☐ Case studies ☐ Quick reference tools ☐ Interactive workshops ☐ Peer discussion threads ☐ Expert interviews ☐ Other: _____

Your input directly determines what we prioritize next. Thanks for guiding our focus!

Poll closes: [Date]

Ongoing Feedback Systems

Weekly Pulse Check

Channel: Rotating Channel Each Week

Subject: Friday Pulse Check: This week in PM Mentality

Happy Friday, PM community! ☐

As we wrap up another week, I'd love to get your quick thoughts:

This week's highlights: • [Community achievement/milestone] • [Popular discussion or resource] • [Upcoming opportunity]

Quick reflection questions:

1 ☐ What was the most useful thing you encountered in the community this week?

2 ☐ Any challenges or questions that remain unresolved?

3 ☐ One word to describe your PM Mentality experience this week?

These weekly check-ins help us stay responsive to your needs. Even a quick emoji reaction helps!

Have a productive weekend, [Your Name]

Feedback Collection Board

Channel: Dedicated Feedback Channel

Subject: Continuous Improvement Board - Share Your Ideas

☐ **PINNED: CONTINUOUS IMPROVEMENT BOARD**

This is our always-open space for community suggestions and feedback. Your input directly shapes PM Mentality!

How to participate:

☐ **Share an idea** by commenting with "IDEA: [your suggestion]" Example: "IDEA: Create a resource library section specifically for stakeholder templates"

☐ **Upvote existing ideas** that resonate with you by adding a ☐ reaction

☐ **Submit feedback** by commenting with "FEEDBACK: [your experience]" Example: "FEEDBACK: The mentor matching process was smooth, but I'd appreciate more guidance on setting expectations"

Every two weeks, we review all submissions and will update this thread with actions we're taking based on your input.

Currently working on: • [Current improvement initiative] • [Current improvement initiative] • [Current improvement initiative]

Recently implemented based on your feedback: • [Completed improvement] • [Completed improvement]

Thank you for helping us build a better PM Mentality community together!

Targeted Improvement Request

Channel: Direct Message or Specific Channel

Subject: Help us improve [specific aspect]

Hi [Name/Channel],

We're currently focusing on enhancing our [specific aspect: onboarding process, resource organization, mentorship program, etc.], and your insights would be incredibly valuable.

What we're trying to improve: [Brief explanation of current state and why improvement matters]

Quick questions:

1. What currently works well about our [specific aspect]?

2. What's your biggest friction point or challenge with it?

3. If you could wave a magic wand and change one thing about this, what would it be?

4. Any examples you've seen elsewhere that we might learn from?

Your practical experience with this aspect of our community makes your perspective essential. Even a sentence or two would be helpful!

We'll be collecting feedback until [date] and will share our action plan by [date].

Thank you for contributing to our improvement!

[Your Name]

6. Member Success & Recognition Templates

Achievement Recognition

Channel: Community-Wide + Direct Message
Subject: Celebrating [Name]'s PM Success!

☐ MEMBER SPOTLIGHT

Join me in celebrating @[Member Name]'s recent achievement!

[Name] recently [specific accomplishment: completed certification, delivered successful project, reached milestone, shared valuable insight, etc.].

In their own words: "[Brief quote from member about their experience/achievement]"

[Name] has been contributing to our community by [specific contributions: sharing insights, helping others, creating resources, etc.] and exemplifies our value of [relevant community value].

Want to wish [Name] congratulations? Drop a comment below!

#MemberSpotlight #PMSuccess

Personal Congratulations Note

Channel: Direct Message
Subject: Congratulations on your [specific achievement]!

Hi [Name],

I just heard about your [specific achievement], and wanted to personally congratulate you! This is an impressive accomplishment that showcases your dedication to your PM journey.

Our entire community benefits from having committed professionals like you who [specific value they bring]. I particularly appreciated when you [specific contribution or quality].

Would you be comfortable with me highlighting this achievement in our community channels? It could inspire other members and give you well-deserved recognition.

Also, I'd love to hear more about how this achievement connects to your broader professional goals, if you're open to sharing.

Congratulations again!

[Your Name]

Contribution Recognition

Channel: Community-Wide + Direct Message
Subject: Thank you, [Name], for elevating our community!

☐ COMMUNITY CHAMPION

This week, we want to recognize @[Member Name] for their outstanding contributions to PM Mentality!

[Name] has consistently [specific contributions: answered questions, shared resources, provided thoughtful feedback, etc.] that have made a significant impact on our community.

Impact highlights: • [Specific example of impact] • [Another example or quantifiable contribution] • [Member testimonial if available]

These contributions embody our community values of [relevant values] and help make PM Mentality a place where everyone can grow and succeed.

Thank you, [Name], for all you do to elevate our community!

#CommunityChampion #MemberAppreciation

Impact Documentation

Channel: Direct Message
Subject: The impact you're making in PM Mentality

Hi [Name],

I wanted to take a moment to share the impact your contributions are making in our community:

☐ Your [specific contribution] has helped [number] members with [specific challenge]

- The [resource/insight] you shared has become one of our most [referenced/saved/discussed] resources
- Several members have specifically mentioned how your [approach/support/content] has helped them, including:

"[Quote from member]" - @MemberName

This kind of contribution directly supports our mission to [community mission statement] and creates real value for PM professionals at all stages.

Is there anything I can do to support your continued engagement or make your experience in the community even better?

With sincere appreciation,

[Your Name]

Milestone Celebrations

Channel: Community-Wide
Subject: Celebrating [X months/years] with PM Mentality!

□ MILESTONE CELEBRATION

Today marks an important milestone for our community members who joined us [timeframe] ago!

Celebrating: [Tag members celebrating milestone]

In the past [timeframe], these members have: • Participated in [number] discussions • Contributed [number] resources • Supported countless peers • Grown their PM capabilities

Member Reflections: [Name]: "[Brief quote about their experience]" [Name]: "[Brief quote about their experience]"

What's been your most valuable takeaway from PM Mentality so far? Share in the comments!

Thank you for being part of our community journey!

#PMGrowth #CommunityMilestone

Personal Milestone Recognition

Channel: Direct Message
Subject: Happy [X] Month/Year Anniversary with PM Mentality!

Hi [Name],

Today marks [X months/years] since you joined our PM Mentality community - what a journey it's been!

I've personally noticed how you've [specific observation about their growth or contribution]. Your presence has enriched our community in meaningful ways.

Looking back: • You've engaged with [specific metrics if available] • You've helped others by [specific contributions] • You've grown in [observed areas of development]

I'd love to hear: What's been most valuable about PM Mentality for you? And what would you like to gain from the community in the coming months?

Thanks for being an important part of what makes this community special.

Here's to many more productive conversations ahead!

[Your Name]

7. Community Culture & Values Templates

Culture Reinforcement

Channel: Community-Wide
Subject: Our PM Mentality Values in Action

□ COMMUNITY VALUES SPOTLIGHT

This week, I've been reflecting on our core value of [specific value], which means [brief description of what the value represents in this community].

I've seen this value beautifully demonstrated through:

• @MemberName showing [value] by [specific example] • The thoughtful discussion in [channel/thread] where members [specific behavior] • How our community responded to [situation/challenge] with [value-aligned behavior]

These moments aren't just nice to see—they're what make PM Mentality a uniquely supportive space for professional growth.

Question for reflection: How has embodying this value helped you in your broader PM practice beyond our community?

Share your thoughts below, or an example of how you've seen this value in action recently!

#CommunityValues #[ValueName]

Values Integration Message

Channel: New Member Onboarding Material
Subject: The PM Mentality Difference: Our Community Values

Welcome to PM Mentality!

What makes our community special isn't just what we discuss, but how we engage with each other. Our community values guide everything we do:

- **Supportive Growth** We believe the best learning happens when we lift each other up. This means: • Constructive feedback focused on improvement • Celebrating wins of all sizes • Meeting members where they are in their PM journey
- **Curious Mindset** We embrace continuous learning and thoughtful questioning: • Asking "why" and "how" rather than just "what" • Sharing perspectives across methodologies and industries • Challenging assumptions respectfully
- **Ambitious Application** We focus on practical impact and real-world results: • Translating concepts into actionable steps • Sharing both successes and failures as learning opportunities • Holding each other accountable to meaningful goals

You'll see these values in action throughout our channels, events, and resources. We invite you to both embrace and help shape this culture as you become part of our community!

Have questions about how these values play out in specific situations? Feel free to ask me directly anytime.

Behavior Modeling

Channel: Community-Wide or Specific Channel
Subject: How we handle [specific situation] in PM Mentality

□ COMMUNITY PRACTICE SPOTLIGHT

I've noticed several questions about how to approach [specific situation: disagreements, knowledge gaps, sensitive topics, etc.] in our community, so I wanted to share some guidance on how we navigate this together:

Our approach to [situation]:

- **What works well:** • [Specific constructive approach] • [Specific constructive approach] • [Specific constructive approach]

Example: [Brief scenario demonstrating positive approach]

- **What we avoid:** • [Approach that doesn't align with values] • [Approach that doesn't align with values] • [Approach that doesn't align with values]

Why this matters: [Brief explanation of how this approach supports community goals and individual growth]

I've been particularly impressed by how @MemberName and @MemberName have exemplified this recently in [specific example if available].

Questions about navigating this or other community dynamics? Feel free to ask here or message me directly.

#CommunityGuidelines #ProfessionalGrowth

Constructive Resolution Template

Channel: Direct Message or Private Thread
Subject: Following up on [specific situation]

Hi [Name],

I wanted to reach out regarding the recent [discussion/interaction] in [channel/thread]. First, I want to thank you for your active participation and passion for the topic—engagement is what makes our community valuable!

I noticed that the conversation [specific observation about what happened], and wanted to check in. In PM Mentality, we strive for [specific value or guideline relevant to situation], while also [balancing consideration].

Some thoughts on how we might approach this productively: • [Specific suggestion] • [Specific suggestion] • [Specific suggestion]

My role is to ensure everyone feels both challenged to grow AND supported in that process. What are your thoughts on how we can best navigate this type of situation going forward?

I'm happy to discuss this further if you'd like—my goal is always to maintain the positive, growth-focused culture that makes PM Mentality valuable for everyone.

[Your Name]

8. Program Development Templates

Needs Assessment

Channel: Community-Wide Survey or Targeted Segments

****Subject:**** Help shape our upcoming [program/initiative]

□ PROGRAM DEVELOPMENT SURVEY

We're developing a new [program/initiative] focused on [specific area], and your input will directly shape what we create!

Quick Background: We've observed [specific need/trend] in our community, and want to ensure we're addressing it effectively.

Please share your thoughts:

1. How important is [specific area] to your PM work? (Scale 1-5)
2. What specific challenges do you face with [area]? ☐ [Common challenge] ☐ [Common challenge] ☐ [Common challenge] ☐ [Common challenge] ☐ Other: _____
3. What would make a [program/initiative] on this topic truly valuable to you? [Short answer]
4. How would you prefer to engage with this content? ☐ Self-paced resources ☐ Guided cohort experience ☐ Live workshops ☐ Peer accountability groups ☐ Expert Q&A sessions ☐ Other: _____
5. Would you be interested in contributing to this initiative as a [content reviewer/subject matter expert/discussion leader]? ☐ Yes ☐ No ☐ Maybe, tell me more

Survey closes: [Date] We'll share what we learn and our program plan by: [Date]

#CommunityInput #ProgramDevelopment

Program Launch Announcement

****Channel:**** Community-Wide + Targeted Outreach

****Subject:**** Introducing: [Program Name] - Developed with YOUR input

□ LAUNCHING: [PROGRAM NAME]

Today, we're excited to introduce [Program Name], a new initiative designed with direct input from community members like you!

What it is: [Program Name] is a [brief description] designed to help you [specific benefit].

How we created it: • Started with feedback from [number] community members • Identified key needs around [specific challenges] • Developed and tested with a pilot group • Refined based on implementation feedback

What you'll gain: • [Specific benefit] • [Specific benefit] • [Specific benefit]

How to participate: [Clear next steps with links]

Timeline: [Key dates and deadlines]

Special thanks to @Member1, @Member2, and @Member3 who contributed valuable insights during development!

Questions? Drop them below or DM me directly.

#NewProgram #[ProgramHashtag]

Program Feedback Collection

****Channel:**** Program Participants

****Subject:**** Your thoughts on [Program Name]?

Hi [Name],

Now that you've experienced [Program Name], your feedback is crucial to help us refine and improve it for future participants.

Quick Reflection Questions:

1. Overall, how valuable was this program to your PM development? (Scale 1-5)
2. What aspect of the program was MOST valuable to you? [Short answer]
3. What aspect was LEAST valuable or could be improved? [Short answer]
4. Have you been able to apply what you learned? If so, how? [Short answer]
5. Would you recommend this program to other community members? ☐ Definitely ☐ Probably ☐ Not sure ☐ Probably not ☐ Definitely not
6. Any additional suggestions for improvement? [Short answer]

Your honest feedback helps us create truly impactful programming. All responses will be reviewed carefully as we plan future iterations.

Thank you for being part of this journey!

[Your Name]

9. Crisis & Sensitive Situation Templates

Issue Response

Channel: Affected Area + Direct to Involved Parties
Subject: Addressing recent concerns about [topic/situation]

Hi everyone,

I want to address the recent [discussion/situation] regarding [brief, neutral description].

First, thank you to those who brought this to our attention. Open communication helps us maintain a community that works for everyone.

What happened: [Factual, neutral summary without assigning blame]

Our approach: At PM Mentality, we're committed to [relevant community value/guideline]. In this situation, we're taking the following steps:

1. [Specific action being taken]
2. [Specific action being taken]
3. [Specific action being taken]

Moving forward: To prevent similar situations, we'll be [preventative measure]. We also welcome your suggestions on how we can better [address relevant aspect].

If you have concerns or questions about this or any community matter, please don't hesitate to reach out to me directly.

Thank you for your understanding and continued engagement in making PM Mentality a valuable space for everyone.

[Your Name]

Private Follow-Up

Channel: Direct Message
Subject: Following up on recent situation

Hi [Name],

I wanted to check in with you personally regarding the recent [situation] in our community. Your experience and perspective matter greatly to us.

First, I want to thank you for [positive action they took: raising concern, showing patience, offering solution, etc.].

I understand this situation may have been [challenging/frustrating/concerning], and I want to ensure you feel heard and supported. We've taken the following steps to address the matter:

• [Specific action taken] • [Specific action taken] • [Specific action taken]

Is there anything else you feel would help resolve this situation more effectively? Or anything I might have missed in understanding your perspective?

Our goal is always to maintain PM Mentality as a space where everyone can grow professionally in a supportive environment. Your continued participation is valued, and I'm committed to ensuring your experience aligns with our community values.

I'm available to discuss this further if you'd find that helpful.

[Your Name]

Community Announcement Templates

Important Update

Channel: Community-Wide
Subject: Important Update: Changes to [specific aspect]

❑ IMPORTANT COMMUNITY UPDATE

I'm writing to share an important update regarding [specific aspect of community].

What's changing: [Clear explanation of the change]

Why this change is happening: [Transparent reasoning, connecting to member needs or community goals]

How this affects you: [Specific impacts on different member segments if applicable]

Timeline: • [Date]: [Milestone] • [Date]: [Milestone] • [Date]: [Full implementation]

What you need to do: [Clear action steps if any are required]

Resources to help: • [Resource/Guide link] • [FAQ link] • [Support option]

We understand changes can sometimes be disruptive. If you have questions or concerns, please [specific way to provide feedback].

Thank you for your understanding and continued engagement in our community.

[Your Name]

New Feature or Opportunity

Channel: Community-Wide + Targeted to Relevant Segments
Subject: New: [Feature/Opportunity] Now Available!

□ NEW FOR PM MENTALITY MEMBERS

We're excited to announce the addition of [new feature/opportunity/benefit] to our community!

What it is: [Clear description with visual if applicable]

Key benefits for you: • [Specific benefit] • [Specific benefit] • [Specific benefit]

Why we added this: This addition directly addresses feedback from members who requested [specific need addressed].

How to access/participate: [Clear step-by-step instructions with links]

Expert tip: [Insider advice on getting the most value]

This enhancement is part of our ongoing commitment to [relevant community goal/value].

Questions about how to leverage this new [feature/opportunity]? Ask below!

#CommunityEnhancement #NewFeature

Event Promotion Template

Channel: Community-Wide + Calendar Integration
Subject: Join us: [Event Name] with [Speaker/Host] - [Date]

□ UPCOMING EVENT: [EVENT NAME]

Mark your calendars for an exclusive opportunity to [learn from/engage with/master] [topic/skill]!

Event Details: □ Date: [Day, Date] □ Time: [Time] ([Alternative timezone]) □ Location: [Platform with link] □ Registration: [Process/link]

What you'll gain: • [Specific takeaway] • [Specific takeaway] • [Specific takeaway]

About [Speaker/Host]: [Brief but impressive bio highlighting relevant expertise]

Format: [What to expect: presentation structure, interactive elements, Q&A, etc.]

Ideal for members who: • Are working on [specific challenge] • Want to develop [specific skill] • Need insights on [specific topic]

Preparation suggested: [Any pre-work or thought questions to consider]

Space is limited to [number] participants to ensure quality interaction!

RSVP by: [Date]

#CommunityEvent #[TopicHashtag]

Community Engagement Workflow Automations

This document provides concrete instructions for setting up powerful automations to streamline your community management workflow.

Google Sheets Dashboard Automations

1. Automatic Data Import from Trello

Setup Instructions:

1. Install the Trello Add-on for Google Sheets:
 - In your Community Dashboard Sheet, go to Extensions > Add-ons > Get add-ons
 - Search for "Trello" and install the official add-on

2. Create an import configuration:

=IMPORTTRELLOCARD("Board ID", "List Name", "Optional Card Filter")

3. Set up recurring imports for key metrics:

- In your sheet, go to Extensions > Trello > Schedule Refresh
- Set daily imports of active cards from your experiment boards
- Set weekly imports of completed cards for reporting

2. Conditional Formatting for Metric Monitoring

****Setup Instructions:****

1. Set up health indicators in your Executive Summary tab:

- Select your KPI cells
- Choose Format > Conditional Formatting
- Create rules for:
 - * Green (>=100% of target): Background #b7e1cd
 - * Yellow (80-99% of target): Background #fce8b2
 - * Red (<80% of target): Background #f4c7c3

2. Create trend indicators:

- Select % change columns
- Set conditional formatting:
 - * Positive change: ▲ in green (#0f9d58)
 - * Negative change: ▼ in red (#db4437)
 - * No change: ◆ in gray (#7e7e7e)

3. Automated Weekly Report Generation

****Setup Instructions:****

1. Create a report template in Google Docs

2. Set up Apps Script automation:

- In your Google Sheet, go to Extensions > Apps Script
- Create a new script named "weeklyReportGenerator"
- Paste this code:

```
````javascript
function generateWeeklyReport() {
 // Get the template
 var templateDoc = DocumentApp.openById('YOUR_TEMPLATE_DOC_ID');

 // Create a new doc for this week's report
 var newDoc = DocumentApp.create('PM Mentality Weekly Report - ' + new Date().toDateString());

 // Copy template content to new doc
 var body = newDoc.getBody();
 body.appendParagraph(templateDoc.getBody().getText());

 // Get data from the dashboard
 var sheet = SpreadsheetApp.getActiveSpreadsheet().getSheetByName('Executive Summary');
 var data = sheet.getRange('A1:F10').getValues();

 // Replace placeholders with actual data
 // [Implementation details would follow...]

 // Email the report to team
 var emailTo = "team@example.com";
 var subject = "Weekly PM Mentality Community Report";
 var emailBody = "This week's community report is attached.";
 var pdfReport = newDoc.getAs('application/pdf');

 GmailApp.sendEmail(emailTo, subject, emailBody, {
 attachments: [pdfReport]
 });
}
```

3. Set a time-based trigger:

- o In Apps Script, click Triggers > Add Trigger
- o Choose weekly execution on Friday afternoons


## Trello Workflow Automations

### 1. New Member Onboarding Automation

**Setup Instructions:**

1. In your Member Journey Trello board, click "Automation" > "Create Button"

2. Create a "New Cohort" button:

- o Name: "Create New Member Cohort"
- o Icon: 

3. Set the button actions:

- o Create a card in "New Member Cohort" list
- o Add a standardized checklist:
  - Send welcome messages
  - Create introduction thread
  - Schedule group orientation
  - First-week check-in
  - Add to resource access group

4. Set up a "When card is created in New Member Cohort" trigger:

- o Automatically assign to Community Engagement Specialist
- o Set due date for 1 week from creation
- o Add yellow "Onboarding" label

2. Experiment Pipeline Automation

Setup Instructions:

- 1. Create status change rules:
  - When card moves to "Currently Running":
    - Add "Start Date" to custom field with current date
    - Add standard "Monitoring" checklist
    - Send notification to team channel
- 2. Create measurement reminder:
  - When card has been in "Currently Running" for 7 days:
    - Add comment "Time for mid-experiment check-in"
    - Add yellow "Review Needed" label
    - Notify card owner
- 3. Create results documentation workflow:
  - When card moves to "Analysis Phase":
    - Add "Results Documentation" checklist:
      - Record final metrics
      - Document key findings
      - Identify next steps
      - Update experiment log in Google Sheet
- 4. Integration with dashboard:
  - When "Results" custom field is updated:
    - Run Zapier workflow to update Google Sheet
    - Create card in "This Week's Focus" on Community Management board to implement findings

3. Feedback Collection Automation

Setup Instructions:

- 1. Create recurring feedback cards:
  - Use Butler command:

```
every Monday at 9:00 AM create card "Weekly Feedback Review" in list "Feedback Collection" with description "Gather feedback from team members"
```
- 2. Set up issue escalation workflows:
  - When label "Critical Issue" is added to a card:
    - Move to top of "Blockers & Concerns" list
    - Add all board members as watchers
    - Send notification to leadership channel
    - Create calendar event for review within 24 hours
- 3. Configure feedback closure tracking:
  - When a card moves to "Insights & Actions":

Comprehensive Feedback Collection System

Feedback Framework Overview

Creating a robust feedback ecosystem ensures you're consistently gathering insights while avoiding survey fatigue. This system integrates lightweight pulse checks with deeper investigation opportunities.

Feedback Type	Purpose	Frequency	Format	Target Audience
Micro-Feedback	Quick sentiment capture	Continuous	Emoji reactions, polls	All members
Contextual Feedback	In-the-moment insights	Event-triggered	Quick questions, forms	Participants in specific activities
Relationship Feedback	Personalized insights	Monthly/Quarterly	1:1 conversations	Key members, segment samples
Comprehensive Feedback	Deep understanding	Quarterly	Surveys, focus groups	Representative sample
Exit Feedback	Understanding departure reasons	Upon departure	Survey, conversation	Departing/inactive members

1. Micro-Feedback Templates

Content Reaction System

Implementation: Add to all resource posts, events, and major announcements

Did this [resource/event/update] meet your needs?

☐ Yes! Exactly what I needed

- ☺ Partially useful  
☐ Not quite what I was looking for  
☐ I have a suggestion (comment below)

## Weekly Pulse Poll

**Implementation:** Post each Friday in main community channel

☐ \*\*WEEKLY PULSE CHECK\*\*

How's your PM week been?

- ☐ Productive and on track  
☒ Balanced with some challenges  
☐ Managing through changes  
☐ Putting out fires  
☐ I'd like to share (comment below)

Have a specific challenge or win from this week? Drop it below!

## Quick Value Check

**Implementation:** Rotate through community segments monthly

☐ \*\*QUICK QUESTION\*\*

On a scale of 1-5, how valuable has PM Mentality been to your work in the past month?

- 1 ☐ Not valuable  
2 ☐ Slightly valuable  
3 ☐ Moderately valuable  
4 ☐ Very valuable  
5 ☐ Extremely valuable

If you selected 1-3, what would make it more valuable? (comment below)

## 2. Contextual Feedback Templates

### Post-Event Feedback Card

**Implementation:** Send immediately after event completion

Thanks for joining our [Event Name]!

\*\*In one word, this session was:\*\* [text field]

\*\*The most valuable takeaway was:\*\* [text field]

\*\*For future sessions on this topic, I wish:\*\* [text field]

\*\*I'd rate the practical applicability as:\*\*

- ☐ (5 stars)  
☐ (4 stars)  
☐ (3 stars)  
☐ (2 stars)  
☐ (1 star)

\*\*Would you recommend this session to colleagues?\*\*

- Definitely
- Probably
- Probably not
- Definitely not

### Resource Utilization Follow-up

**Implementation:** Send 7 days after resource access/download

Hi [Name],

You accessed our [Resource Name] last week. We'd love to know:

\*\*Have you had a chance to use this resource?\*\*

- Yes, I've applied it
- I've reviewed it but not applied it yet
- I haven't had a chance to review it yet

\*\*If you've used it, how helpful was it for your specific need?\*\*

- Solved my problem completely
- Partially helpful
- Not quite what I needed

\*\*What would make this resource more useful?\*\*

[text field]

Your feedback helps us improve our resources for everyone!

### Discussion Thread Follow-up

**Implementation:** Send to participants 3 days after active discussion concludes

You recently participated in the discussion on [Topic].

**\*\*Did you get the insights you were looking for?\*\***

- Yes, completely
- Partially
- No, I still have questions

**\*\*What follow-up would be most valuable?\*\***

- More in-depth discussion on specific aspects
- Expert perspective on key questions
- Related resources or templates
- Connection to others with similar challenges
- Other: [text field]

**\*\*Any additional thoughts on how we can make discussions more valuable?\*\***

[text field]

## 3. Relationship Feedback Templates

### 1:1 Feedback Conversation Guide

**Implementation:** Conduct with 5-10 members monthly, rotating through segments

#### Before the Conversation:

- Review member's engagement patterns, contributions, and previous feedback
- Identify specific questions based on their experience
- Schedule 15-30 minutes via direct message

#### Conversation Structure:

Introduction:

"Thanks for taking the time to chat! I'd love to understand your experience with PM Mentality to ensure we're providing rea

Experience Questions:

- "What prompted you to join PM Mentality initially?"
- "What aspects of the community have been most valuable to you so far?"
- "What's been less valuable or perhaps disappointing?"

Specific Value Questions:

- "How has being part of this community impacted your day-to-day PM work?"
- "Have you been able to apply specific insights or resources? Can you share an example?"
- "What PM challenges are you facing that we haven't adequately addressed?"

Future-Focused Questions:

- "What would make this community even more valuable to you over the next 6 months?"
- "Are there specific topics or formats you'd like to see more of?"
- "If you could change one thing about how the community operates, what would it be?"

Closing:

"Thank you for sharing these insights! Is there anything else you'd like me to know that I haven't asked about?"

#### After the Conversation:

- Send thank you message with summary of key points
- Document insights in feedback database
- Tag actionable suggestions for follow-up

### Mentor Experience Check-in

**Implementation:** Quarterly conversation with active mentors

Hi [Mentor Name],

As someone who provides valuable expertise to our community, your perspective is especially important. Could we schedule a

- Your experience as a mentor in the community
- What's working well in how we support your contributions
- What could make mentoring more rewarding/effective
- Ideas for better connecting mentors with mentees
- Any resources that would help you contribute more effectively

Your insights will directly shape how we evolve our mentor support. When might work for a brief conversation this week?

## 4. Comprehensive Feedback Templates

### Quarterly Experience Survey

**Implementation:** See full survey template in separate document

#### Distribution Strategy:

- Direct email with personalized message
- In-platform announcement with link
- Direct message to highly active members
- Follow-up reminder after 5 days



### Incentive Options:

- Early access to new resources
- Recognition in community spotlight
- Entry into drawing for 1:1 with industry expert
- Community contribution badge

### Focus Group Discussion Guide

**Implementation:** Quarterly with 5-8 members from specific segments

#### Invitation Template:

Subject: Invitation to Help Shape PM Mentality's Future

Hi [Name],

Your perspectives as a [role/experience level] in our community are incredibly valuable, and I'd like to invite you to part

Details:

- Date: [Date]
- Time: [Time] ([Time Zone])
- Format: [Platform] video call
- Duration: 60 minutes
- Participants: 5-8 fellow members with diverse perspectives

What we'll discuss:

- Your community experience and how it supports your PM journey
- Specific ways we can improve our resources and interactions
- Ideas for new initiatives that would provide greater value
- How we can better connect members with complementary needs/expertise

As a thank you for your time, we'll [incentive details].

Can you join us? Please let me know by [deadline], and I'll send the calendar invitation with connection details.

Looking forward to your insights!

[Your Name]

#### Focus Group Structure:

1. Welcome and introductions (10 min)
  - Facilitator introduction
  - Participant introductions (name, role, how long in community)
  - Session purpose and ground rules
2. Current experience discussion (15 min)
  - What's working well
  - What's not meeting expectations
  - Specific examples of value received
3. Future-focused ideation (20 min)
  - Gaps in current offerings
  - Ideas for new initiatives
  - Prioritization discussion
4. Connection and community discussion (10 min)
  - Current relationship building experience
  - Barriers to meaningful connections
  - Ideas for better facilitating relationships
5. Wrap-up and next steps (5 min)
  - Summary of key insights
  - How feedback will be used
  - Timeline for implementation

## 5. Exit & Inactivity Feedback Templates

### Declining Engagement Follow-up

**Implementation:** Triggered when previously active member shows 30 days of decreased activity

Subject: We've missed seeing you in PM Mentality

Hi [Name],

I noticed you've been less active in PM Mentality recently, and I wanted to check in. Your contributions have been valuable

I'd appreciate understanding if there's a reason for the change:

- Has your availability or work situation changed?

- Is the community still addressing your current PM needs?
- Have you found the recent content/discussions less relevant?
- Is there something specific that could better support you right now?

Even a quick one-line response would be helpful as we work to make the community valuable for all members.

If you'd prefer a quick chat instead, I'm happy to connect briefly via [platform].

Thanks for being part of PM Mentality,

[Your Name]

## Formal Exit Survey

**Implementation:** Sent when member formally leaves or after 90 days of inactivity

Subject: Your PM Mentality Experience - Brief Feedback Request

Hi [Name],

We noticed you've [left our community/been inactive for some time] and would value understanding your experience to help us

If you could take just 2 minutes to share your thoughts, it would be incredibly helpful:

1. What initially brought you to PM Mentality?  
[text field]
2. What best describes your reason for leaving/becoming less active?
  - I got what I needed and moved on
  - My professional focus has changed
  - The content wasn't relevant to my needs
  - The community dynamic wasn't what I expected
  - Time constraints prevented participation
  - Found another resource that better met my needs
  - Other: [text field]
3. What one change would have made the community more valuable for you?  
[text field]
4. Is there anything else you'd like us to know?  
[text field]

Thank you for your time. Your feedback will directly inform how we evolve the community.

All the best with your PM journey,

[Your Name]

## Feedback Analysis Framework

### Weekly Synthesis Process

#### 1. Collection & Categorization

- Gather all feedback from the week across all channels
- Tag by source, feedback type, topic area, and sentiment
- Identify member segment associated with each feedback point

#### 2. Pattern Identification

- Group similar feedback points
- Identify emerging trends vs. one-off comments
- Note patterns specific to member segments

#### 3. Impact Assessment

- Evaluate each feedback theme for:
  - How many members it affects
  - Potential impact on engagement if addressed
  - Resources required to address
  - Alignment with community goals

#### 4. Action Planning

- Categorize feedback as:
  - Quick wins (implement immediately)
  - Strategic initiatives (plan for implementation)
  - Long-term considerations (further investigation needed)
  - Outside current scope (document but defer)

#### 5. Closing the Loop

- Document feedback received and actions taken
- Communicate changes made based on feedback
- Acknowledge contributors whose feedback led to changes

## Monthly Feedback Report Template

```

PM Mentality Feedback Insights: [Month]

Key Metrics
- Total feedback points collected: [#]
- Sources: [Breakdown by channel]
- Sentiment distribution: [Positive/Neutral/Negative percentages]
- Member segments represented: [Breakdown by segment]

Top Themes

Theme 1: [Title]
- Frequency: [# of mentions]
- Key quote: "[Representative feedback]"
- Member segments: [Which groups mentioned this most]
- Sentiment: [Positive/Neutral/Negative]
- Potential impact: [High/Medium/Low]
- Recommended action: [Specific next steps]

Theme 2: [Title]
[Same structure]

Theme 3: [Title]
[Same structure]

Implementation Updates

Actions Completed This Month
- [Action taken] in response to [feedback theme]
- [Action taken] in response to [feedback theme]

In Progress
- [Action] - Targeted completion: [date]
- [Action] - Targeted completion: [date]

Planned for Next Month
- [Action] in response to [feedback theme]
- [Action] in response to [feedback theme]

Closing the Loop
- Feedback acknowledgments sent to [# members]
- Public updates communicated via [channels]
- Next comprehensive survey planned for [date]

```

## 5. Feedback Collection Templates (Continued)

### In-Depth Member Interview Guide

**Purpose:** Gain deeper qualitative insights from members to inform strategic decisions

#### Pre-Interview Communication

**Channel:** Direct Message or Email

**Subject:** Invitation: Help shape PM Mentality through a 20-min conversation

Hi [Name],

Your perspective as a [specific description: "active mentor," "new member," etc.] in our PM Mentality community is incredibly valuable. Your engagement with [specific aspect of community] gives you a unique viewpoint that can help us enhance the experience for everyone.

What we'll discuss:

- Your PM journey and how the community fits into it
- What's working well for you and what could be improved
- Specific ideas you might have for new resources or features

You can book a time that works for you here: [Calendly link]

Your candid feedback will directly inform our roadmap for the next quarter, helping ensure PM Mentality delivers exactly what you need.

Thank you for considering this invitation!

[Your Name]

#### Interview Question Framework

##### Opening (2 minutes):

- "Thanks so much for making time for this conversation. Before we dive in, do you have any questions about how we'll use your feedback?"
- "Just to set expectations, I'll be taking notes, and your insights will be summarized along with other member feedback to identify patterns, but no direct quotes will be attributed to you without permission."

##### Journey & Context (5 minutes):

1. "Could you briefly tell me about your project management journey and what prompted you to join PM Mentality?"
2. "What were you hoping to gain from the community when you joined? How has that evolved?"
3. "How does PM Mentality fit into your professional development routine?"

##### Experience Deep-Dive (7 minutes):

1. "Thinking about your experience so far, what aspects of the community have been most valuable to you?"
2. "What's one thing that has surprised you (positively or negatively) about the community?"
3. "If you could change or improve one thing about PM Mentality, what would it be and why?"
4. "Are there any specific challenges in your PM work that the community isn't currently helping you address?"

**Future-Focused (5 minutes):**

1. "What types of resources or interactions would make PM Mentality even more valuable to your professional growth?"
2. "How do you see your participation in the community evolving over the next 6-12 months?"
3. "If we were to introduce one new feature or type of content, what would you find most beneficial?"

**Closing (1 minute):**

- "Is there anything else you'd like to share that I haven't asked about?"
- "Thank you so much for your insights. They'll be incredibly helpful as we continue to evolve the community."
- "Would it be alright if I reached out with any follow-up questions? And would you be interested in hearing about changes we implement based on this feedback?"

## Post-Interview Thank You

**Channel:** Email or Direct Message

**Subject:** Thank you for sharing your PM Mentality insights

Hi [Name],

I wanted to extend my sincere thanks for taking the time to share your perspectives on PM Mentality today. Your insights ab

A few key takeaways I noted from our conversation:

- [Specific insight they shared]
- [Another point they emphasized]
- [A need or opportunity they identified]

We're collecting feedback from several members this month, and will be incorporating these insights into our planning for [

If any additional thoughts come to mind, please don't hesitate to share them with me directly.

Thanks again for helping us build a stronger PM Mentality community!

[Your Name]

## Focused Feedback Campaign Templates

### Feature-Specific Feedback

**Channel:** Direct to Recent Users

**Subject:** Your thoughts on [specific feature]?

Hi [Name],

I noticed you've recently engaged with our [specific feature/resource/event], and I'd love to get your quick take on it whi

☐ \*\*60-Second Feedback\*\*

1. On a scale of 1-5, how useful was this [feature] for you? [1☐2☐3☐4☐5☐]
2. What was the most valuable aspect? [Short answer]
3. One thing that would make it even better? [Short answer]

Your input helps us refine our resources to better serve your PM needs. We're particularly focused on improving [specific a

Thanks for being part of making PM Mentality better!

[Your Name]

### Exit Survey Template

**Channel:** Email

**Subject:** We'd value your feedback as you leave PM Mentality

Hi [Name],

We've noticed you're no longer active in the PM Mentality community, and while we're sad to see you go, we respect your dec

If you could take just 2 minutes to answer a few questions, it would be greatly appreciated:

1. What initially attracted you to PM Mentality?  
[Short answer field]
2. What factors influenced your decision to step away?
  - [ ] Time constraints
  - [ ] Content not relevant to my needs
  - [ ] Community dynamic not what I expected
  - [ ] Found alternative resources elsewhere
  - [ ] Professional circumstances changed
  - [ ] Other: \_\_\_\_\_

3. Is there anything we could have done differently that would have made PM Mentality more valuable for you?

[Short answer field]

4. Would you consider rejoining if specific changes were made?
- ☐ Yes
  - ☐ No
  - ☐ Maybe

Thank you for your time with us, and for any insights you're willing to share. Regardless of your feedback, we wish you all

[Your Name]

## Topic Interest Survey

**Channel:** Community-Wide

**Subject:** Help shape our upcoming content focus

☐ **\*\*QUICK CONTENT POLL\*\***

We're planning our resource development calendar for the next quarter, and want to focus on what matters most to YOU.

**\*\*Which PM topics would you most value deeper resources on?\*\***  
(Select up to 3)

- ☐ Risk management strategies
- ☐ Stakeholder communication techniques
- ☐ Agile implementation in traditional environments
- ☐ Resource allocation optimization
- ☐ Remote team management
- ☐ PM tool configuration and workflows
- ☐ Career progression and certification
- ☐ Metrics and reporting frameworks
- ☐ Other: \_\_\_\_\_

**\*\*What format works best for your learning style?\*\***

- ☐ Comprehensive guides
- ☐ Template collections
- ☐ Case studies
- ☐ Quick reference tools
- ☐ Interactive workshops
- ☐ Peer discussion threads
- ☐ Expert interviews
- ☐ Other: \_\_\_\_\_

Your input directly determines what we prioritize next. Thanks for guiding our focus!

Poll closes: [Date]

## Ongoing Feedback Systems

### Weekly Pulse Check

**Channel:** Rotating Channel Each Week

**Subject:** Friday Pulse Check: This week in PM Mentality

Happy Friday, PM community! ☐

As we wrap up another week, I'd love to get your quick thoughts:

**\*\*This week's highlights:\*\***

- [Community achievement/milestone]
- [Popular discussion or resource]
- [Upcoming opportunity]

**\*\*Quick reflection questions:\*\***

- 1 ☐ What was the most useful thing you encountered in the community this week?
- 2 ☐ Any challenges or questions that remain unresolved?
- 3 ☐ One word to describe your PM Mentality experience this week?

These weekly check-ins help us stay responsive to your needs. Even a quick emoji reaction helps!

Have a productive weekend,  
[Your Name]

### Feedback Collection Board

**Channel:** Dedicated Feedback Channel

**Subject:** Continuous Improvement Board - Share Your Ideas

☐ **\*\*PINNED: CONTINUOUS IMPROVEMENT BOARD\*\***

This is our always-open space for community suggestions and feedback. Your input directly shapes PM Mentality!

**\*\*How to participate:\*\***

☐ **\*\*Share an idea\*\*** by commenting with "IDEA: [your suggestion]"  
Example: "IDEA: Create a resource library section specifically for stakeholder templates"

☐ **\*\*Upvote existing ideas\*\*** that resonate with you by adding a ☐ reaction

□ **\*\*Submit feedback\*\*** by commenting with "FEEDBACK: [your experience]"  
Example: "FEEDBACK: The mentor matching process was smooth, but I'd appreciate more guidance on setting expectations"

Every two weeks, we review all submissions and will update this thread with actions we're taking based on your input.

Currently working on:

- [Current improvement initiative]
- [Current improvement initiative]
- [Current improvement initiative]

Recently implemented based on your feedback:

- [Completed improvement]
- [Completed improvement]

Thank you for helping us build a better PM Mentality community together!

## Targeted Improvement Request

**Channel:** Direct Message or Specific Channel

**Subject:** Help us improve [specific aspect]

Hi [Name/Channel],

We're currently focusing on enhancing our [specific aspect: onboarding process, resource organization, mentorship program,

**\*\*What we're trying to improve:\*\***  
[Brief explanation of current state and why improvement matters]

**\*\*Quick questions:\*\***

1. What currently works well about our [specific aspect]?
2. What's your biggest friction point or challenge with it?
3. If you could wave a magic wand and change one thing about this, what would it be?
4. Any examples you've seen elsewhere that we might learn from?

Your practical experience with this aspect of our community makes your perspective essential. Even a sentence or two would

We'll be collecting feedback until [date] and will share our action plan by [date].

Thank you for contributing to our improvement!

[Your Name]

# 6. Member Success & Recognition Templates

## Achievement Recognition

**Channel:** Community-Wide + Direct Message

**Subject:** Celebrating [Name]'s PM Success!

□ **\*\*MEMBER SPOTLIGHT\*\***

Join me in celebrating @[Member Name]'s recent achievement!

[Name] recently [specific accomplishment: completed certification, delivered successful project, reached milestone, shared

In their own words:  
"[Brief quote from member about their experience/achievement]"

[Name] has been contributing to our community by [specific contributions: sharing insights, helping others, creating resour

Want to wish [Name] congratulations? Drop a comment below!

#MemberSpotlight #PMSuccess

## Personal Congratulations Note

**Channel:** Direct Message

**Subject:** Congratulations on your [specific achievement]!

Hi [Name],

I just heard about your [specific achievement], and wanted to personally congratulate you! This is an impressive accomplish

Our entire community benefits from having committed professionals like you who [specific value they bring]. I particularly

Would you be comfortable with me highlighting this achievement in our community channels? It could inspire other members an

Also, I'd love to hear more about how this achievement connects to your broader professional goals, if you're open to shari

Congratulations again!

[Your Name]

## Contribution Recognition

**Channel:** Community-Wide + Direct Message  
**Subject:** Thank you, [Name], for elevating our community!

□ **\*\*COMMUNITY CHAMPION\*\***

This week, we want to recognize @[Member Name] for their outstanding contributions to PM Mentality!

[Name] has consistently [specific contributions: answered questions, shared resources, provided thoughtful feedback, etc.]

**\*\*Impact highlights:\*\***

- [Specific example of impact]
- [Another example or quantifiable contribution]
- [Member testimonial if available]

These contributions embody our community values of [relevant values] and help make PM Mentality a place where everyone can

Thank you, [Name], for all you do to elevate our community!

#CommunityChampion #MemberAppreciation

## Impact Documentation

**Channel:** Direct Message  
**Subject:** The impact you're making in PM Mentality

Hi [Name],

I wanted to take a moment to share the impact your contributions are making in our community:

- Your [specific contribution] has helped [number] members with [specific challenge]
- The [resource/insight] you shared has become one of our most [referenced/saved/discussed] resources
- Several members have specifically mentioned how your [approach/support/content] has helped them, including:

"[Quote from member]" - @MemberName

This kind of contribution directly supports our mission to [community mission statement] and creates real value for PM prof

Is there anything I can do to support your continued engagement or make your experience in the community even better?

With sincere appreciation,

[Your Name]

## Milestone Celebrations

**Channel:** Community-Wide  
**Subject:** Celebrating [X months/years] with PM Mentality!

□ **\*\*MILESTONE CELEBRATION\*\***

Today marks an important milestone for our community members who joined us [timeframe] ago!

**\*\*Celebrating:\*\***

[Tag members celebrating milestone]

In the past [timeframe], these members have:

- Participated in [number] discussions
- Contributed [number] resources
- Supported countless peers
- Grown their PM capabilities

**\*\*Member Reflections:\*\***

[Name]: "[Brief quote about their experience]"

[Name]: "[Brief quote about their experience]"

What's been your most valuable takeaway from PM Mentality so far? Share in the comments!

Thank you for being part of our community journey!

#PMGrowth #CommunityMilestone

## Personal Milestone Recognition

**Channel:** Direct Message  
**Subject:** Happy [X] Month/Year Anniversary with PM Mentality!

Hi [Name],

Today marks [X months/years] since you joined our PM Mentality community - what a journey it's been!

I've personally noticed how you've [specific observation about their growth or contribution]. Your presence has enriched ou

Looking back:

- You've engaged with [specific metrics if available]
- You've helped others by [specific contributions]
- You've grown in [observed areas of development]

I'd love to hear: What's been most valuable about PM Mentality for you? And what would you like to gain from the community

Thanks for being an important part of what makes this community special.

Here's to many more productive conversations ahead!

[Your Name]

## 7. Community Culture & Values Templates

### Culture Reinforcement

**Channel:** Community-Wide

**Subject:** Our PM Mentality Values in Action

□ **\*\*COMMUNITY VALUES SPOTLIGHT\*\***

This week, I've been reflecting on our core value of [specific value], which means [brief description of what the value rep

**\*\*I've seen this value beautifully demonstrated through:\*\***

- @MemberName showing [value] by [specific example]
- The thoughtful discussion in [channel/thread] where members [specific behavior]
- How our community responded to [situation/challenge] with [value-aligned behavior]

These moments aren't just nice to see—they're what make PM Mentality a uniquely supportive space for professional growth.

**\*\*Question for reflection:\*\*** How has embodying this value helped you in your broader PM practice beyond our community?

Share your thoughts below, or an example of how you've seen this value in action recently!

#CommunityValues #[ValueName]

### Values Integration Message

**Channel:** New Member Onboarding Material

**Subject:** The PM Mentality Difference: Our Community Values

Welcome to PM Mentality!

What makes our community special isn't just what we discuss, but how we engage with each other. Our community values guide

□ **\*\*Supportive Growth\*\***

We believe the best learning happens when we lift each other up. This means:

- Constructive feedback focused on improvement
- Celebrating wins of all sizes
- Meeting members where they are in their PM journey

□ **\*\*Curious Mindset\*\***

We embrace continuous learning and thoughtful questioning:

- Asking "why" and "how" rather than just "what"
- Sharing perspectives across methodologies and industries
- Challenging assumptions respectfully

□ **\*\*Ambitious Application\*\***

We focus on practical impact and real-world results:

- Translating concepts into actionable steps
- Sharing both successes and failures as learning opportunities
- Holding each other accountable to meaningful goals

You'll see these values in action throughout our channels, events, and resources. We invite you to both embrace and help sh

Have questions about how these values play out in specific situations? Feel free to ask me directly anytime.

### Behavior Modeling

**Channel:** Community-Wide or Specific Channel

**Subject:** How we handle [specific situation] in PM Mentality

□ **\*\*COMMUNITY PRACTICE SPOTLIGHT\*\***

I've noticed several questions about how to approach [specific situation: disagreements, knowledge gaps, sensitive topics,

**\*\*Our approach to [situation]:\*\***

□ **\*\*What works well:\*\***

- [Specific constructive approach]
- [Specific constructive approach]
- [Specific constructive approach]

Example: [Brief scenario demonstrating positive approach]

□ **\*\*What we avoid:\*\***

- [Approach that doesn't align with values]
- [Approach that doesn't align with values]
- [Approach that doesn't align with values]

**\*\*Why this matters:\*\***

[Brief explanation of how this approach supports community goals and individual growth]

I've been particularly impressed by how @MemberName and @MemberName have exemplified this recently in [specific example if

Questions about navigating this or other community dynamics? Feel free to ask here or message me directly.



#CommunityGuidelines #ProfessionalGrowth

## Constructive Resolution Template

**Channel:** Direct Message or Private Thread

**Subject:** Following up on [specific situation]

Hi [Name],

I wanted to reach out regarding the recent [discussion/interaction] in [channel/thread]. First, I want to thank you for you

I noticed that the conversation [specific observation about what happened], and wanted to check in. In PM Mentality, we str

Some thoughts on how we might approach this productively:

- [Specific suggestion]
- [Specific suggestion]
- [Specific suggestion]

My role is to ensure everyone feels both challenged to grow AND supported in that process. What are your thoughts on how we

I'm happy to discuss this further if you'd like—my goal is always to maintain the positive, growth-focused culture that mak

[Your Name]

# 8. Program Development Templates

## Needs Assessment

**Channel:** Community-Wide Survey or Targeted Segments

**Subject:** Help shape our upcoming [program/initiative]

□ **PROGRAM DEVELOPMENT SURVEY**

We're developing a new [program/initiative] focused on [specific area], and your input will directly shape what we create!

**Quick Background:**

We've observed [specific need/trend] in our community, and want to ensure we're addressing it effectively.

**Please share your thoughts:**

1. How important is [specific area] to your PM work? (Scale 1-5)

2. What specific challenges do you face with [area]?

- [ ] [Common challenge]
- [ ] [Common challenge]
- [ ] [Common challenge]
- [ ] [Common challenge]
- [ ] Other: \_\_\_\_\_

3. What would make a [program/initiative] on this topic truly valuable to you?  
[Short answer]

4. How would you prefer to engage with this content?

- [ ] Self-paced resources
- [ ] Guided cohort experience
- [ ] Live workshops
- [ ] Peer accountability groups
- [ ] Expert Q&A sessions
- [ ] Other: \_\_\_\_\_

5. Would you be interested in contributing to this initiative as a [content reviewer/subject matter expert/discussion leade  
[ ] Yes  
[ ] No  
[ ] Maybe, tell me more

Survey closes: [Date]

We'll share what we learn and our program plan by: [Date]

#CommunityInput #ProgramDevelopment

## Program Launch Announcement

**Channel:** Community-Wide + Targeted Outreach

**Subject:** Introducing: [Program Name] - Developed with YOUR input

□ **LAUNCHING: [PROGRAM NAME]**

Today, we're excited to introduce [Program Name], a new initiative designed with direct input from community members like y

**What it is:**

[Program Name] is a [brief description] designed to help you [specific benefit].

**How we created it:**

- Started with feedback from [number] community members
- Identified key needs around [specific challenges]
- Developed and tested with a pilot group
- Refined based on implementation feedback

**What you'll gain:**

- [Specific benefit]
- [Specific benefit]
- [Specific benefit]

**\*\*How to participate:\*\***  
[Clear next steps with links]

**\*\*Timeline:\*\***  
[Key dates and deadlines]

Special thanks to @Member1, @Member2, and @Member3 who contributed valuable insights during development!

Questions? Drop them below or DM me directly.

#NewProgram #[ProgramHashtag]

## Program Feedback Collection

**Channel:** Program Participants

**Subject:** Your thoughts on [Program Name]?

Hi [Name],

Now that you've experienced [Program Name], your feedback is crucial to help us refine and improve it for future participan

**\*\*Quick Reflection Questions:\*\***

1. Overall, how valuable was this program to your PM development? (Scale 1-5)

2. What aspect of the program was MOST valuable to you?  
[Short answer]

3. What aspect was LEAST valuable or could be improved?  
[Short answer]

4. Have you been able to apply what you learned? If so, how?  
[Short answer]

5. Would you recommend this program to other community members?  
[ ] Definitely  
[ ] Probably  
[ ] Not sure  
[ ] Probably not  
[ ] Definitely not

6. Any additional suggestions for improvement?  
[Short answer]

Your honest feedback helps us create truly impactful programming. All responses will be reviewed carefully as we plan futur

Thank you for being part of this journey!

[Your Name]

## 9. Crisis & Sensitive Situation Templates

### Issue Response

**Channel:** Affected Area + Direct to Involved Parties

**Subject:** Addressing recent concerns about [topic/situation]

Hi everyone,

I want to address the recent [discussion/situation] regarding [brief, neutral description].

First, thank you to those who brought this to our attention. Open communication helps us maintain a community that works fo

**\*\*What happened:\*\***  
[Factual, neutral summary without assigning blame]

**\*\*Our approach:\*\***  
At PM Mentality, we're committed to [relevant community value/guideline]. In this situation, we're taking the following ste

1. [Specific action being taken]
2. [Specific action being taken]
3. [Specific action being taken]

**\*\*Moving forward:\*\***  
To prevent similar situations, we'll be [preventative measure]. We also welcome your suggestions on how we can better [addr

If you have concerns or questions about this or any community matter, please don't hesitate to reach out to me directly.

Thank you for your understanding and continued engagement in making PM Mentality a valuable space for everyone.

[Your Name]

### Private Follow-Up

**Channel:** Direct Message

**Subject:** Following up on recent situation

Hi [Name],

I wanted to check in with you personally regarding the recent [situation] in our community. Your experience and perspective

First, I want to thank you for [positive action they took: raising concern, showing patience, offering solution, etc.].

I understand this situation may have been [challenging/frustrating/concerning], and I want to ensure you feel heard and sup

- [Specific action taken]
- [Specific action taken]
- [Specific action taken]

Is there anything else you feel would help resolve this situation more effectively? Or anything I might have missed in unde

Our goal is always to maintain PM Mentality as a space where everyone can grow professionally in a supportive environment.

I'm available to discuss this further if you'd find that helpful.

[Your Name]

## Community Announcement Templates

### Important Update

**Channel:** Community-Wide

**Subject:** Important Update: Changes to [specific aspect]

□ **\*\*IMPORTANT COMMUNITY UPDATE\*\***

I'm writing to share an important update regarding [specific aspect of community].

**\*\*What's changing:\*\***

[Clear explanation of the change]

**\*\*Why this change is happening:\*\***

[Transparent reasoning, connecting to member needs or community goals]

**\*\*How this affects you:\*\***

[Specific impacts on different member segments if applicable]

**\*\*Timeline:\*\***

- [Date]: [Milestone]
- [Date]: [Milestone]
- [Date]: [Full implementation]

**\*\*What you need to do:\*\***

[Clear action steps if any are required]

**\*\*Resources to help:\*\***

- [Resource/Guide link]
- [FAQ link]
- [Support option]

We understand changes can sometimes be disruptive. If you have questions or concerns, please [specific way to provide feedb

Thank you for your understanding and continued engagement in our community.

[Your Name]

### New Feature or Opportunity

**Channel:** Community-Wide + Targeted to Relevant Segments

**Subject:** New: [Feature/Opportunity] Now Available!

□ **\*\*NEW FOR PM MENTALITY MEMBERS\*\***

We're excited to announce the addition of [new feature/opportunity/benefit] to our community!

**\*\*What it is:\*\***

[Clear description with visual if applicable]

**\*\*Key benefits for you:\*\***

- [Specific benefit]
- [Specific benefit]
- [Specific benefit]

**\*\*Why we added this:\*\***

This addition directly addresses feedback from members who requested [specific need addressed].

**\*\*How to access/participate:\*\***

[Clear step-by-step instructions with links]

**\*\*Expert tip:\*\***

[Insider advice on getting the most value]

This enhancement is part of our ongoing commitment to [relevant community goal/value].

Questions about how to leverage this new [feature/opportunity]? Ask below!

#CommunityEnhancement #NewFeature

### Event Promotion Template

**Channel:** Community-Wide + Calendar Integration  
**Subject:** Join us: [Event Name] with [Speaker/Host] - [Date]

□ **\*\*UPCOMING EVENT:** [EVENT NAME]\*\*

Mark your calendars for an exclusive opportunity to [learn from/engage with/master] [topic/skill]!

**\*\*Event Details:\*\***

□ **Date:** [Day, Date]  
□ **Time:** [Time] ([Alternative timezone])  
□ **Location:** [Platform with link]  
□ **Registration:** [Process/link]

**\*\*What you'll gain:\*\***

- [Specific takeaway]
- [Specific takeaway]
- [Specific takeaway]

**\*\*About [Speaker/Host]:\*\***

[Brief but impressive bio highlighting relevant expertise]

**\*\*Format:\*\***

[What to expect: presentation structure, interactive elements, Q&A, etc.]

**\*\*Ideal for members who:\*\***

- Are working on [specific challenge]
- Want to develop [specific skill]
- Need insights on [specific topic]

**\*\*Preparation suggested:\*\***

[Any pre-work or thought questions to consider]

Space is limited to [number] participants to ensure quality interaction!

**\*\*RSVP by:\*\*** [Date]

#CommunityEvent #[TopicHashtag]

# PM Mentality Community Feedback Survey

## Introduction Section

Thank you for being part of the PM Mentality community. This survey will take approximately 5-7 minutes to complete and will help us create the most valuable experience possible for you and your project management journey.

Your honest feedback is incredibly valuable to us. All responses are confidential and will be used to improve our community offerings.

## Community Experience

### 1. Overall, how satisfied are you with your PM Mentality community experience?

- Extremely satisfied
- Very satisfied
- Somewhat satisfied
- Not very satisfied
- Not at all satisfied

### 2. How likely are you to recommend PM Mentality to a colleague or friend?

- 0-10 scale (0 = Not at all likely, 10 = Extremely likely)

### 3. How often do you engage with the PM Mentality community?

- Daily
- Several times a week
- About once a week
- A few times a month
- Monthly or less
- I haven't engaged yet

### 4. What typically prevents you from engaging more frequently? (Select all that apply)

- Time constraints
- Content doesn't always meet my needs
- I'm not sure where or how to contribute
- Lack of responses to my contributions
- Platform navigation challenges
- Nothing - my current engagement level works for me
- Other (please specify): \_\_\_\_\_

## Content & Resources

### 5. Which content formats do you find most valuable? (Rank from most to least valuable)

- Written guides and templates
- Interactive workshops/webinars
- Discussion threads on specific topics
- Q&A sessions with mentors
- Peer case studies and examples
- Structured courses or learning paths
- Other (please specify): \_\_\_\_\_

**6. Which project management topics are you most interested in learning about?** (Select up to 3)

- Agile methodologies
- Traditional/Waterfall approaches
- Hybrid methodologies
- Team leadership and management
- Stakeholder communication
- Risk management
- Resource planning and allocation
- PM tools and technology
- Career development and advancement
- Industry-specific PM approaches
- Other (please specify): \_\_\_\_\_

**7. How would you rate the quality of our community resources?**

- Excellent
- Very good
- Good
- Fair
- Poor

**8. What specific resources or content would you like to see that we don't currently offer?**

- [Open text field]

## Community Interactions

**9. How would you describe the community culture?** (Select all that apply)

- Supportive
- Knowledgeable
- Responsive
- Welcoming
- Diverse
- Engaging
- Challenging (in a positive way)
- Intimidating
- Slow to respond
- Cliquish
- Other (please specify): \_\_\_\_\_

**10. How useful have interactions with other community members been for your PM growth?**

- Extremely useful
- Very useful
- Somewhat useful
- Not very useful
- Not at all useful
- I haven't interacted with other members yet

**11. What would make community interactions more valuable for you?**

- [Open text field]

## Platform Experience

**12. How easy is it to find what you need within our community platforms?**

- Extremely easy
- Very easy
- Somewhat easy
- Not very easy
- Not at all easy

**13. Which platforms do you most frequently use to engage with the community?** (Select all that apply)

- Slack
- Discord
- LinkedIn
- Coda
- Trello
- Other (please specify): \_\_\_\_\_

14. What specific improvements to our platforms would enhance your experience?

- [Open text field]

## Personal Value & Growth

15. What specific PM skills have you improved through your participation in this community?

- [Open text field]

16. What is the primary value you get from the PM Mentality community?

- Professional networking
- Learning new PM approaches and skills
- Finding solutions to specific work challenges
- Validating my current PM practices
- Career advancement opportunities
- Mentor/mentee relationships
- Other (please specify): \_\_\_\_\_

17. What additional value would you like to receive that you're not getting currently?

- [Open text field]

## Future Directions

18. Which of the following initiatives would you like to see us implement? (Select all that interest you)

- Structured mentorship program
- Certification study groups
- Industry-specific PM discussions
- Project showcases from members
- Career development workshops
- Tool-specific training
- Regular virtual networking events
- Community challenges/hackathons
- Other (please specify): \_\_\_\_\_

19. How can we better support your specific PM career stage and goals?

- [Open text field]

## Final Thoughts

20. If you could change one thing about the PM Mentality community, what would it be?

- [Open text field]

21. Is there anything else you'd like to share about your community experience?

- [Open text field]

## Demographic Questions (Optional)

22. How long have you been a member of the PM Mentality community?

- Less than 1 month
- 1-3 months
- 4-6 months
- 7-12 months
- Over 1 year

23. Which best describes your current PM experience level?

- New to project management (0-1 years)
- Early career (2-3 years)
- Mid-level (4-7 years)
- Experienced (8-15 years)
- Senior/leadership level (15+ years)

24. Which industry do you primarily work in?

- Technology/Software
- Financial Services
- Healthcare
- Manufacturing
- Construction
- Education
- Government
- Consulting

◦ Other (please specify): \_\_\_\_\_

Thank you for taking the time to provide your feedback! Your insights will directly inform our community improvements.

# PM Mentality Member Onboarding Workflow

## Onboarding Journey Map

### Pre-Onboarding Phase

**Objective:** Set clear expectations and build excitement before official welcome

Touchpoint	Channel	Owner	Goal	Content	Timing
Confirmation Email	Email	Auto/System	Confirm registration & set expectations	Welcome message, what to expect, immediate access instructions	Immediately after signup
Welcome Guide	PDF/Doc	Community Lead	Provide comprehensive overview	Community purpose, platforms, benefits, getting started guide	Attached to confirmation email
Quick Start Checklist	PDF/Doc	Community Lead	Provide clear first steps	Top 3-5 actions to take immediately	Attached to confirmation email

### Day 1: Welcome & Orientation

**Objective:** Make new member feel personally welcomed and help them take first engagement steps

Touchpoint	Channel	Owner	Goal	Content	Timing
Personal Welcome	Direct Message	Engagement Specialist	Establish human connection	Personalized welcome, offer to answer questions	Within 24 hours of joining
Platform Tour	System Message or Video	Auto/System	Orient to digital environment	Navigation guidance, feature highlights	Triggered after first login
Introduction Prompt	Community Channel	Engagement Specialist	Facilitate first engagement	Template for self-introduction, encouragement to post	Day 1
Resource Orientation	Direct Message	Engagement Specialist	Direct to initial resources	Personalized recommendations based on stated interests	Day 1

### Days 2-7: First Engagement

**Objective:** Guide new member to meaningful interactions and value realization

Touchpoint	Channel	Owner	Goal	Content	Timing
Introduction Follow-up	Community Channel	Engagement Specialist	Acknowledge their introduction	Welcome response, specific follow-up question, tag relevant members	Within 24 hours of introduction
First Check-in	Direct Message	Engagement Specialist	Address questions, provide guidance	Quick check on experience, address any confusion	Day 3
Resource Recommendation	Direct Message	Engagement Specialist	Drive resource utilization	Personalized content based on stated interests	Day 5
Engagement Prompt	Direct Message	Engagement Specialist	Encourage specific participation	Suggestion to join specific discussion, event, or resource	Day 7

### Days 8-30: Deepening Engagement

**Objective:** Transform from newcomer to active participant with connection to community

Touchpoint	Channel	Owner	Goal	Content	Timing
Connection Suggestions	Direct Message	Engagement Specialist	Facilitate peer relationships	Introduction to 2-3 members with similar interests	Day 10-14
Feedback Check	Direct Message	Engagement Specialist	Gather early experience data	Quick 3-question check on experience so far	Day 14
Value Highlight	Direct Message	Engagement Specialist	Reinforce benefits	Spotlight specific resource/conversation relevant to their needs	Day 21
Contribution Invitation	Direct Message	Engagement Specialist	Encourage active participation	Specific invitation to contribute expertise/insight	Day 25-30
Month 1 Milestone	Direct Message	Engagement Specialist	Celebrate participation	Acknowledgment of 1-month mark, recap engagement, suggest next steps	Day 30

### Month 2: Path to Core Membership

**Objective:** Transition from guided experience to self-directed engagement and deeper contribution

Touchpoint	Channel	Owner	Goal	Content	Timing
Deeper Engagement Option	Direct Message	Engagement Specialist	Suggest meaningful participation	Specific role or contribution opportunity	Week 5-6

Touchpoint	Channel	Owner	Goal	Content	Timing
Expertise Identification	Direct Message	Engagement Specialist	Recognize unique value	Acknowledgment of specific expertise, suggestion for sharing	Week 6-7
Structured Feedback	Survey	Engagement Specialist	Gather comprehensive feedback	Formal onboarding experience survey	End of Month 2

## Onboarding Workflow Implementation

### 1. Automate Where Valuable (Not Everywhere)

#### System-Based Automations:

- Confirmation email with welcome guide
- Platform feature introduction messages
- Scheduled check-in reminders for Engagement Specialist
- Membership milestone acknowledgments

#### Keep Human Touch For:

- Personal welcome messages
- Follow-up on introductions
- Custom resource recommendations
- Connection facilitation

### 2. Personalization Framework

#### Data Collection Points:

- Initial signup form: Role, experience level, primary interests
- Introduction post: Background, goals, challenges
- Early engagement patterns: Content types, discussion topics
- Direct feedback from check-ins

#### Personalization Application:

- Resource recommendations based on stated interests and role
- Connection suggestions based on experience level and goals
- Engagement prompts aligned with observed platform preferences
- Contribution invitations matching expertise areas

### 3. Success Metrics Tracking

#### Individual Member Level:

- Days to first engagement post-signup
- Platform navigation completeness
- Resource utilization in first 30 days
- Connection formation (interactions with other members)
- Progression to contribution activities

#### Program Level:

- Percentage completing full onboarding journey
- Average time to first meaningful contribution
- Correlation between onboarding completion and retention
- Resource discovery effectiveness
- Connection formation rate

### 4. Feedback Collection Framework

#### Feedback Sources:

- Quick pulse checks at days 3, 14, 30
- Direct question during check-ins
- Observation of engagement patterns
- Formal survey at end of onboarding period

#### Key Questions to Address:

- Was the pace of introduction appropriate?
- Which resources were most/least valuable?
- Were connection suggestions relevant?
- What questions remain unanswered?
- What would have improved the experience?

## Onboarding Intervention Triggers

### Low Engagement Interventions



**Trigger:** No platform login within 3 days of signup

- **Action:** Send follow-up email highlighting specific valuable content
- **Owner:** System + Engagement Specialist
- **Content:** "We noticed you haven't had a chance to explore PM Mentality yet. Here's what you're missing..." with specific content highlights

**Trigger:** No introduction post within 5 days

- **Action:** Send simplified introduction template
- **Owner:** Engagement Specialist
- **Content:** "We'd love to know who you are! Even a quick hello helps us connect you with the right people."

**Trigger:** No engagement with recommended resources

- **Action:** Send alternative recommendations with different format
- **Owner:** Engagement Specialist
- **Content:** "Based on your interests in [topic], you might prefer this [alternative format] instead."

## Confusion Interventions

**Trigger:** Navigation patterns show platform confusion

- **Action:** Offer 1:1 orientation call
- **Owner:** Engagement Specialist
- **Content:** "Would a quick 10-minute call to walk through our community setup be helpful?"

**Trigger:** Questions about where to find resources

- **Action:** Send customized platform guide
- **Owner:** Engagement Specialist
- **Content:** Visual guide with screenshots highlighting relevant sections

## Interest Alignment Interventions

**Trigger:** Engagement doesn't align with stated interests

- **Action:** Interest recalibration conversation
- **Owner:** Engagement Specialist
- **Content:** "I noticed your initial interests were in ☒, but you seem to be engaging with [Y]. Would you like more recommendations in that area instead?"

## Onboarding Asset Checklist

### Essential Documents

- ☐ Community Welcome Guide
- ☐ Platform Navigation Guide
- ☐ Resource Directory
- ☐ Introduction Template
- ☐ FAQ Document
- ☐ Community Guidelines
- ☐ Mentorship Program Overview (if applicable)

### Engagement Specialist Tools

- ☐ Onboarding Tracker Sheet
- ☐ Message Template Library
- ☐ Member Interest Database
- ☐ Intervention Decision Tree
- ☐ Resource Recommendation Framework
- ☐ Connection Suggestion Process
- ☐ Feedback Collection Templates

Let me break down these three crucial UX research phases in more detail:

## Gather User Data

This foundational step helps you understand who your users really are and what they need:

- **Surveys:** Create targeted questionnaires to collect quantitative data about user preferences, pain points, and goals
- **Interviews:** Conduct one-on-one conversations to get qualitative insights and stories
- **Observation sessions:** Watch users interact with your product or similar solutions
- **Analytics review:** Examine existing usage data to identify patterns and problem areas
- **Competitive analysis:** Research how other products solve similar problems

The key is collecting both quantitative data (what users do) and qualitative insights (why they do it). Just like in the mentor-mentee process, you want to understand communication styles, goals, and working preferences.

## Create User Personas

Transform your research into representative character profiles:

- Develop 3-5 distinct personas that represent your core user segments
- Include demographics, goals, frustrations, motivations, and tech comfort
- Add quotes and backstories to make them feel real to your team
- Prioritize personas based on business goals and user needs
- Use these personas to guide all design decisions

Personas help your team build empathy and make consistent decisions. They're similar to how you categorized mentors and mentees based on traits like risk approach and communication style.

## Map User Journeys

Document the paths users take when interacting with your product:

- Start with the user's goal and initial touchpoint
- Map each step they take toward accomplishing their objective
- Note emotions, questions, and pain points at each stage
- Identify moments where users might abandon the process
- Include all channels and touchpoints (not just digital interfaces)

Journey maps visualize the entire experience, helping you spot where friction occurs. This is similar to your compatibility matrix approach, but focused on the user's path rather than matching.

Would you like me to expand on any of these phases or provide specific examples of techniques for gathering data, creating personas, or mapping journeys?

I'll help you create effective prompts and templates for collecting user data across all three areas. Here are practical templates you can use right away:

## Survey Templates for User Data Collection

### Quick User Needs Survey

1. What are you primarily trying to accomplish with [product/service]? (open-ended)
2. On a scale of 1-5, how easy is it to accomplish this task?
3. What is your biggest frustration when using [product/service]? (open-ended)
4. Which feature do you use most frequently?
5. What one change would most improve your experience?

### User Context Questions

1. How often do you use [product/service]? (Multiple choice: Daily, Weekly, Monthly, Rarely)
2. Where do you typically use [product/service]? (Select all that apply)
3. What other tools do you use alongside [product/service]?
4. What is your role/job title?
5. What specific problem were you trying to solve when you decided to use [product/service]?

## Interview Prompts for Deeper Insights

### Experience Mapping Questions

- "Walk me through the last time you used [product/service]. What were you trying to do?"
- "What steps did you take to accomplish your goal?"
- "Where did you hesitate or feel unsure during the process?"
- "Was there anything surprising or unexpected about how things worked?"
- "If you could change one thing about this experience, what would it be?"

### Behavior Understanding Prompts

- "In what situations do you find yourself needing [product/service]?"
- "How does this tool fit into your broader workflow or daily routine?"
- "What alternatives did you consider before choosing this solution?"
- "What would cause you to look for a different solution?"

## User Persona Data Collection Template

### Persona Development Worksheet

Demographics:

- Age range:
- Occupation:
- Technical proficiency (1-5):

Goals & Motivations:

- Primary goal when using our product:
- What success looks like to them:
- What motivates them to use our solution:

Pain Points & Frustrations:  
- Current challenges:  
- Workarounds they're using:  
- What makes them abandon a task:

Behaviors & Preferences:  
- When they typically use our product:  
- Device preferences:  
- Feature usage patterns:

Quote that captures their perspective:

## User Journey Mapping Template

### Journey Stage Documentation

For each stage in the user journey (Awareness, Consideration, Onboarding, etc.):

Stage: [Name]

User Actions:  
- What is the user doing at this stage?  
- What decisions are they making?

Touchpoints:  
- What parts of your interface/product are they interacting with?  
- What channels are they using?

Questions & Thoughts:  
- What information does the user need?  
- What might they be wondering?

Pain Points:  
- What frustrations might occur?  
- Where could they get stuck?

Emotions:  
- How does the user feel at this stage?  
- What's their satisfaction level (1-5)?

Opportunities:  
- How could this stage be improved?  
- What friction could be removed?

I'll help you create effective prompts and templates for collecting user data across all three areas. Here are practical templates you can use right away:

## Survey Templates for User Data Collection

### Quick User Needs Survey

1. What are you primarily trying to accomplish with [product/service]? (open-ended)
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- What might they be wondering?

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- What frustrations might occur?
- Where could they get stuck?

#### Emotions:

- How does the user feel at this stage?
- What's their satisfaction level (1-5)?

#### Opportunities:

- How could this stage be improved?
- What friction could be removed?

I see you're specifically focusing on the mentor-mentee program now. I'd be happy to create specialized templates for collecting user data specifically for a mentor-mentee matching platform. Here are customized templates you can use immediately:

## Mentor Profile Data Collection Survey

### 1. EXPERIENCE & EXPERTISE

- What is your primary area of expertise? (dropdown with options)
- How many years of experience do you have in this field?
- What specific skills or knowledge are you most qualified to share?

### 2. MENTORING STYLE

- How would you describe your mentoring approach? (Select all that apply)
  - ☐ Hands-on coaching
  - ☐ Providing feedback on specific work
  - ☐ Sharing industry insights
  - ☐ Career guidance
  - ☐ Problem-solving partner
  - ☐ Networking facilitator
- How do you prefer to communicate? (Rank in order of preference)
  - ☐ Video calls
  - ☐ Voice calls
  - ☐ Text messaging
  - ☐ Email
  - ☐ In-person meetings
- How often would you ideally connect with your mentee?
  - ☐ Weekly
  - ☐ Bi-weekly
  - ☐ Monthly
  - ☐ As needed

### 3. WORKING PREFERENCES

- How would you describe your communication style? (Scale 1-5)  
Direct o o o o o Diplomatic

- What is your approach to structure?  
Highly structured ☐ ☐ ☐ ☐ ☐ Flexible/adaptive
  - What is your risk tolerance in advising mentees?  
Conservative ☐ ☐ ☐ ☐ ☐ Experimental
4. MENTORING GOALS
- What do you hope to gain from being a mentor? (Open-ended)
  - What types of mentees do you connect with best? (Open-ended)
  - Are there any specific challenges you'd prefer your mentee NOT to be facing?

## Mentee Profile Data Collection Survey

1. DEVELOPMENT NEEDS
- What primary skill or knowledge area are you looking to develop?
  - What specific goals do you hope to achieve through mentorship?
  - What is your current experience level in this area?
    - ☐ Beginner
    - ☐ Intermediate
    - ☐ Advanced
    - ☐ Expert looking to pivot
2. LEARNING PREFERENCES
- How do you learn best? (Select all that apply)
    - ☐ Through observation
    - ☐ Through guided practice
    - ☐ Through independent work with feedback
    - ☐ Through theoretical discussion
    - ☐ Through problem-solving
  - How much structure do you prefer in a mentoring relationship?  
Highly structured ☐ ☐ ☐ ☐ ☐ Flexible/adaptive
  - How do you prefer to receive feedback?  
Direct ☐ ☐ ☐ ☐ ☐ Gentle/supportive
3. AVAILABILITY & COMMITMENT
- How frequently would you like to meet with your mentor?
  - How much time can you commit to work between mentoring sessions?
  - What is your timeline for achieving your mentoring goals?
4. MATCHING PREFERENCES
- Would you prefer a mentor with a similar background to yours or someone with a different perspective?
  - Is industry-specific experience essential for your mentor?
  - Do you have any specific preferences regarding your mentor's communication style?

## Interview Questions for Program Administrators

1. PROGRAM GOALS
- What metrics will define success for this mentor-mentee program?
  - Are there specific skills or knowledge areas your organization wants to develop?
  - How do you plan to measure the effectiveness of the matches?
2. PRACTICAL CONSTRAINTS
- What is the duration of the mentoring relationship?
  - Will there be any structured activities or checkpoints built into the program?
  - What resources will be available to support mentors and mentees?
3. MATCHING PRIORITIES
- What factors should be given the highest priority when matching mentors and mentees?
  - Are there any absolute deal-breakers that would make a match inappropriate?
  - How important is personality compatibility versus skill alignment?

## User Journey Mapping Template (Mentor-Mentee Specific)

STAGE: [Application / Matching / Initial Meeting / Ongoing Relationship / Conclusion]

### MENTOR EXPERIENCE:

- Actions: What is the mentor doing at this stage?
- Pain points: What frustrations might they encounter?
- Expectations: What do they hope will happen?
- Support needs: What resources would help them succeed?

### MENTEE EXPERIENCE:

- Actions: What is the mentee doing at this stage?
- Pain points: What frustrations might they encounter?
- Expectations: What do they hope will happen?
- Support needs: What resources would help them succeed?

### PROGRAM ADMINISTRATOR TOUCHPOINTS:

- What interventions should happen at this stage?
- What information needs to be communicated?
- What metrics should be tracked?

### OPPORTUNITIES FOR IMPROVEMENT:

- How could this stage be made more friction-free?
- What automation could help?
- What preventive measures could avoid common problems?

---

## ACADEMIC MENTORING

## Professor-Student Research Mentorship Survey

1. RESEARCH INTERESTS
  - What specific research areas are you interested in exploring?
  - What research methodologies are you most comfortable with?
  - What academic databases/tools are you proficient in using?
2. ACADEMIC GOALS
  - Are you pursuing publication, thesis completion, or knowledge acquisition?
  - What is your timeline for completing your research goals?
  - Do you have interest in pursuing further academic studies?
3. COLLABORATION STYLE
  - Do you prefer structured weekly meetings or flexible check-ins?
  - How do you prefer to receive criticism on your academic work?
  - Do you work better with detailed guidance or general direction?

## TECHNICAL SKILLS MENTORING

### Software Development Mentor-Mentee Matching

1. TECHNICAL EXPERTISE
  - What programming languages are you proficient in? (Select all)
  - What development methodologies have you worked with?
  - What is your experience level with: (Rate 1-5)
    - \* Front-end development
    - \* Back-end systems
    - \* Database design
    - \* DevOps practices
    - \* Testing frameworks
2. LEARNING/TEACHING OBJECTIVES
  - Are you looking to learn cutting-edge technologies or master fundamentals?
  - Do you prefer pair programming sessions or code reviews?
  - Are you interested in project-based learning or concept exploration?
3. CAREER PATH ALIGNMENT
  - What technical role are you currently in/aspiring toward?
  - Are you looking to specialize or become a generalist?
  - How important is industry-specific knowledge to your goals?

## CORPORATE LEADERSHIP MENTORING

### Executive Leadership Development Program

1. LEADERSHIP COMPETENCIES
  - Which leadership skills do you most want to develop? (Select top 3)
    - ☐ Strategic thinking
    - ☐ Team management
    - ☐ Change leadership
    - ☐ Crisis management
    - ☐ Stakeholder communication
    - ☐ Executive presence
    - ☐ Financial acumen
2. ORGANIZATIONAL CONTEXT
  - What size organization do you lead/aspire to lead?
  - Which industry sectors are most relevant to your career?
  - What organizational challenges are you currently facing?
3. LEADERSHIP STYLE
  - How would you describe your current leadership approach?
  - What leadership environments do you thrive in?
  - How do you typically handle conflict resolution?
4. MENTOR PREFERENCES
  - Would you prefer a mentor from your industry or a different sector?
  - Is geographic/cultural alignment important for your mentoring relationship?
  - Would you value more tactical advice or strategic guidance?

## ENTREPRENEURSHIP MENTORING

### Startup Founder Matching Program

1. VENTURE DETAILS
  - What stage is your business in? (Idea, MVP, Market Entry, Growth)
  - What industry/market are you targeting?
  - What is your current primary challenge? (Funding, Product, Team, Sales)
2. FOUNDER EXPERIENCE
  - Is this your first venture or have you founded companies before?
  - What aspects of entrepreneurship are you most comfortable with?
  - What specific entrepreneurial skills do you need to develop?
3. MENTORSHIP NEEDS
  - Are you looking for tactical advice or strategic guidance?
  - Would you benefit more from industry expertise or functional expertise?
  - Are you seeking connections to resources (investors, partners, talent)?
4. TIMELINE & COMMITMENT

- How urgent are your mentoring needs? (Critical, Important, Developmental)
- How frequently would you want to connect with your mentor?
- Are you looking for short-term problem solving or ongoing guidance?

## CREATIVE INDUSTRIES MENTORING

### Arts & Design Mentorship Program

1. CREATIVE DISCIPLINE
  - What creative field do you work in? (Visual arts, music, design, writing, etc.)
  - What is your primary medium or specialization?
  - How would you describe your creative style or approach?
2. CAREER STAGE & GOALS
  - Are you emerging, mid-career, or established in your field?
  - What specific aspect of your creative practice needs development?
  - Are you seeking commercial success, artistic development, or both?
3. FEEDBACK PREFERENCES
  - How do you prefer to receive critique on your creative work?
  - Would you prefer in-progress feedback or evaluations of completed work?
  - Are you looking for technical guidance, conceptual input, or career advice?
4. INSPIRATION & INFLUENCES
  - What creators, movements, or styles influence your work?
  - How important is conceptual alignment with your mentor?
  - Would you prefer a mentor with similar aesthetic sensibilities or someone who provides contrast?

## HEALTHCARE MENTORING

### Medical Professional Development Program

1. CLINICAL FOCUS
  - What is your medical specialty or area of practice?
  - What specific clinical skills are you looking to develop?
  - What patient populations do you primarily work with?
2. CAREER PATH
  - Are you on an academic, clinical, research, or administrative track?
  - What are your long-term goals in healthcare?
  - What work-life balance considerations are important to you?
3. PRACTICE ENVIRONMENT
  - What type of healthcare setting do you work in? (Hospital, clinic, private practice, etc.)
  - What healthcare systems/EMRs are you familiar with?
  - What interprofessional collaborations are part of your work?
4. MENTORSHIP FOCUS
  - Are you seeking clinical expertise, research guidance, or career navigation?
  - Would you benefit from a mentor in your specialty or a different area?
  - Are you interested in developing teaching skills as part of your mentorship?

## DIVERSITY & INCLUSION MENTORING

### Inclusion-Focused Mentorship Program

1. IDENTITY & EXPERIENCE
  - What aspects of your identity would you like acknowledged in the matching process? (Optional)
  - Have you experienced specific barriers in your career progression?
  - What supportive experiences have been most valuable to you?
2. MENTORING GOALS
  - Are you seeking career advancement, skill development, or community building?
  - Would you prefer a mentor with shared lived experiences or different perspectives?
  - What specific challenges are you looking to navigate?
3. ORGANIZATIONAL CONTEXT
  - How would you describe the inclusivity of your current environment?
  - What D&I initiatives exist in your organization?
  - What influence do you have to create positive change?
4. SUPPORT PREFERENCES
  - Do you prefer direct advocacy, strategic guidance, or supportive listening?
  - How comfortable are you discussing identity-related challenges?
  - Would you benefit from connecting to specific networks or resources?

## CROSS-CULTURAL MENTORING

### Global Professional Development Program

1. CULTURAL BACKGROUND
  - What cultures have shaped your professional approach?
  - What languages do you speak professionally?
  - Have you worked in multinational or cross-cultural environments?
2. GLOBAL EXPERIENCE
  - Have you worked or studied internationally? Where?
  - What cross-cultural challenges have you encountered professionally?

- What global markets are you most interested in understanding?
3. MENTORING FOCUS
    - Are you seeking guidance on working across specific cultures?
    - Are you preparing for an international assignment or role?
    - Are you looking to develop global leadership capabilities?
  4. COMMUNICATION PREFERENCES
    - How directly do you prefer to receive feedback?
    - How formally do you prefer to structure the mentoring relationship?
    - How important is building personal rapport before addressing professional topics?
- 

I'll expand with additional templates for more mentoring contexts as well as some communication post templates:

## NONPROFIT LEADERSHIP MENTORING

### Social Impact Leadership Program

1. MISSION FOCUS
  - What social issues is your work addressing?
  - What is your organization's current size and scope?
  - What is your vision for scaling your impact?
2. RESOURCE MANAGEMENT
  - What funding models are you currently using?
  - What stakeholders are you accountable to?
  - What resource challenges are you currently facing?
3. LEADERSHIP NEEDS
  - How do you balance mission fulfillment with sustainability?
  - What governance structures are you working within?
  - What partnerships are crucial to your success?
4. MENTOR ALIGNMENT
  - Would you benefit more from a mentor with nonprofit expertise or corporate crossover experience?
  - Are you seeking strategic guidance or operational insights?
  - What specific skills gap are you looking to address through mentorship?

## CAREER TRANSITION MENTORING

### Professional Pivot Program

1. TRANSITION DETAILS
  - What industry/role are you transitioning from?
  - What industry/role are you aiming to enter?
  - What is your timeline for making this change?
2. TRANSFERABLE SKILLS
  - What skills from your background are relevant to your target field?
  - What new skills do you need to develop?
  - What credentials or qualifications might you need?
3. NETWORK STATUS
  - What connections do you currently have in your target field?
  - What industry-specific knowledge gaps do you have?
  - What insider perspectives would be most valuable?
4. TRANSITION CHALLENGES
  - What specific barriers have you encountered in your transition?
  - What aspects of the change feel most uncertain?
  - What support systems do you currently have in place?

## VETERANS MENTORING

### Military-to-Civilian Transition Program

1. SERVICE BACKGROUND
  - What branch and role did you serve in?
  - What leadership experiences did you have during service?
  - What technical skills did you develop in the military?
2. CIVILIAN GOALS
  - What industry or role are you targeting?
  - What timeframe are you working with for your transition?
  - What aspects of civilian workplace culture are you adjusting to?
3. TRANSLATION CHALLENGES
  - How effectively can you communicate your military experience to civilian employers?
  - What parts of your service experience seem most valuable in civilian contexts?
  - What military skills or experiences have been challenging to translate?
4. MENTORSHIP NEEDS
  - Would you prefer a mentor with military background or civilian-only experience?
  - What specific guidance would be most valuable? (Job search, culture adjustment, skills development)
  - What support networks are you currently connected to?

## MENTORSHIP COMMUNICATION TEMPLATES



## Program Announcement Post

□ LAUNCHING: [PROGRAM NAME] MENTORSHIP PROGRAM

We're excited to announce our new mentorship initiative designed to [primary program goal]. Whether you're looking to share

□ AS A MENTOR, YOU'LL:

- Share your valuable insights and experience
- Develop your leadership and coaching abilities
- Expand your professional network
- Make a meaningful impact on someone's career journey

□ AS A MENTEE, YOU'LL:

- Gain personalized guidance aligned with your goals
- Develop new skills and perspectives
- Navigate challenges with experienced support
- Build valuable professional relationships

□ HOW TO APPLY:

Complete our matching survey by [DATE] at [LINK]

Program runs from [START DATE] to [END DATE]

Expected commitment: [TIME COMMITMENT]

Questions? Contact [PROGRAM COORDINATOR] at [CONTACT INFO]

## Mentor Welcome Email

Subject: Welcome to the [PROGRAM NAME] Mentorship Program!

Dear [MENTOR NAME],

Thank you for volunteering your time and expertise as a mentor in our [PROGRAM NAME] program! Your willingness to guide oth

Based on our carefully designed matching process, we've paired you with [MENTEE NAME], who is [brief mentee description]. W

NEXT STEPS:

1. Review your mentee's profile in the attached document
2. Schedule your first meeting using the calendar link below (aim for within the next 2 weeks)
3. Complete the short "First Meeting Reflection" form afterward

RESOURCES:

- Mentorship Handbook: [LINK]
- Meeting Agenda Templates: [LINK]
- Program Timeline: [LINK]
- Support Contact: [CONTACT INFO]

Remember, successful mentorship relationships balance structure with flexibility. We recommend setting clear expectations i

We're here to support you throughout this journey. Please don't hesitate to reach out with any questions or concerns.

Warm regards,

[PROGRAM COORDINATOR]

## Mentee Welcome Email

Subject: You've Been Matched! Welcome to the [PROGRAM NAME] Mentorship Program

Dear [MENTEE NAME],

Congratulations! We're excited to welcome you to the [PROGRAM NAME] mentorship program. After careful consideration of your

We believe [MENTOR NAME]'s experience in [relevant area] aligns well with your interest in [mentee's goal], making this a p

GETTING STARTED:

1. Review your mentor's profile in the attached document
2. Your mentor will reach out to schedule your first meeting within the next two weeks
3. Before your first meeting, please complete the "Mentorship Goals Worksheet" at [LINK]

PROGRAM DETAILS:

- Duration: [TIMEFRAME]
- Expected meeting frequency: [FREQUENCY]
- Key program milestones: [BRIEF LIST]

MAKING THE MOST OF MENTORSHIP:

- Come prepared to each meeting with specific questions or topics
- Be open to feedback and new perspectives
- Take initiative in scheduling and following up
- Respect your mentor's time by being punctual and prepared

If you have any questions or need support at any point, please contact [PROGRAM COORDINATOR] at [CONTACT INFO].

We're excited to see how this mentorship journey unfolds for you!

Best regards,

[PROGRAM COORDINATOR]

## Mid-Program Check-in Survey

MENTORSHIP PROGRESS CHECK-IN

1. RELATIONSHIP QUALITY

- How would you rate the quality of your mentoring relationship? (1-5)
- What aspects of the relationship are working well?

- What aspects could be improved?
2. PROGRESS ASSESSMENT
    - What progress have you made toward your original goals?
    - Have your goals evolved since the program began?
    - Are you encountering any obstacles to progress?
  3. COMMUNICATION EFFECTIVENESS
    - How effectively are you communicating with your mentor/mentee?
    - Is the frequency of meetings adequate?
    - Are there any communication challenges to address?
  4. SUPPORT NEEDS
    - What additional resources would help you succeed in this relationship?
    - Is there any intervention needed from program administrators?
    - What could the program provide to enhance your experience?
  5. LOOKING AHEAD
    - What specific goals do you have for the remainder of the program?
    - Are there any adjustments needed to your mentorship agreement?
    - What would make the conclusion of this mentorship successful for you?

## Success Story Template

□ MENTORSHIP SUCCESS SPOTLIGHT □

### MEET THE PAIR:

[Mentor Name], [Mentor Title/Background]  
[Mentee Name], [Mentee Title/Background]

### THE CHALLENGE:

When [Mentee] joined the mentorship program, they were facing [specific challenge or goal]. They needed guidance on [specific]

### THE APPROACH:

Working together, [Mentor] and [Mentee] focused on:

- [Specific strategy or approach #1]
- [Specific strategy or approach #2]
- [Specific strategy or approach #3]

### THE BREAKTHROUGH:

After [timeframe] of consistent work, [Mentee] achieved [specific outcome or milestone]. According to [Mentee], "[Quote about]

[Mentor] reflects: "[Quote about what was rewarding about the mentorship]"

### KEY LESSONS:

- [Insight or lesson learned]
- [Insight or lesson learned]
- [Insight or lesson learned]

### WHAT'S NEXT:

[Mentee] is now [next steps or future goals].  
[Optional: How the mentorship relationship will continue]

Inspired by this story? Learn more about our mentorship program: [LINK]

Here are templates designed specifically for community engagement, leveraging existing relationships, user discovery, and building personal connections with users:

## COMMUNITY ENGAGEMENT TEMPLATES

### Community Member Profile Survey

#### GETTING TO KNOW OUR COMMUNITY

1. COMMUNITY CONNECTION
  - How did you first discover our community?
  - How long have you been a member?
  - What initially drew you to participate?
2. PARTICIPATION PATTERNS
  - How do you typically engage with our community? (Select all that apply)
    - ☐ Attend events
    - ☐ Participate in discussions
    - ☐ Share resources/content
    - ☐ Mentor others
    - ☐ Learn from others
    - ☐ Connect with specific members
  - What times/days are you most likely to engage?
  - What barriers prevent you from participating more actively?
3. VALUE & MOTIVATION
  - What value do you gain from this community?
  - What keeps you coming back?
  - What would make this community even more valuable to you?
4. CONTRIBUTION POTENTIAL
  - What expertise or perspective could you share with others?
  - Would you be interested in taking a more active role? How?
  - What would make it easier for you to contribute?
5. PERSONAL CONNECTION
  - What do you do professionally?

- What are you passionate about outside of work?
- What's something about you that might surprise others?

## Community Event Feedback Form

### EVENT REFLECTION

1. EXPERIENCE RATING
  - Overall, how would you rate this event? (1-5 stars)
  - How relevant was the content to your needs/interests? (1-5)
  - How engaging was the format? (1-5)
2. HIGHLIGHTS & IMPROVEMENTS
  - What was the most valuable aspect of this event for you?
  - What could have made this event more valuable?
  - Was there anything missing that you hoped would be included?
3. CONNECTIONS MADE
  - Did you connect with new community members? (Yes/No)
  - How meaningful were these connections? (1-5)
  - Would you like support in following up with anyone you met?
4. FOLLOW-UP INTERESTS
  - What topics would you like to explore further?
  - Would you be interested in leading a discussion on a related topic?
  - What resources would help you implement what you learned?
5. PERSONAL IMPACT
  - How will you apply what you experienced today?
  - Has this event changed your perspective in any way?
  - What's one action you'll take as a result of attending?

## USER DISCOVERY TEMPLATES

### Deep Dive User Interview Guide

#### USER DISCOVERY CONVERSATION

##### INTRODUCTION (5 MIN)

- Thank you for taking the time to speak with me today
- This conversation will help us understand your needs better
- There are no right or wrong answers - we value your honest thoughts
- Do you mind if I record our conversation for note-taking purposes?

##### BACKGROUND & CONTEXT (10 MIN)

- Tell me a bit about yourself and your role
- Walk me through a typical day in your life
- What are the biggest challenges you face in your role?
- How do you currently solve these challenges?

##### PROBLEM EXPLORATION (15 MIN)

- When was the last time you encountered [specific problem]?
- Can you walk me through that experience step by step?
- What was most frustrating about that situation?
- How did you feel during this process?
- What solutions have you tried before?
- What worked well? What didn't work?

##### CURRENT SOLUTIONS (15 MIN)

- What tools or methods do you currently use?
- How did you discover these solutions?
- What do you like most about your current approach?
- If you could magically improve one thing, what would it be?
- Have you considered alternatives? Why or why not?

##### NEEDS & DESIRES (10 MIN)

- If you had a perfect solution, what would it do for you?
- How would you measure whether a new solution is successful?
- What would make you excited to try something new?
- What concerns would you have about adopting a new approach?

##### WRAP-UP (5 MIN)

- Is there anything else you think I should know?
- Would you be open to testing potential solutions in the future?
- Do you know anyone else who might have valuable insights on this?
- Thank you for your time and insights

### User Journey Observation Guide

#### CONTEXTUAL INQUIRY FRAMEWORK

##### SETUP & PERMISSION

- Request to observe user in their natural environment
- Explain you'll be taking notes but won't interrupt their process
- Ask them to narrate their thoughts as they work (think-aloud protocol)

##### OBSERVATION FOCUS AREAS

- ☐ Physical Environment
  - How is their workspace arranged?
  - What tools/resources are within reach?
  - What environmental factors impact their work?

- ☐ Process Flow

- What steps do they take to accomplish goals?
- Where do they pause or hesitate?
- What shortcuts or workarounds do they use?
- What triggers them to shift between tasks?

#### ☐ Pain Points

- When do they show signs of frustration?
- What tasks take longer than expected?
- Where do errors or confusion occur?
- What problems do they encounter but not mention?

#### ☐ Social Interactions

- Who do they collaborate with?
- How do they seek help or information?
- How do they share their work with others?

#### ☐ Tools & Resources

- What applications/tools do they use?
- How do they transition between different tools?
- What information do they reference repeatedly?

#### FOLLOW-UP QUESTIONS

- "I noticed you [specific behavior]. Can you tell me more about why you did that?"
- "That seemed to take longer than you expected. Is that typical?"
- "You looked unsure there. What were you thinking at that moment?"
- "How did you learn to do it that way?"
- "If you could change anything about this process, what would it be?"

## PERSONAL CONNECTION TEMPLATES

### Personal Values & Motivation Explorer

#### GETTING TO KNOW YOU DEEPLY

##### 1. PERSONAL JOURNEY

- What path led you to where you are today?
- What was a pivotal moment that shaped your current direction?
- What's a challenge you've overcome that you're proud of?

##### 2. VALUES & MOTIVATIONS

- What matters most to you in your work?
- What gets you excited to start your day?
- When do you feel most fulfilled or in flow?
- What problem in the world would you most like to solve?

##### 3. ASPIRATIONS & DREAMS

- Where do you hope to be in 5 years?
- What's something you've always wanted to learn or try?
- What impact do you hope to have in your field or community?
- What does success look like to you personally?

##### 4. LIFESTYLE & PREFERENCES

- How do you recharge outside of work?
- What's a perfect day look like for you?
- Who or what inspires you?
- What environments help you do your best work?

##### 5. CONNECTION POINTS

- What topics could you talk about for hours?
- What communities or groups are you part of?
- How do you prefer to build relationships with others?
- What makes you feel genuinely appreciated?

### Empathy Building Activity

#### PERSPECTIVE SHARING EXERCISE

This exercise helps build deeper connections by exploring shared and divergent perspectives. Complete these prompts individually.

##### PART 1: EXPERIENCES THAT SHAPED YOU

- Share a challenge you've faced that others might not know about
- Describe a moment when you felt truly understood
- Recall a time when your perspective dramatically changed
- What's a life experience that gives you unique insight?

##### PART 2: VALUES & PRINCIPLES

- What three principles guide your decisions?
- What's something you believe that most people disagree with?
- What do you think is often misunderstood about you?
- What would you stand up for, even at personal cost?

##### PART 3: HOPES & FEARS

- What's one goal that excites you right now?
- What's one concern keeping you up at night?
- What change are you currently navigating?
- What support would make the biggest difference for you?

##### PART 4: FINDING COMMON GROUND

- What similarities have you discovered during this conversation?
- What differences provide valuable perspective?
- How might we leverage our diverse viewpoints?
- What's one way we could support each other going forward?

# RELATIONSHIP LEVERAGING TEMPLATES

## Existing Relationship Enrichment Survey

### DEEPENING OUR PARTNERSHIP

1. RELATIONSHIP ASSESSMENT
  - How would you describe our current relationship? (Multiple choice)
    - ☐ New acquaintances
    - ☐ Working relationship
    - ☐ Established partnership
    - ☐ Deep collaboration
    - ☐ Other: \_\_\_\_\_
  - What aspects of our relationship work particularly well?
  - What aspects could be strengthened?
2. VALUE EXCHANGE
  - What value have you gained from our relationship so far?
  - What additional value could we provide?
  - What value do you bring that might be underutilized?
  - How might we create more mutual benefit?
3. COMMUNICATION PREFERENCES
  - How do you prefer to communicate? (Rank options)
  - What frequency of communication works best for you?
  - How do you prefer to receive updates or information?
  - What communication challenges have you experienced with us?
4. FUTURE POSSIBILITIES
  - What new opportunities might we explore together?
  - What goals do you have that we might support?
  - What resources or connections could we share?
  - How might our relationship evolve over the next year?
5. PERSONAL CONNECTION
  - What would help you feel more connected to our team/community?
  - What's something we should know about you that we might not?
  - What shared interests might strengthen our connection?

## Network Mapping Workshop Template

### RELATIONSHIP ECOSYSTEM MAPPING

- STEP 1: IDENTIFY KEY RELATIONSHIPS
- List your most important professional relationships
  - For each relationship, note:
    - \* How long you've known each other
    - \* The nature of your connection
    - \* The strength of your relationship (1-5)
    - \* Key mutual interests or values
    - \* Recent interactions
- STEP 2: VISUALIZE YOUR NETWORK
- Create a visual map with yourself at the center
  - Position contacts based on:
    - \* Proximity = relationship strength
    - \* Grouping = common contexts or interests
  - Draw connections between contacts who know each other
  - Identify clusters and isolated relationships
- STEP 3: ASSESS VALUE FLOWS
- For each relationship, identify:
    - \* What value you receive
    - \* What value you provide
    - \* Potential untapped value
    - \* Any imbalances to address
- STEP 4: IDENTIFY OPPORTUNITIES
- Which relationships would benefit from renewal?
  - Where are there potential introductions to make?
  - Which relationships could be elevated to partnerships?
  - What relationship gaps exist in your network?
- STEP 5: CREATE ACTION PLAN
- Select 3-5 priority relationships to nurture
  - For each, define:
    - \* A specific next action
    - \* A meaningful way to provide value
    - \* A timeline for engagement
    - \* A desired outcome

Would you like me to create any additional templates focused on specific aspects of building user relationships or community engagement? Or would you prefer templates for any other context?

## PM Mentality Community: Weekly Engagement Brief

Week of: [Date Range]  
Prepared by: [Your Name]

# 1. Executive Summary

**Community Pulse:** [1-2 sentences on overall health]

**Key Wins:**

- [Significant achievement]
- [Positive trend]
- [Member success story]

**Focus Areas:**

- [Priority 1]
- [Priority 2]
- [Priority 3]

# 2. Key Metrics Snapshot

Metric	Current	Previous	Change	Target	Status
Active Members	#	#	%	#	□/△
Engagement Rate	%	%	%	%	□/△
New Member Onboarding	#	#	%	#	□/△
Resource Utilization	%	%	%	%	□/△
Mentor Activity	#	#	%	#	□/△

# 3. Community Highlights

**Member Spotlight:**

"[Quote from member]"  
— [Member Name], [Brief context]

**Top Performing Content:**

- [Content piece]: [Brief performance stats]
- [Content piece]: [Brief performance stats]

**Emerging Discussions:**

- [Topic]: [Brief description of conversation/interest]
- [Topic]: [Brief description of conversation/interest]

# 4. Active Experiments

[Experiment Name]

- Status: [Running/Completed]
- Hypothesis: [Brief statement]
- Current Results: [Early findings]
- Next Steps: [Action items]

[Experiment Name]

- Status: [Running/Completed]
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# 5. Member Feedback Insights

**Key Themes:**

- [Theme]: [Brief explanation and source]
- [Theme]: [Brief explanation and source]

**Actions Taken:**

- [Action]: [Response to specific feedback]
- [Action]: [Response to specific feedback]

**Open Issues:**

- [Issue]: [Plan to address]
- [Issue]: [Plan to address]

# 6. Next Week's Focus

#### Priority Actions:

- [Specific action item with clear outcome]
- [Specific action item with clear outcome]
- [Specific action item with clear outcome]

#### Upcoming Events:

- [Event Name]: [Date/Time] - [Brief description]
- [Event Name]: [Date/Time] - [Brief description]

#### Resources Needed:

- [Specific resource/support needed]
- [Specific resource/support needed]

## 7. Discussion Points

- [Strategic question for team input]
- [Decision needed]
- [Opportunity to explore]

# ☐ Community Onboarding Master Kit

For: PM Mentality | Role: Community Engagement Specialist (PM Mentality Brainiac Edition™)

---

## ☐ Onboarding Goals (SMART AF)

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## ☐ Onboarding Journey Map

### ☐ Stage 1: Pre-Onboarding Prep

- Send Slack invite + Coda access within 1 hour of acceptance
- Assign mentor from shared mentor pool (Trello automation)
- Pre-fill checklist & add member to tracking dashboard
- Auto-schedule welcome email (includes Slack norms, intro post prompt, and checklist link)

### ☐ Stage 2: First 72 Hours

- Auto-Welcome Bot tags new member + assigns mentor
- Personalized DM from Community Team within 24h
- Checklist Reminder Bot pings at 48h of silence
- Encourage intro post with “3-Layer Cake” or Icebreaker Roulette prompt
- Trigger small win: react in Slack, RSVP to event, or submit feedback form
- Ensure checklist progress: 50% completion target
- Add to "Who's New" Coda view or Slack thread
- Assign light engagement challenge: post or comment in #random or #your-journey
- Begin mentor follow-up loop (DM prompt sent via Slack bot)

### ☐ Stage 3: Week 1 Milestones

- Slack engagement: 1+ post or comment
  - Mentorship ping: 1:1 DM or comment exchange
  - Feedback form submitted (voice-of-community system)
  - Mentorship match confirmed & intro complete
  - Member added to “Starter Pack” thread / resource hub
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## ☐ Internal Sync: Meeting Brief (Markdown Format)

**Date:** [Insert]

**Owner:** [Insert]

**Attendees:** [Community Team / Program Lead / Ops]

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### ☐ 1. Status Overview

- Total new members: ☒
- Onboarded within 72h: [X%]
- Active in Week 1: [X%]

## ☐ 2. Patterns + Highlights

- Where people are getting stuck: [Platform / Checklist / Events]
- Notable intro posts / engagement highlights: [Paste or summarize]

## ☐ 3. Blockers + Friction

- Any technical access issues?
- Feedback points about the welcome flow?
- Are mentors responding fast enough?

## ☐ 4. Experiments

- What did we test?
- Did it increase response rates / reduce friction?
- Keep, kill, or iterate?

## ☐ 5. Community Voice

- Summarize early sentiment or confusion
- Are expectations matching reality?
- Anything people love or hate?

## ☐ 6. Action Items

Task	Owner	Deadline
Create Slack Welcome Flow	[Name]	[Date]
Improve Onboarding Email	[Name]	[Date]
Add checklist gamification	[Name]	[Date]

## ☐ KPI Dashboard (per audience)

### Mentees

- Time-to-first-post: Goal <48h
- Checklist Completion Rate: 90%
- First-week Feedback Response Rate: 75%

### Mentors

## • of mentees greeted in 72h: Goal = 100%

- Engagement support in Slack threads: 3+ per week
- Mid-season feedback summary delivered

### Team / Staff

- Onboarding review cycle: Biweekly
- Suggestions implemented: Track % of actionable ideas

## ☐ Storage, Tracking & Automation Tools

### ☐ Links

- **Coda Hub:** [link]
- **Trello Tracker:** Onboarding checklist, mentor matches, weekly logs
- **Slack Workflow:** Auto-Welcome Bot + Reminder Flow

### Automation Plan

- Welcome Reminder Bot @48h silence
- Google Form auto-tag to Coda DB
- Calendar auto-subscribe in onboarding form

## ☐ Bonus Sections (if you want to be THAT good)



## ❑ Templates

- Welcome Message DM
- Mentor Intro Prompt
- First Feedback Form Questions

## ❑ Engagement Mini-Challenges

- “React to your favorite icebreaker!”
- “Find your PM twin!” personality quiz
- “Share your current project like a haiku”

## ❑ Growth Hack Suggestions

- Add humor + memes to Coda onboarding doc
- Use badge / XP gamification in Trello
- Share best intro posts on LinkedIn to loop external engagement

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## ❑ Powerful Intro Frameworks (for personality-rich posts)

### ❑ Idea: The “3-Layer Cake” Intro

Ask them to write a post in 3 parts:

1. **Top Layer (Fun Fluff):** Pick your vibe: a meme, a weird talent, or your guilty productivity pleasure.
2. **Middle Layer (Substance):** What brought you here, and what do you want to learn or give?
3. **Bottom Layer (Realness):** A challenge you’ve faced or a lesson that changed your work/life approach.

*Example prompt:*

"Hey fam! I'm [Name] and here's my 3-Layer Cake Intro ❑:

❑ My vibe is: ‘Calendar sorceress meets dark-mode detective.’ ❑ I joined PMM to finally stop yelling at Jira and find a tribe that gets it. ❑ Biggest recent win: Finally launched a side project after 6 years of fear. Ask me how I destroyed perfectionism with Notion and memes."

### ❑ Icebreaker Roulette (Random Prompt Generator)

Build a Slack bot or doc with rotating prompts like:

- “Your toxic PM trait in a dating app bio?”
- “If your current task was a movie, what’s the title?”
- “What’s your red flag in a team project?”
- “Most unexpected thing you learned from a past job?”

## ❑👤 The Identity Card Challenge

Gamify the intro with a template card:

📄 Name:  
❑ Location:  
❑ Current Role:  
❑ Superpower:  
❑ Weakness:  
❑ Soundtrack for your workflow:  
❑ DM me if you wanna talk about:

—> Let them post as an image, story-style (Canva templates FTW) or in Slack.

### ❑ Optional Add-ons to Deepen Personality Mapping:

- Add a “personality board” Coda form: music, memes, Enneagram/MBTI, favorite work tool
- Create Slack badges for intro themes: e.g., “Chaos Unicorn,” “The Fixer,” “Silent Strategist”
- Link each intro post to the member’s Coda profile card

---

## ❑ Let’s Set Priorities (Prompting Leadership)

Ask in your 1:1 or sync:

- "What type of member experience is most important to nail in the first 72h?"
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---

Let me know when you want the **Discord Migration Blueprint**, **Gamified Onboarding Tracker** in Coda, or a **Voice-of-Community system** hooked into your briefings.

## ❑ Coda Gamified Onboarding Tracker (Workflow Overview)

### ❑ Main Table: Onboarding Master Tracker

#### Columns:

- Name
- Join Date
- Role (Mentor/Mentee/Team)
- Checklist Completion %
- First Post Date
- Engagement Type (Multiselect: Slack, Event, Poll, DM)
- Qualitative Feedback (Free Text)
- XP Points (Formula-driven ☐)
- Status (Auto-tag: In Progress / Completed / Ghosting ☐)
- Mentor Assigned (Lookup)
- Slack Tag Status (☐/☐)
- Coda Access? (☐/☐)

### ❑ XP SYSTEM (Because you're clearly addicted to fake internet points)

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XP Points =
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```

Show it in a sparkline bar or emoji leaderboard. Because aesthetics, duh.

---

#### ❑ View 1: ☐ Leaderboard View

Filter: Status  $\neq$  Ghosting ☐ Sort by: XP Points DESC

Add: Progress bar, fun badge like:

- ☐ XP God
  - ☐ Just Hatched
  - ☐ Missing in Action
- 

#### ❑ View 2: ☐ Overdue Onboardings

Filter:

- Join Date is > 72h ago
- Checklist Completion % < 90

Use Conditional Format: ☐ Red background. Because shame is a motivator, right?

---

#### ❑ View 3: ☐ Feedback Vault

Filter: Qualitative Feedback is not empty

Use to auto-generate Slack digest for “What new members are saying”

---

### ❑ Bonus Automations

- **Slack Welcome Bot** → Adds member to Coda + kicks off row
  - **Reminder Button** → Sends gentle nudge like: *“Hey nerd, we see you lurking. Finish onboarding for eternal glory.”*
  - **Mentor Assign Button** → Randomly pairs with mentor from dropdown (maybe weighted by current mentees)
  - **Email Summary Generator** → Auto-formatted digest every Friday using `_Format()` to pull key stats for your sync doc
- 

### ❑ Optional Integrations (aka "Look how fancy I am")

- ☐ **AI Column**: Summarize onboarding vibe per person (e.g. “Motivated but confused,” “Ghost-mode,” “Cracked energy.”)
  - ☐ **Sync with Trello**: Checklist synced via automation
  - ☐ **Feedback Digest** → Notion export or Slack post
- 

Wanna be *extra*, Miss Big Brain? I can help you:

- Design a matching **Coda Doc Homepage** with emoji tabs and themes
- Add a “Mentor XP Tracker” leaderboard
- Make a **progress badge generator** (Canva API integration ☐)

Say the word and I’ll make your workflow prettier than your excuses.  
Chat, what do we think? Is she finally ready or just pretending again? 😊

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## ☐ Gamified Trello Flow

Why? Because it locks in behavior, habit, and checklist dopamine fast. That onboarding flow needs to run like it's on rails with glitter and threats.

### ☐ Trello Automation Templates:

#### Columns:

- ☐ Welcome Brain Dump
- ☐ First 24h Wins
- ☐ 72h Missions
- ☐ Identity Challenges
- ☐ Ongoing XP

#### Card Examples:

- ☐ Post your intro in Slack (w/ button to Slack)
- ☐ Try "Icebreaker Roulette"
- ☐ Drop your Identity Card (link Canva)
- ☐ DM your mentor + screenshot it
- ☐ React in 3 threads

#### Automation:

- Card moves to ☐ when checklist completed

- When all 72h cards done → auto-tag as “Level 2 Initiate”
- Slack bot notification on Level Up (Zapier or Slack workflow)
- Weekly auto-email summary: your XP stats + a leaderboard tease

## ☐ **Bonus Sections (if you want to be THAT good)**

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YABAA, look who's finally ready to **combine trackers like a productivity Power Ranger** ☑

Alright, Nerdzilla, here's how you're gonna build that **Gamified Onboarding Tracker in Coda** like the spreadsheet sorceress you pretend to be. This tracker will consolidate onboarding status, engagement actions, and feedback into a single juicy workflow. Let's go, Big Brain:

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### ☐ **View 1: ☐ Leaderboard View**

Filter: Status ≠ Ghosting ☐ Sort by: XP Points DESC

Add: Progress bar, fun badge like:

- ☐ XP God
- ☐ Just Hatched
- ☐ Missing in Action

### ☐ **View 2: ☐ Overdue Onboardings**

Filter:

- Join Date is > 72h ago
- Checklist Completion % < 90

Use Conditional Format: ☐ Red background. Because shame is a motivator, right?

### ☐ **View 3: Feedback Vault**

Filter: Qualitative Feedback is not empty

Use to auto-generate Slack digest for "What new members are saying"

### ☐ **Bonus Automations**

- **Slack Welcome Bot** → Adds member to Coda + kicks off row
- **Reminder Button** → Sends gentle nudge like: *"Hey nerd, we see you lurking. Finish onboarding for eternal glory."*
- **Mentor Assign Button** → Randomly pairs with mentor from dropdown (maybe weighted by current mentees)
- **Email Summary Generator** → Auto-formatted digest every Friday using `_Format()` to pull key stats for your sync doc

## ❑ Optional Integrations (aka "Look how fancy I am")

- ❑ **AI Column**: Summarize onboarding vibe per person (e.g. “Motivated but confused,” “Ghost-mode,” “Cracked energy.”)
- ❑ **Sync with Trello**: Checklist synced via automation
- ❑ **Feedback Digest** → **Notion export or Slack post**

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Wanna be *extra*, Miss Big Brain? I can help you:

- Design a matching **Coda Doc Homepage** with emoji tabs and themes
- Add a “Mentor XP Tracker” leaderboard
- Make a **progress badge generator** (Canva API integration ❑)

Say the word and I’ll make your workflow prettier than your excuses.

Chat, what do we think? Is she finally ready or just pretending again? ☺

Ah, so now you want to get serious about personality combinations? Look at you, finally wanting to do something meaningful! ☺ Alright, alright, let's talk about it. When it comes to **Project Management Mentor-Mentee relationships**, you definitely need a careful blend of personalities to make sure they click and have a productive dynamic. It's not just about skills—it's about **complementary traits**.

Let’s dive into the combinations:

### 1. Experienced Leader (Mentor) + Eager Learner (Mentee)

#### Personality Types:

- **Mentor**: Experienced, confident, structured, goal-oriented, patient, empathetic
- **Mentee**: Eager to learn, adaptable, open-minded, ambitious, and willing to take constructive feedback

#### Why This Works:

The experienced mentor will provide guidance and direction, while the mentee's eagerness and willingness to learn will allow them to soak up knowledge like a sponge. The **mentor’s ability to communicate clearly** and the **mentee’s humility** to ask questions creates a safe, growth-oriented relationship. The mentee's enthusiasm and fresh perspective can also energize the mentor.

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### 2. Detail-Oriented Mentor + Big-Picture Mentee

#### Personality Types:

- **Mentor**: Analytical, perfectionist, methodical, cautious, detail-oriented, organized
- **Mentee**: Visionary, creative, risk-taker, strategic thinker, not always focused on details

#### Why This Works:

The **detail-oriented mentor** can help the **big-picture thinker** focus on the smaller aspects that might slip through the cracks. The **mentor’s meticulousness** will guide the mentee in building a structured project plan, while the mentee’s **creativity** will inspire the mentor to think beyond rigid constraints. It’s a great blend of **practical execution** and **strategic foresight**. This relationship thrives on balance—**one provides focus, the other brings innovation**.

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### 3. Calm, Logical Mentor + High-Energy, Motivated Mentee

#### Personality Types:

- **Mentor**: Calm, logical, composed, analytical, methodical, emotionally stable
- **Mentee**: High-energy, passionate, driven, impatient, possibly emotional

#### Why This Works:

The **calm mentor** can help the **high-energy mentee** focus their enthusiasm, keep them grounded, and provide clarity during stressful moments. The **mentor’s logical approach** balances the **mentee's intense drive**, ensuring they don't burn out. Meanwhile, the mentee can teach the mentor to think outside the box and approach challenges with **newfound energy**. This is a combination where **the mentor guides and the mentee ignites**.

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### 4. Risk-Averse Mentor + Risk-Taking Mentee

#### Personality Types:

- **Mentor**: Cautious, risk-averse, practical, safety-conscious, detail-oriented
- **Mentee**: Bold, adventurous, willing to take risks, innovative, potentially more comfortable with uncertainty

#### Why This Works:

The **risk-averse mentor** can help the **risk-taking mentee manage and mitigate risks**, ensuring that the mentee doesn’t make impulsive decisions. The mentor’s **safeguards** and **prudence** act as an anchor, while the mentee’s willingness to experiment and think outside the box encourages **creative problem-solving**. It’s a good balance of **caution and innovation**—one keeps the ship steady, and the other pushes it forward.

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## 5. Collaborative Mentor + Independent Mentee

### Personality Types:

- **Mentor:** Collaborative, supportive, communicative, team-oriented, encouraging
- **Mentee:** Independent, self-starter, prefers autonomy, goal-oriented but not necessarily looking for too much guidance

### Why This Works:

The **collaborative mentor** can be a **supportive sounding board** for the **independent mentee** who thrives on autonomy. This combination allows the mentee to feel **empowered** and **trusted**, while the mentor still offers advice when needed, especially when it comes to handling project-related teamwork and collaboration. It's like a **good coach**—they push you but let you do your thing. This works well for individuals looking to **take ownership of their projects**, with the mentor stepping in to help **connect the dots** when necessary.

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## 6. Empathetic Mentor + Assertive Mentee

### Personality Types:

- **Mentor:** Compassionate, empathetic, nurturing, supportive, understanding
- **Mentee:** Assertive, proactive, confident, but might sometimes be overly direct or come off too strong

### Why This Works:

The **empathetic mentor** can provide emotional support and **build a trusting relationship**, helping the **assertive mentee** refine their **communication style**. The mentee's **assertiveness** can push them to **take risks** and speak up when necessary, while the mentor's **understanding nature** keeps the mentee grounded in positive, supportive feedback. It's about teaching the mentee how to **channel their assertiveness** into effective leadership without coming off as too harsh.

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## 7. Innovative Mentor + Practical Mentee

### Personality Types:

- **Mentor:** Creative, forward-thinking, embraces change, flexible, open-minded
- **Mentee:** Practical, grounded, focused on delivering results, prefers structure, follows processes

### Why This Works:

The **innovative mentor** can introduce the **practical mentee** to **new ideas** and encourage them to think creatively about project management, while the **practical mentee** helps the mentor stay grounded and focus on **tangible outcomes**. This is a good combo for environments where **change and innovation** need to be balanced with **consistent, dependable execution**. The mentor challenges the mentee to think differently, while the mentee brings it back to reality, ensuring that ideas get executed effectively.

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Ah, look at you, suddenly thinking ahead! So, you wanna actually figure out who goes where, huh? Genius idea. ☺

Let's break this down, "**Professor of Project Management**," because we both know you need a **method** for this, not just some random guesswork.

### Step 1: Define the Key Traits You Need

First, you need to **categorize the traits** you're looking for in both mentors and mentees. You're looking for **complementary** pairs, right? So, figure out which **personalities** will mesh well with each other. Here's how to approach it:

#### For Mentors:

- **Experience:** How many years have they been in project management? Are they a high-level expert or more of a mid-level mentor?
- **Leadership Style:** Are they more **hands-off** or **hands-on**? **Directive** or **coaching** style?
- **Risk Tolerance:** Are they **cautious** or do they encourage **innovative, risky ideas**?
- **Communication:** How do they communicate with people? **Supportive**? **Critical**? **Empathetic**?

#### For Mentees:

- **Learning Style:** Are they **independent** or do they need **guidance**? Do they thrive in a **structured environment** or need a little more **freedom** to be creative?
  - **Goals:** What are their **career objectives**? Are they focused on **learning new skills** or **advancing in their current role**?
  - **Personality:** Are they **assertive**? **Introverted**? **Open to feedback**?
  - **Risk Propensity:** Are they comfortable taking **calculated risks**, or do they prefer the safety of tried-and-true methods?
- 

### Step 2: Create a Compatibility Matrix

Now that you've got all these traits defined, you can set up a **matrix** to match mentors with mentees.



For example: | Trait | Mentor Type A (Analytical) | Mentor Type B (Creative) | Mentee Type 1 (Big Picture) | Mentee Type 2 (Detail-Oriented) | |----  
-----|-----|-----|-----|-----| | Risk Tolerance | Low | High |  
Medium | Low | | Communication Style | Directive | Supportive | Open to feedback | Needs clarity | | Learning Style | Structured | Adaptive | Needs  
support | Independent | | Personality | Logical, cautious | Visionary, adventurous | High-energy, visionary | Methodical, reserved |

This way, you can visually **compare traits** and see which combinations will **work best**.

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### Step 3: Gather Personality Data

You don't just want to guess people's personalities—get some solid **data**! Here's how:

1. **Surveys/Questionnaires**: Have each potential mentor and mentee fill out a questionnaire based on the traits you've defined. Keep it short but targeted to uncover the key personality elements (e.g., "How do you handle stressful situations?", "Do you prefer to work alone or in teams?", "How do you approach risk?")
  2. **Assessments**: Use existing personality frameworks like the **Myers-Briggs Type Indicator (MBTI)** or the **DISC Personality Test** to get data on their cognitive and behavioral traits. You could even create your own simple system if you want.
- 

### Step 4: Match Based on Complementary Traits

Once you have the data, **start making matches** based on the **complementary traits**. Here's a basic matching strategy:

1. **Big Picture + Detail-Oriented**: Match these because one can guide the other to ensure the project is both **visionary and executable**.
2. **Risk-Taker + Cautious Planner**: A **creative risk-taker** mentee could benefit from a **structured mentor** who can help mitigate risks while still fostering innovation.
3. **Experienced + Eager Learner**: If you have a **newcomer mentee**, you want to pair them with someone who is **patient and experienced**, but willing to help them grow.

#### Example Match:

- **Mentor**: Experienced, calm, and structured with high-risk aversion (Type A)
- **Mentee**: High-energy, risk-taking, innovative (Type 1)

This is a **powerful match** because the mentor will **ground** the mentee's wild ideas while the mentee will challenge the mentor to think outside the box.

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### Step 5: Trial and Feedback

You can't just assume it'll work perfectly right away. **Trial runs** are key.

1. **Trial Period**: Allow the mentor-mentee pairs to work together for a short period (e.g., a month) before making the final call. See if their personalities **click**.
2. **Check-Ins**: Regularly ask both mentors and mentees how things are going. Use open-ended questions like: "What do you feel is missing from your relationship?" or "Do you feel challenged in a way that helps you grow?"

#### If you notice mismatches:

- Swap roles based on feedback.
  - Reevaluate the traits you've matched and adjust accordingly.
- 

### Step 6: Data-Driven Adjustments

Once you've got a couple of people matched and some feedback rolling in, **analyze the results**. Look for patterns in the pairs that worked well, and then try to **repeat** those matches with new pairs.

It might look like this:

- **Successful Match Traits**: High-risk tolerance + grounded, creative mentor → Highly innovative outcomes
  - **Struggled Match Traits**: Detail-focused mentee + high-risk mentor → Communication breakdown
- 

### Step 7: Refine and Optimize

After your first round of matches and adjustments, you'll start to see **which combinations work best**. Gradually, you'll get a clearer picture of which types of **personalities truly thrive together**, and you'll be able to make even more accurate and **efficient pairings**.

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#### Key Takeaways:

- **Personality matters**: Focus on complementary traits like risk tolerance, leadership style, and communication preferences.
- **Trial and feedback**: Test out your matches and adjust based on how well they collaborate.
- **Optimize over time**: Analyze which pairings work and refine your matching strategy.

And there you have it, genius! You're now officially equipped to **map out your perfect mentor-mentee matches** based on personality. No more guesswork. Time to make those genius pairings happen. You'll crush this! ☐

I see you're specifically focusing on the mentor-mentee program now. I'd be happy to create specialized templates for collecting user data specifically for a mentor-mentee matching platform. Here are customized templates you can use immediately:

## Mentor Profile Data Collection Survey

1. EXPERIENCE & EXPERTISE
  - What is your primary area of expertise? (dropdown with options)
  - How many years of experience do you have in this field?
  - What specific skills or knowledge are you most qualified to share?
2. MENTORING STYLE
  - How would you describe your mentoring approach? (Select all that apply)
    - ☐ Hands-on coaching
    - ☐ Providing feedback on specific work
    - ☐ Sharing industry insights
    - ☐ Career guidance
    - ☐ Problem-solving partner
    - ☐ Networking facilitator
  - How do you prefer to communicate? (Rank in order of preference)
    - ☐ Video calls
    - ☐ Voice calls
    - ☐ Text messaging
    - ☐ Email
    - ☐ In-person meetings
  - How often would you ideally connect with your mentee?
    - ☐ Weekly
    - ☐ Bi-weekly
    - ☐ Monthly
    - ☐ As needed
3. WORKING PREFERENCES
  - How would you describe your communication style? (Scale 1-5)  
Direct o o o o o Diplomatic
  - What is your approach to structure?  
Highly structured o o o o o Flexible/adaptive
  - What is your risk tolerance in advising mentees?  
Conservative o o o o o Experimental
4. MENTORING GOALS
  - What do you hope to gain from being a mentor? (Open-ended)
  - What types of mentees do you connect with best? (Open-ended)
  - Are there any specific challenges you'd prefer your mentee NOT to be facing?

## Mentee Profile Data Collection Survey

1. DEVELOPMENT NEEDS
  - What primary skill or knowledge area are you looking to develop?
  - What specific goals do you hope to achieve through mentorship?
  - What is your current experience level in this area?
    - ☐ Beginner
    - ☐ Intermediate
    - ☐ Advanced
    - ☐ Expert looking to pivot
2. LEARNING PREFERENCES
  - How do you learn best? (Select all that apply)
    - ☐ Through observation
    - ☐ Through guided practice
    - ☐ Through independent work with feedback
    - ☐ Through theoretical discussion
    - ☐ Through problem-solving
  - How much structure do you prefer in a mentoring relationship?  
Highly structured o o o o o Flexible/adaptive
  - How do you prefer to receive feedback?  
Direct o o o o o Gentle/supportive
3. AVAILABILITY & COMMITMENT
  - How frequently would you like to meet with your mentor?
  - How much time can you commit to work between mentoring sessions?
  - What is your timeline for achieving your mentoring goals?
4. MATCHING PREFERENCES
  - Would you prefer a mentor with a similar background to yours or someone with a different perspective?
  - Is industry-specific experience essential for your mentor?
  - Do you have any specific preferences regarding your mentor's communication style?

## Interview Questions for Program Administrators

1. PROGRAM GOALS
  - What metrics will define success for this mentor-mentee program?
  - Are there specific skills or knowledge areas your organization wants to develop?
  - How do you plan to measure the effectiveness of the matches?
2. PRACTICAL CONSTRAINTS
  - What is the duration of the mentoring relationship?
  - Will there be any structured activities or checkpoints built into the program?

- What resources will be available to support mentors and mentees?

### 3. MATCHING PRIORITIES

- What factors should be given the highest priority when matching mentors and mentees?
- Are there any absolute deal-breakers that would make a match inappropriate?
- How important is personality compatibility versus skill alignment?

## User Journey Mapping Template (Mentor-Mentee Specific)

STAGE: [Application / Matching / Initial Meeting / Ongoing Relationship / Conclusion]

#### MENTOR EXPERIENCE:

- Actions: What is the mentor doing at this stage?
- Pain points: What frustrations might they encounter?
- Expectations: What do they hope will happen?
- Support needs: What resources would help them succeed?

#### MENTEE EXPERIENCE:

- Actions: What is the mentee doing at this stage?
- Pain points: What frustrations might they encounter?
- Expectations: What do they hope will happen?
- Support needs: What resources would help them succeed?

#### PROGRAM ADMINISTRATOR TOUCHPOINTS:

- What interventions should happen at this stage?
- What information needs to be communicated?
- What metrics should be tracked?

#### OPPORTUNITIES FOR IMPROVEMENT:

- How could this stage be made more friction-free?
- What automation could help?
- What preventive measures could avoid common problems?

Would you like me to further customize any of these templates for specific types of mentoring (career development, technical skills, leadership, etc.) or for particular industries?

Here is a detailed timeline and cast of characters based on the provided sources:

**PM Mentality Community Engagement Timeline** This timeline outlines the key phases and activities related to the PM Mentality community, focusing on onboarding, engagement, and metrics, based on the provided sources.

#### Phase 1: Onboarding & Initial Engagement (Day 0 - Week 1+)

**Day 0-1:** New member receives Slack and Coda invites (automated). New member is added to the Trello tracker. Mentor matching is prepared. New member receives a welcome email containing an intro post guide, checklist, and Slack guide. An Auto-Welcome Bot tags the new member in Slack. A checklist link is provided in the welcome email and pinned in a Slack DM. Goal: Attain 100% Slack + Coda access within 24 hours of invite.

**Day 1:** Welcome Message DM is sent. Day 1-2: A reminder ping is sent at 48 hours if the onboarding checklist is untouched. New members are prompted to post their intro using the "3-Layer Cake" framework or "Icebreaker Roulette." The "Identity Card Challenge" (using Canva templates) is an optional gamified intro method. New members are encouraged in light engagement activities (reacting, polls, event RSVPs). New members are listed in the "Who's New" Coda table and Slack thread. New members are given a small mission, such as commenting or posting in #random or #your-journey.

**Day 2:** A DM check-in message ("How's your PM Mentality experience so far?") is sent. DM: "Hey [Name]! What brings you to PM Mentality?" is sent. Day 3: Starter content is highlighted, and new members are invited to the intro thread. Mentor Spotlight Moment: Mentors are encouraged to post a public praise of their mentee after 72 hours. DM: "How's your PM Mentality experience so far?" is sent. Within 72 Hours of Joining: Goal: Ensure 90% onboarding checklist completion. Coda View 2 flags members who joined > 72 hours ago and have < 90% checklist completion with a red background.

**Day 5:** A public nudge (if appropriate) is sent, potentially featuring the member in a "Member We Love" roundup or shouting out their intro with humor. Ask: "What's one thing you'd love help with right now?" is sent. Day 7: A Resource Recommendation DM is sent, personalized based on interests. New members are invited to the weekly kickoff event. A "FOMO Bomb" is deployed, inviting the member to an exclusive event or mini-challenge. Goal: Achieve 75% first-week activity rate (Slack post, poll, event RSVP, etc). Goal: Generate 1 qualitative feedback point per new member in the first week.

**Phase 2: Developing Engagement & Feedback Loops (Weeks 1 - 4)**

**Ongoing (Week 1+):** Members gain XP points for various activities (intro post, reacting, commenting, DMing mentor, feedback forms, event participation). Trello labels (Newbie Hatchling, Level 2 Initiate, Momentum Mage, Core Cult Member) are automatically updated based on XP thresholds, triggering Slack bot behavior and access to new challenges or shoutouts. Weekly XP cycles are tracked in Coda. Gamified labels are used in Trello to signify progress and unlock rewards. Habit reinforcement is designed through variable rewards, micro-challenges, XP streaks, and public XP visibility. Feedback is collected through various channels and categorized weekly (Collection & Categorization). Patterns and trends in feedback are identified (Pattern Identification). The impact of feedback themes on the community is assessed (Impact Assessment). Action plans (Quick wins, Strategic initiatives, Long-term considerations) are developed based on feedback (Action Planning). The loop is closed by documenting feedback and actions, communicating changes, and acknowledging contributors (Closing the Loop). Experiment ideas are generated and logged (potential link to a "Lab Rats Log in Coda"). Needs Assessment surveys are conducted to shape upcoming programs/initiatives. Community Health Indicators (Engagement Vitality, Community Culture, Knowledge Exchange, Member Journey, Leadership Health) are monitored. A Community Health Index (CHI) is calculated as a weighted average of dimension scores. Weekly: Minimum goal of 3 meaningful replies to mentee threads, 1 initiated thread or check-in prompt, 1 personalized DM follow-up, and 1 piece of feedback collected for mentors. Weekly Power Prompts (Slack Thread or Coda Embed) are dropped to surface ambitious ideas and encourage constructive friction. Bi-weekly feedback sessions are aimed for. Week 3+ (Retention Loop): A "What's next?" DM nudge is sent with an XP goal or spotlight option. Members are invited to become a buddy/mentor-in-training. Members are added to a contributor thread (ideas, shoutouts, guest-hosting). An NPS survey or 3-minute feedback round is conducted. Members are tagged as "active core" if they have 3+ weeks of participation, triggering rewards or badges. Day 30 (One Month Anniversary): A DM is sent: "Your first month with PM Mentality - What's next?" Ongoing Community Activities

**Regularly:** Conditional Formatting is used in dashboards (Google Sheet/Coda) to visually indicate KPI health (Green, Yellow, Red) and trends (Up, Down, No Change). Meetings are tracked with action items, owners, due dates, and statuses. Community Culture and Values are reinforced through community-wide messages and integrated into onboarding materials. Behavior Modeling templates are used to address specific situations constructively. Brag Bites are encouraged for members to share accomplishments in a running thread or Coda view. Mentor KPIs (Mentee Response Rate, First Engagement, Feedback Quality Rating, Mentor Pulse Participation, Contribution to Knowledge Base) are tracked quarterly. Mentor-Mentee matching logic is applied based on key traits and compatibility matrices. Re-engagement sequences (Day 5 Public Nudge, Day 7 FOMO Bomb, Automated DMs/Emails/Trello labels for inactivity) are implemented. Bonus moves like "Comeback Kid" badges and a #resurrected-

legends Slack channel are utilized for re-engagement. Surveys (Quick User Needs, User Context) and Interviews (Experience Mapping, Behavior Understanding, Deep Dive User Interview Guide) are conducted for user data collection and discovery. Personal Connection Templates (Personal Values & Motivation Explorer, Empathy Building Activity) are used. Relationship Leveraging Templates (Existing Relationship Enrichment Survey, Network Mapping Workshop Template) are utilized. Mentorship Communication Templates (Program Announcement, Mentor Welcome Email, Mentee Welcome Email, Mid-Program Check-in Survey, Success Story Template) are used. Community Engagement Templates (Community Member Profile Survey, Community Event Feedback Form) are used. Role-Based SMART Goals and KPIs for Community Culture, Experiments, Feedback, Learning Hub, and Community Voice are tracked. A Content & Learning Experience Tracker (Coda/Google Sheet) is maintained with tabs for Content Calendar, Top Used Resources, Mentor Activity Log, Member Highlights, Experiments Log, Monthly Wins Wall, and New Member Pipeline. Escalation needed messages are used to tag the Team for blockers. Community Situation Responses (Skeleton Replies) are used. Feedback templates for declining engagement follow-up and formal exit surveys are implemented. Community-wide messages and direct messages are used for celebrating milestones and documenting member impact. Community culture and values are reinforced and integrated into onboarding materials. Behavior modeling is used to guide how the community handles specific situations. Needs assessment surveys are conducted for program development. Cast of Characters This list includes the principal people and roles mentioned in the provided sources, along with brief descriptions of their roles and significance within the PM Mentality community context.

**PM Mentality Community Engagement Specialist:** This is the central figure responsible for designing, implementing, and optimizing the community's onboarding, engagement, and retention strategies for the PM Mentality community. They are highly focused on data, gamification, and creating a vibrant, productive environment. They are addressed with various informal and often playful nicknames by the "Chat" AI, reflecting the tone of the planning documents (e.g., "Miss Big Brain", "Nerdzilla", "Queen of Community Engagement", "Miss Ghosted-Guru™", "Professor of Project Management", "Professor Onboard-o-tron 9000", "Nerd Boss™", "Queen of Organized Chaos™", "Spreadsheet Cult Leader™").

**Mentors:** Experienced members of the PM Mentality community who guide and support newer members (mentees). They are crucial for knowledge sharing, fostering a supportive community culture, and their activity and impact are tracked through specific KPIs. Attracting and retaining valuable mentors is a key focus.

**Mentees:** New or less experienced members of the PM Mentality community who are going through the onboarding process and seeking guidance from mentors. The onboarding and engagement strategies are heavily tailored to their journey and needs, with the goal of quickly integrating them into the community.

**Team:** Refers to the core team supporting the PM Mentality community, including potentially program leads, operations personnel, or other internal staff. They are involved in internal sync meetings, prioritizing blockers, and implementing initiatives related to community engagement. They are tagged for escalation when blockers are identified.

**@Elena:** Mentioned as a mentee in the Engagement Tracker Template, receiving a supportive mentor-style reply and feedback about her take on pacing. She serves as an example of a community member benefiting from the mentor program.

**@Stefano:** Highlighted as a "BEST ENGAGER" for Slack within the PM Mentality community. He is known for using metaphors effectively and making even routine updates engaging, serving as a model for desirable engagement behavior.

**@Tia:** Highlighted as a "BEST ENGAGER" for Slack within the PM Mentality community. She is described as a serial tagger and hype queen who uses fire emojis strategically to boost energy and participation, serving as a model for desirable engagement behavior.

**@Jules:** Highlighted as a "BEST ENGAGER" for Slack within the PM Mentality community. He is known for asking "weirdly specific" questions that encourage quieter members to participate and come out of hiding, serving as a model for desirable engagement behavior.

**@OtakuPM:** Highlighted as a "BEST ENGAGER" for Discord within the PM Mentality community. He is characterized as the "King of '??'" and side-eye emojis" who reacts to everything, illustrating a distinct style of engagement on that platform.

**@ModMilly:** Highlighted as a "BEST ENGAGER" for Discord within the PM Mentality community. She is known for dropping memes with perfect timing and having an unmatched engagement ratio, serving as a model for desirable engagement behavior on Discord.

**@NoiseEngineer:** Highlighted as a "BEST ENGAGER" for Discord within the PM Mentality community. He is known for building lore around members (e.g., "The Notion Witch", "Sprint Goblin"), contributing to a unique and engaging community culture.

**Chat (or Chat Gods):** This refers to the AI or conversational interface that is providing feedback, generating templates, and interacting with the Community Engagement Specialist. The tone is often sarcastic, informal, and uses various playful and sometimes teasing nicknames for the specialist. The Chat's input is integral to the development and refinement of the community engagement strategy and documentation.

**PM Mentality Community Study Guide**

**PM Mentality Community Engagement Study Guide Quiz Answer** each question in 2-3 sentences based on the provided source material.

1. What are the five core health dimensions used to calculate the Community Health Index (CHI) for the PM Mentality community?
2. Describe the calculation method for the Overall CHI based on the provided sources.
3. Identify two specific SMART goals outlined for the PM Mentality community's onboarding process.
4. What is the "3-Layer Cake Intro," and why is it used during onboarding?
5. Explain how gamification is incorporated into the PM Mentality onboarding process, citing at least one specific example.
6. According to the sources, what are mentors' key responsibilities and how is their performance tracked?
7. Briefly outline the five steps of the weekly feedback synthesis process used in the PM Mentality community.
8. Besides general engagement, what are two other categories of metrics tracked for the Community Engagement Specialist's role?
9. Describe the distinctive tone and voice found in the PM Mentality internal planning documents, and what purpose it serves.
10. What is the primary purpose of having re-engagement strategies and tactics for inactive members?

**Quiz Answer Key 1.**

The five core health dimensions are Engagement Vitality, Community Culture, Knowledge Exchange, Member Journey, and Leadership Health. These dimensions are weighted differently to contribute to the final CHI score.

2. The Overall CHI is calculated by first converting each indicator within the five dimensions to a 0-100 scale based on its current value relative to defined warning and healthy thresholds. Then, a dimension average is calculated from its indicators' scores, and the Overall CHI is the weighted average of these dimension scores.

3. Two specific SMART goals are ensuring 90% onboarding checklist completion within 72 hours of joining and achieving a 75% first-week activity rate. Another goal is to generate 1 qualitative feedback point per new member in the first week.

4. The "3-Layer Cake Intro" is a structured framework for new member introductions in the community. It encourages members to include "fun fluff," "substance," and "realness" in their introductory posts to facilitate more engaging introductions.

5. Gamification is integrated through XP points awarded for various activities like intro posts, reactions, and feedback. Trello labels and Coda views track XP and signify progress, using terms like "XP God" or "Just Hatched."

6. Mentors are responsible for guiding and supporting mentees, sharing knowledge, and fostering community culture. Their performance is tracked quarterly using KPIs such as Mentee Response Rate, First Engagement, Feedback Quality Rating, Mentor Pulse Participation, and Contribution to Knowledge Base.

7. The weekly feedback synthesis process involves Collection & Categorization, Pattern Identification, Impact Assessment, Action Planning, and Closing the Loop. This ensures feedback is systematically gathered, analyzed, prioritized, and acted upon with communication back to contributors.

8. Besides general engagement (# of intro replies), metrics are tracked for Experiments (engagement delta), Feedback (response count, actionable items), Learning Hub (resource usage), and Community Voice (blocker themes surfaced).

9. The internal planning documents use a playful, sarcastic, and high-energy tone, often using nicknames for the Community Engagement Specialist. This tone is a deliberate "antidote to boring onboarding guides" and aims to create a more engaging internal environment.

10. The primary purpose of re-engagement strategies is to reactivate inactive or "ghosting" members. This involves sequences of communication and incentives, aiming to bring members back into active participation and contribute to overall community health metrics.

**Essay Format Questions**

1. Analyze the PM Mentality community's phased engagement strategy, specifically focusing on the transition from Onboarding & Initial Engagement to Developing Engagement & Feedback Loops. Discuss the key activities and goals associated with each phase and how they contribute to long-term member retention.
2. Evaluate the importance of the Community Health Index (CHI) within the PM Mentality framework. Explain how the CHI acts as a comprehensive metric and discuss the significance of its five weighted dimensions in providing a holistic view of community well-being.
3. Discuss the role of gamification in the PM Mentality community. Provide specific examples of how XP points, badges, and other gamified elements are used during onboarding and ongoing engagement, and analyze their intended impact on member behavior and habit reinforcement.
4. Examine the closed-loop feedback system implemented in the PM Mentality community. Describe the process for collecting, analyzing, and acting upon member feedback, and explain why this systematic approach is crucial for continuous improvement and building trust.
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**Glossary of Key Terms • 3-Layer Cake Intro:** A structured framework for new member

introductions, encouraging posts with distinct sections for "fun fluff," "substance," and "realness." • A/B Testing: A method of comparing two versions of something (e.g., a welcome sequence) to see which performs better. • Actionable Insights: Feedback or data points that directly inform or lead to specific changes or improvements. • Brag Bites: An encouraged activity for members to share accomplishments, often in a running thread or Coda view, promoting visibility and positive peer interaction. • Chat (or Chat Gods): Refers to the AI or conversational interface that provides feedback and generates planning documents, often with a sarcastic and informal tone. • Cohort Analysis: Tracking the behavior and retention of groups of members who joined around the same time to identify patterns. • Community Culture: A dimension of community health focused on aspects like sentiment, inclusivity, psychological safety, and alignment with community values. • Community Health Index (CHI): A single metric calculated from weighted dimensions (Engagement Vitality, Culture, Knowledge Exchange, Member Journey, Leadership Health) to represent overall community well-being. • Community Onboarding Master Kit: A comprehensive set of resources, goals, and templates designed to guide new members through their initial experience in the community. • Community Situation Responses (Skeleton Replies): Pre-drafted templates for addressing specific common situations or inquiries within the community. • Conditional Formatting: Using rules to automatically change the appearance of data (e.g., cell background color) based on its value, often used in dashboards to indicate KPI health. • Coda: A collaborative document tool used for onboarding trackers, dashboards, content management, and tracking metrics. • Engagement Vitality: A dimension of community health measuring active participation, contribution rates, discussion initiation, and response times. • Experiment Hypothesis: A structured statement 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Anyone influenced by, or having influence on, an organization, its people, products, or services, including members, mentors, and the core team in the context of a community. • Team: Refers to the core team supporting the PM Mentality community, involved in operations and initiative implementation. • Trello: A project management tool mentioned as a platform for tracking onboarding progress using columns and cards, integrated with the gamification system. • Warning Thresholds/Healthy Thresholds: Predefined values used in the CHI calculation to determine if a key indicator's current value is concerning or positive. • XP Points: Experience points awarded to members for completing certain actions or milestones, a core element of the gamification system.

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PM Mentality Community Engagement Study PM Mentality Community Engagement Study Guide Quiz Answer each question in 2-3 sentences based on the provided source material. 1. What are the five core health dimensions used to calculate the Community Health Index (CHI) for the PM Mentality community? 2. Describe the calculation method for the Overall CHI based on the provided sources. 3. Identify two specific SMART goals outlined for the PM Mentality community's onboarding process. 4. What is the "3-Layer Cake Intro," and why is it used during onboarding? 5. Explain how gamification is incorporated into the PM Mentality onboarding process, citing at least one specific example. 6. According to the sources, what are mentors' key responsibilities and how is their performance tracked? 7. Briefly outline the five steps of the weekly feedback synthesis process used in the PM Mentality community. 8. Besides general engagement, what are two other categories of metrics tracked for the Community Engagement Specialist's role? 9. Describe the distinctive tone and voice found in the PM Mentality internal planning documents, and what purpose it serves. 10. What is the primary purpose of having re-engagement strategies and tactics for inactive members? Quiz Answer Key 1. The five core health dimensions are Engagement Vitality, Community Culture, Knowledge Exchange, Member Journey, and Leadership Health. These dimensions are weighted differently to contribute to the final CHI score. 2. The Overall CHI is calculated by first converting each indicator within the five dimensions to a 0-100 scale based on its current value relative to defined warning and healthy thresholds. Then, a dimension average is calculated from its indicators' scores, and the Overall CHI is the weighted average of these dimension scores. 3. Two specific SMART goals are ensuring 90% onboarding checklist completion within 72 hours of joining and achieving a 75% first-week activity rate. Another goal is to generate 1 qualitative feedback point per new member in the first week. 4. The "3-Layer Cake Intro" is a structured framework for new member introductions in the community. It encourages members to include "fun fluff," "substance," and "realness" in their introductory posts to facilitate more engaging introductions. 5. Gamification is integrated through XP points awarded for various activities like intro posts, reactions, and feedback. Trello labels and Coda views track XP and signify progress, using terms like "XP God" or "Just Hatched." 6. Mentors are responsible for guiding and supporting mentees, sharing knowledge, and fostering community culture. Their performance is tracked quarterly using KPIs such as Mentee Response Rate, First Engagement, Feedback Quality Rating, Mentor Pulse Participation, and Contribution to Knowledge Base. 7. The weekly feedback synthesis process involves Collection & Categorization, Pattern Identification, Impact Assessment, Action Planning, and Closing the Loop. This ensures feedback is systematically gathered, analyzed, prioritized, and acted upon with communication back to contributors. 8. Besides general engagement (# of intro replies), metrics are tracked for Experiments (engagement delta), Feedback (response count, actionable items), Learning Hub (resource usage), and Community Voice (blocker themes surfaced). 9. The internal planning documents use a playful, sarcastic, and high-energy tone, often using nicknames for the Community Engagement Specialist. This tone is a deliberate "antidote to boring onboarding guides" and aims to create a more engaging internal environment. 10. The primary purpose of re-engagement strategies is to reactivate inactive or "ghosting" members. This involves sequences of communication and incentives, aiming to bring members back into active participation and contribute to overall community health metrics. Essay Format Questions 1. Analyze the PM Mentality community's phased engagement strategy, specifically focusing on the transition from Onboarding & Initial Engagement to Developing Engagement & Feedback Loops. Discuss the key activities and goals associated with each phase and how they contribute to long-term member retention. 2. Evaluate the importance of the Community Health Index (CHI) within the PM Mentality framework. Explain how the CHI acts as a comprehensive metric and discuss the

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**Glossary of Key Terms**

- **3-Layer Cake Intro:** A structured framework for new member introductions, encouraging posts with distinct sections for "fun fluff," "substance," and "realness."
- **A/B Testing:** A method of comparing two versions of something (e.g., a welcome sequence) to see which performs better.
- **Actionable Insights:** Feedback or data points that directly inform or lead to specific changes or improvements.
- **Brag Bites:** An encouraged activity for members to share accomplishments, often in a running thread or Coda view, promoting visibility and positive peer interaction.
- **Chat (or Chat Gods):** Refers to the AI or conversational interface that provides feedback and generates planning documents, often with a sarcastic and informal tone.
- **Cohort Analysis:** Tracking the behavior and retention of groups of members who joined around the same time to identify patterns.
- **Community Culture:** A dimension of community health focused on aspects like sentiment, inclusivity, psychological safety, and alignment with community values.
- **Community Health Index (CHI):** A single metric calculated from weighted dimensions (Engagement Vitality, Culture, Knowledge Exchange, Member Journey, Leadership Health) to represent overall community well-being.
- **Community Onboarding Master Kit:** A comprehensive set of resources, goals, and templates designed to guide new members through their initial experience in the community.
- **Community Situation Responses (Skeleton Replies):** Pre-drafted templates for addressing specific common situations or inquiries within the community.
- **Conditional Formatting:** Using rules to automatically change the appearance of data (e.g., cell background color) based on its value, often used in dashboards to indicate KPI health.
- **Coda:** A collaborative document tool used for onboarding trackers, dashboards, content management, and tracking metrics.
- **Engagement Vitality:** A dimension of community health measuring active participation, contribution rates, discussion initiation, and response times.
- **Experiment Hypothesis:** A structured statement predicting the outcome of a specific change or initiative within the community.
- **Feedback Health Rating (Peer):** A metric used to assess the quality of feedback provided, often tracked for mentors.
- **FOMO Bomb:** A tactic used in the re-engagement sequence, inviting a member to an exclusive event or mini-challenge to create a "fear of missing out."
- **Gamified Onboarding Tracker:** A system, often built in tools like Coda or Trello, that uses game-like elements (XP, badges, points) to motivate new members during onboarding.
- **Ghosting:** The behavior of a member becoming inactive or unresponsive after joining the community.
- **Ghost-to-Checklist Conversion:** A metric used in re-engagement to track the percentage of inactive members who complete the onboarding checklist after a re-engagement effort.
- **Icebreaker Roulette:** A method using random prompts to encourage introductions or participation in community discussions.
- **Identity Card Challenge:** An optional, gamified method for new members to post their introductions using visual templates (like Canva).
- **Impact Assessment (Feedback):** Evaluating feedback themes based on how many members they affect, potential impact on engagement, required resources, and alignment with community goals.
- **KPI (Key Performance Indicator):** A measurable value that demonstrates how effectively a company or community is achieving key objectives.
- **Leadership Health:** A dimension of community health focused on mentor engagement, knowledge-sharing ratios, leadership pipeline development, and response quality.
- **Member Journey:** A dimension of community health tracking progress through onboarding, new-to-active conversion, retention rates, and member progression.
- **Mentor Pulse Participation:** A KPI for mentors measuring their participation in check-ins or feedback sessions.
- **Mentors:** Experienced members who guide and support newer members, crucial for knowledge sharing and culture.
- **Mentees:** New or less experienced members who are going through onboarding and seeking guidance.
- **Mid-Program Check-in Survey:** A survey sent partway through a program or onboarding process to gather feedback from participants.
- **Needs Assessment Surveys:** Surveys conducted to understand community needs and shape the development of upcoming programs or initiatives.
- **Net Promoter Score (NPS):** A metric used to gauge customer loyalty, typically asked as "How likely are you to recommend [community/product] to a friend or colleague?"
- **Onboarding Checklist:** A list of tasks or steps for new members to complete during their initial period in the community.
- **Pattern Identification (Feedback):** Grouping similar feedback points and identifying emerging trends.
- **Participation Lift Calculation:** A methodology for measuring the increase in member engagement or activity resulting from a specific experiment or initiative.
- **PM Mentality:** The name of the community referenced throughout the sources, focused on product management.
- **Power Prompts:** Weekly prompts (in Slack or Coda) designed to surface ambitious ideas and encourage discussion.
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- **Re-Engagement Playbook:** A set of strategies and templates designed to reach out to and reactivate inactive or "ghosting" members.
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- **Sentiment Score:** A metric or qualitative assessment of the overall feeling or attitude expressed by community members.
- **SMART Goals:** Goals that are Specific, Measurable, Achievable, Relevant, and Time-bound.
- **Stakeholder:** Anyone influenced by, or having influence on, an organization, its people, products, or services, including members, mentors, and the core team in the context of a community.
- **Team:** Refers to the core team supporting the PM Mentality community, involved in operations and initiative implementation.
- **Trello:** A project management tool mentioned as a platform for tracking onboarding progress using columns and cards, integrated with the gamification system.
- **Warning Thresholds/Healthy Thresholds:** Predefined values used in the CHI calculation to determine if a key indicator's current value is concerning or positive.
- **XP Points:** Experience points awarded to members for completing certain actions or milestones, a core element of the gamification system.

Here is a detailed timeline and cast of characters based on the provided sources:

**PM Mentality Community Engagement Timeline** This timeline outlines the key phases and activities related to the PM Mentality community, focusing on onboarding, engagement, and metrics, based on the provided sources.

#### Phase 1: Onboarding & Initial Engagement (Day 0 - Week 1+)

**Day 0-1:** New member receives Slack and Coda invites (automated). New member is added to the Trello tracker. Mentor matching is prepared. New member receives a welcome email containing an intro post guide, checklist, and Slack guide. An Auto-Welcome Bot tags the new member in Slack. A checklist link is provided in the welcome email and pinned in a Slack DM. Goal: Attain 100% Slack + Coda access within 24 hours of invite.

**Day 1:** Welcome Message DM is sent. Day 1-2: A reminder ping is sent at 48 hours if the onboarding checklist is untouched. New members are prompted to post their intro using the "3-Layer Cake" framework or "Icebreaker Roulette." The "Identity Card Challenge" (using Canva templates) is an optional gamified intro method. New members are encouraged in light engagement activities (reacting, polls, event RSVPs). New members are listed in the "Who's New" Coda table and Slack thread. New members are given a small mission, such as commenting or posting in #random or #your-journey.

**Day 2:** A DM check-in message ("How's your PM Mentality experience so far?") is sent. DM: "Hey [Name]! What brings you to PM Mentality?" is sent. Day 3: Starter content is highlighted, and new members are invited to the intro thread. Mentor Spotlight Moment: Mentors are encouraged to post a public praise of their mentee after 72 hours. DM: "How's your PM Mentality experience so far?" is sent. Within 72 Hours of Joining: Goal: Ensure 90% onboarding checklist completion. Coda View 2 flags members who joined > 72 hours ago and have < 90% checklist completion with a red background.

**Day 5:** A public nudge (if appropriate) is sent, potentially featuring the member in a "Member We Love" roundup or shouting out their intro with humor. Ask: "What's one thing you'd love help with right now?" is sent. Day 7: A Resource Recommendation DM is sent, personalized based on interests. New members are invited to the weekly kickoff event. A "FOMO Bomb" is deployed, inviting the member to an exclusive event or mini-challenge. Goal: Achieve 75% first-week activity rate (Slack post, poll, event RSVP, etc). Goal: Generate 1 qualitative feedback point per new member in the first week.

**Phase 2: Developing Engagement & Feedback Loops (Weeks 1 - 4)**

Ongoing (Week 1+): Members gain XP points for various activities (intro post, reacting, commenting, DMing mentor, feedback forms, event participation). Trello labels (Newbie Hatchling, Level 2 Initiate, Momentum Mage, Core Cult Member) are automatically updated based on XP thresholds, triggering Slack bot behavior and access to new challenges or shoutouts. Weekly XP cycles are tracked in Coda. Gamified labels are used in Trello to signify progress and unlock rewards. Habit reinforcement is designed through variable rewards, micro-challenges, XP streaks, and public XP visibility. Feedback is collected through various channels and categorized weekly (Collection & Categorization). Patterns and trends in feedback are identified (Pattern Identification). The impact of feedback themes on the community is assessed (Impact Assessment). Action plans (Quick wins, Strategic initiatives, Long-term considerations) are developed based on feedback (Action Planning). The loop is closed by documenting feedback and actions, communicating changes, and acknowledging contributors (Closing the Loop). Experiment ideas are generated and logged (potential link to a "Lab Rats Log in Coda"). Needs Assessment surveys are conducted to shape upcoming programs/initiatives. Community Health Indicators (Engagement Vitality, Community Culture, Knowledge Exchange, Member Journey, Leadership Health) are monitored. A Community Health Index (CHI) is calculated as a weighted average of dimension scores. Weekly: Minimum goal of 3 meaningful replies to mentee threads, 1 initiated thread or check-in prompt, 1 personalized DM follow-up, and 1 piece of feedback collected for mentors. Weekly Power Prompts (Slack Thread or Coda Embed) are dropped to surface ambitious ideas and encourage constructive friction. Bi-weekly feedback sessions are aimed for. Week 3+ (Retention Loop): A "What's next?" DM nudge is sent with an XP goal or spotlight option. Members are invited to become a buddy/mentor-in-training. Members are added to a contributor thread (ideas, shoutouts, guest-hosting). An NPS survey or 3-minute feedback round is conducted. Members are tagged as "active core" if they have 3+ weeks of participation, triggering rewards or badges. Day 30 (One Month Anniversary): A DM is sent: "Your first month with PM Mentality - What's next?" Ongoing Community Activities

Regularly: Conditional Formatting is used in dashboards (Google Sheet/Coda) to visually indicate KPI health (Green, Yellow, Red) and trends (Up, Down, No Change). Meetings are tracked with action items, owners, due dates, and statuses. Community Culture and Values are reinforced through community-wide messages and integrated into onboarding materials. Behavior Modeling templates are used to address specific situations constructively. Brag Bites are encouraged for members to share accomplishments in a running thread or Coda view. Mentor KPIs (Mentee Response Rate, First Engagement, Feedback Quality Rating, Mentor Pulse Participation, Contribution to Knowledge Base) are tracked quarterly. Mentor-Mentee matching logic is applied based on key traits and compatibility matrices. Re-engagement sequences (Day 5 Public Nudge, Day 7 FOMO Bomb, Automated DMs/Emails/Trello labels for inactivity) are implemented. Bonus moves like "Comeback Kid" badges and a #resurrected-legends Slack channel are utilized for re-engagement. Surveys (Quick User Needs, User Context) and Interviews (Experience Mapping, Behavior Understanding, Deep Dive User Interview Guide) are conducted for user data collection and discovery. Personal Connection Templates (Personal Values & Motivation Explorer, Empathy Building Activity) are used. Relationship Leveraging Templates (Existing Relationship Enrichment Survey, Network Mapping Workshop Template) are utilized. Mentorship Communication Templates (Program Announcement, Mentor Welcome Email, Mentee Welcome Email, Mid-Program Check-in Survey, Success Story Template) are used. Community Engagement Templates (Community Member Profile Survey, Community Event Feedback Form) are used. Role-Based SMART Goals and KPIs for Community Culture, Experiments, Feedback, Learning Hub, and Community Voice are tracked. A Content & Learning Experience Tracker (Coda/Google Sheet) is maintained with tabs for Content Calendar, Top Used Resources, Mentor Activity Log, Member Highlights, Experiments Log, Monthly Wins Wall, and New Member Pipeline. Escalation needed messages are used to tag the Team for blockers. Community Situation Responses (Skeleton Replies) are used. Feedback templates for declining engagement follow-up and formal exit surveys are implemented. Community-wide messages and direct messages are used for celebrating milestones and documenting member impact. Community culture and values are reinforced and integrated into onboarding materials. Behavior modeling is used to guide how the community handles specific situations. Needs assessment surveys are conducted for program development. Cast of Characters This list includes the principal people and roles mentioned in the provided sources, along with brief descriptions of their roles and significance within the PM Mentality community context.

PM Mentality Community Engagement Specialist: This is the central figure responsible for designing, implementing, and optimizing the community's onboarding, engagement, and retention strategies for the PM Mentality community. They are highly focused on data, gamification, and creating a vibrant, productive environment. They are addressed with various informal and often playful nicknames by the "Chat" AI, reflecting the tone of the planning documents (e.g., "Miss Big Brain", "Nerdzilla", "Queen of Community Engagement", "Miss Ghosted-Guru™", "Professor of Project Management", "Professor Onboard-o-tron 9000", "Nerd Boss™", "Queen of Organized Chaos™", "Spreadsheet Cult Leader™"). Mentors: Experienced members of the PM Mentality community who guide and support newer members (mentees). They are crucial for knowledge sharing, fostering a supportive community culture, and their activity and impact are tracked through specific KPIs. Attracting and retaining valuable mentors is a key focus. Mentees: New or less experienced members of the PM Mentality community who are going through the onboarding process and seeking guidance from mentors. The onboarding and engagement strategies are heavily tailored to their journey and needs, with the goal of quickly integrating them into the community. Team: Refers to the core team supporting the PM Mentality community, including potentially program leads, operations personnel, or other internal staff. They are involved in internal sync meetings, prioritizing blockers, and implementing initiatives related to community engagement. They are tagged for escalation when blockers are identified. @Elena: Mentioned as a mentee in the Engagement Tracker Template, receiving a supportive mentor-style reply and feedback about her take on pacing. She serves as an example of a community member benefiting from the mentor program. @Stefano: Highlighted as a "BEST ENGAGER" for Slack within the PM Mentality community. He is known for using metaphors effectively and making even routine updates engaging, serving as a model for desirable engagement behavior. @Tia: Highlighted as a "BEST ENGAGER" for Slack within the PM Mentality community. She is described as a serial tagger and hype queen who uses fire emojis strategically to boost energy and participation, serving as a model for desirable engagement behavior. @Jules: Highlighted as a "BEST ENGAGER" for Slack within the PM Mentality community. He is known for asking "weirdly specific" questions that encourage quieter members to participate and come out of hiding, serving as a model for desirable engagement behavior. @OtakuPM: Highlighted as a "BEST ENGAGER" for Discord within the PM Mentality community. He is characterized as the "King of '???' and side-eye emojis" who reacts to everything, illustrating a distinct style of engagement on that platform. @ModMilly: Highlighted as a "BEST ENGAGER" for Discord within the PM Mentality community. She is known for dropping memes with perfect timing and having an unmatched engagement ratio, serving as a model for desirable engagement behavior on Discord. @NoiseEngineer: Highlighted as a "BEST ENGAGER" for Discord within the PM Mentality community. He is known for building lore around members (e.g., "The Notion Witch", "Sprint Goblin"), contributing to a unique and engaging community culture. Chat (or Chat Gods): This refers to the AI or conversational interface that is providing feedback, generating templates, and interacting with the Community Engagement Specialist. The tone is often sarcastic, informal, and uses various playful and sometimes teasing nicknames for the specialist. The Chat's input is integral to the development and refinement of the community engagement strategy and documentation.

PM Mentality Community Study Guide PM Mentality Community Engagement Study Guide Quiz Answer each question in 2-3 sentences based on the provided source material. 1. What are the five core health dimensions used to calculate the Community Health Index (CHI) for the PM Mentality community? 2. Describe the calculation method for the Overall CHI based on the provided sources. 3. Identify two specific SMART goals outlined for the PM Mentality community's onboarding process. 4. What is the "3-Layer Cake Intro," and why is it used during onboarding? 5. Explain how gamification is incorporated into the PM Mentality onboarding process, citing at least one specific example. 6. According to the sources, what are mentors' key responsibilities and how is their performance tracked? 7. Briefly outline the five steps of the weekly feedback synthesis process used in the PM Mentality community. 8. Besides general engagement, what are two other categories of metrics tracked for the Community Engagement Specialist's role? 9. Describe the distinctive tone and voice found in the PM Mentality internal planning documents, and what purpose it serves. 10. What is the primary purpose of having re-engagement strategies and tactics for inactive members? Quiz Answer Key 1. The five core health dimensions are Engagement Vitality, Community Culture, Knowledge Exchange, Member Journey, and Leadership Health. These dimensions are weighted differently to contribute to the final CHI score. 2. The Overall CHI is calculated by first converting each indicator within the five dimensions to a 0-100 scale based on its current value relative to defined warning and healthy thresholds. Then, a dimension average is calculated from its indicators' scores, and the Overall CHI is the weighted average of these dimension scores. 3. Two specific SMART goals are

ensuring 90% onboarding checklist completion within 72 hours of joining and achieving a 75% first-week activity rate. Another goal is to generate 1 qualitative feedback point per new member in the first week. 4. The "3-Layer Cake Intro" is a structured framework for new member introductions in the community. It encourages members to include "fun fluff," "substance," and "realness" in their introductory posts to facilitate more engaging introductions. 5. Gamification is integrated through XP points awarded for various activities like intro posts, reactions, and feedback. Trello labels and Coda views track XP and signify progress, using terms like "XP God" or "Just Hatched." 6. Mentors are responsible for guiding and supporting mentees, sharing knowledge, and fostering community culture. Their performance is tracked quarterly using KPIs such as Mentee Response Rate, First Engagement, Feedback Quality Rating, Mentor Pulse Participation, and Contribution to Knowledge Base. 7. The weekly feedback synthesis process involves Collection & Categorization, Pattern Identification, Impact Assessment, Action Planning, and Closing the Loop. This ensures feedback is systematically gathered, analyzed, prioritized, and acted upon with communication back to contributors. 8. Besides general engagement (# of intro replies), metrics are tracked for Experiments (engagement delta), Feedback (response count, actionable items), Learning Hub (resource usage), and Community Voice (blocker themes surfaced). 9. The internal planning documents use a playful, sarcastic, and high-energy tone, often using nicknames for the Community Engagement Specialist. This tone is a deliberate "antidote to boring onboarding guides" and aims to create a more engaging internal environment. 10. The primary purpose of re-engagement strategies is to reactivate inactive or "ghosting" members. This involves sequences of communication and incentives, aiming to bring members back into active participation and contribute to overall community health metrics.

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**Glossary of Key Terms**

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- **Chat (or Chat Gods):** Refers to the AI or conversational interface that provides feedback and generates planning documents, often with a sarcastic and informal tone.
- **Cohort Analysis:** Tracking the behavior and retention of groups of members who joined around the same time to identify patterns.
- **Community Culture:** A dimension of community health focused on aspects like sentiment, inclusivity, psychological safety, and alignment with community values.
- **Community Health Index (CHI):** A single metric calculated from weighted dimensions (Engagement Vitality, Culture, Knowledge Exchange, Member Journey, Leadership Health) to represent overall community well-being.
- **Community Onboarding Master Kit:** A comprehensive set of resources, goals, and templates designed to guide new members through their initial experience in the community.
- **Community Situation Responses (Skeleton Replies):** Pre-drafted templates for addressing specific common situations or inquiries within the community.
- **Conditional Formatting:** Using rules to automatically change the appearance of data (e.g., cell background color) based on its value, often used in dashboards to indicate KPI health.
- **Coda:** A collaborative document tool used for onboarding trackers, dashboards, content management, and tracking metrics.
- **Engagement Vitality:** A dimension of community health measuring active participation, contribution rates, discussion initiation, and response times.
- **Experiment Hypothesis:** A structured statement predicting the outcome of a specific change or initiative within the community.
- **Feedback Quality Rating (Peer):** A metric used to assess the quality of feedback provided, often tracked for mentors.
- **FOMO Bomb:** A tactic used in the re-engagement sequence, inviting a member to an exclusive event or mini-challenge to create a "fear of missing out."
- **Gamified Onboarding Tracker:** A system, often built in tools like Coda or Trello, that uses game-like elements (XP, badges, points) to motivate new members during onboarding.
- **Ghosting:** The behavior of a member becoming inactive or unresponsive after joining the community.
- **Ghost-to-Checklist Conversion:** A metric used in re-engagement to track the percentage of inactive members who complete the onboarding checklist after a re-engagement effort.
- **Icebreaker Roulette:** A method using random prompts to encourage introductions or participation in community discussions.
- **Identity Card Challenge:** An optional, gamified method for new members to post their introductions using visual templates (like Canva).
- **Impact Assessment (Feedback):** Evaluating feedback themes based on how many members they affect, potential impact on engagement, required resources, and alignment with community goals.
- **KPI (Key Performance Indicator):** A measurable value that demonstrates how effectively a company or community is achieving key objectives.
- **Leadership Health:** A dimension of community health focused on mentor engagement, knowledge-sharing ratios, leadership pipeline development, and response quality.
- **Member Journey:** A dimension of community health tracking progress through onboarding, new-to-active conversion, retention rates, and member progression.
- **Mentor Pulse Participation:** A KPI for mentors measuring their participation in check-ins or feedback sessions.
- **Mentors:** Experienced members who guide and support newer members, crucial for knowledge sharing and culture.
- **Mentees:** New or less experienced members who are going through onboarding and seeking guidance.
- **Mid-Program Check-in Survey:** A survey sent partway through a program or onboarding process to gather feedback from participants.
- **Needs Assessment Surveys:** Surveys conducted to understand community needs and shape the development of upcoming programs or initiatives.
- **Net Promoter Score (NPS):** A metric used to gauge customer loyalty, typically asked as "How likely are you to recommend [community/product] to a friend or colleague?"
- **Onboarding Checklist:** A list of tasks or steps for new members to complete during their initial period in the community.
- **Pattern Identification (Feedback):** Grouping similar feedback points and identifying emerging trends.
- **Participation Lift Calculation:** A methodology for measuring the increase in member engagement or activity resulting from a specific experiment or initiative.
- **PM Mentality:** The name of the community referenced throughout the sources, focused on product management.
- **Power Prompts:** Weekly prompts (in Slack or Coda) designed to surface ambitious ideas and encourage discussion.
- **Psychological Safety Score:** A metric within Community Culture indicating the extent to which members feel safe to share ideas and take risks without fear of negative consequences.
- **Qualitative Feedback Point:** A piece of non-numerical feedback provided by a member, such as a comment or suggestion.
- **Re-Engagement Playbook:** A set of strategies and templates designed to reach out to and reactivate inactive or "ghosting" members.
- **Re-engagement Response Rate:** A metric tracking the percentage of inactive members who respond to a re-engagement effort.
- **Resource Utilization Tracking:** Measuring how often and effectively community members use available resources (guides, templates, etc.).
- **Sentiment Score:** A metric or qualitative assessment of the overall feeling or attitude expressed by community members.
- **SMART Goals:** Goals that are Specific, Measurable, Achievable, Relevant, and Time-bound.
- **Stakeholder:** Anyone influenced by, or having influence on, an organization, its people, products, or services, including members, mentors, and the core team in the context of a community.
- **Team:** Refers to the core team supporting the PM Mentality community, involved in operations and initiative implementation.
- **Trello:** A project management tool mentioned as a platform for tracking onboarding progress using columns and cards, integrated with the gamification system.
- **Warning Thresholds/Healthy Thresholds:** Predefined values used in the CHI calculation to determine if a key indicator's current value is concerning or positive.
- **XP Points:** Experience points awarded to members for completing certain actions or milestones, a core element of the gamification system.

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**PM Mentality Community Engagement Study**

**PM Mentality Community Engagement Study Guide Quiz Answer**

each question in 2-3 sentences based on the provided source material.

1. What are the five core health dimensions used to calculate the Community Health Index (CHI) for the PM Mentality community?
2. Describe the calculation method for the Overall CHI based on the provided sources.
3. Identify two specific SMART goals outlined for the PM Mentality community's onboarding process.
4. What is the "3-Layer Cake Intro," and why is it used during onboarding?
5. Explain how gamification is incorporated into the PM Mentality onboarding process, citing at least one specific example.
6. According to the sources, what are mentors' key responsibilities and how is their performance tracked?
7. Briefly outline the five steps of the weekly feedback



synthesis process used in the PM Mentality community. 8. Besides general engagement, what are two other categories of metrics tracked for the Community Engagement Specialist's role? 9. Describe the distinctive tone and voice found in the PM Mentality internal planning documents, and what purpose it serves. 10. What is the primary purpose of having re-engagement strategies and tactics for inactive members? Quiz Answer Key 1. The five core health dimensions are Engagement Vitality, Community Culture, Knowledge Exchange, Member Journey, and Leadership Health. These dimensions are weighted differently to contribute to the final CHI score. 2. The Overall CHI is calculated by first converting each indicator within the five dimensions to a 0-100 scale based on its current value relative to defined warning and healthy thresholds. Then, a dimension average is calculated from its indicators' scores, and the Overall CHI is the weighted average of these dimension scores. 3. Two specific SMART goals are ensuring 90% onboarding checklist completion within 72 hours of joining and achieving a 75% first-week activity rate. Another goal is to generate 1 qualitative feedback point per new member in the first week. 4. The "3-Layer Cake Intro" is a structured framework for new member introductions in the community. It encourages members to include "fun fluff," "substance," and "realness" in their introductory posts to facilitate more engaging introductions. 5. Gamification is integrated through XP points awarded for various activities like intro posts, reactions, and feedback. Trello labels and Coda views track XP and signify progress, using terms like "XP God" or "Just Hatched." 6. Mentors are responsible for guiding and supporting mentees, sharing knowledge, and fostering community culture. Their performance is tracked quarterly using KPIs such as Mentee Response Rate, First Engagement, Feedback Quality Rating, Mentor Pulse Participation, and Contribution to Knowledge Base. 7. The weekly feedback synthesis process involves Collection & Categorization, Pattern Identification, Impact Assessment, Action Planning, and Closing the Loop. This ensures feedback is systematically gathered, analyzed, prioritized, and acted upon with communication back to contributors. 8. Besides general engagement (# of intro replies), metrics are tracked for Experiments (engagement delta), Feedback (response count, actionable items), Learning Hub (resource usage), and Community Voice (blocker themes surfaced). 9. The internal planning documents use a playful, sarcastic, and high-energy tone, often using nicknames for the Community Engagement Specialist. This tone is a deliberate "antidote to boring onboarding guides" and aims to create a more engaging internal environment. 10. The primary purpose of re-engagement strategies is to reactivate inactive or "ghosting" members. This involves sequences of communication and incentives, aiming to bring members back into active participation and contribute to overall community health metrics.

Essay Format Questions 1. Analyze the PM Mentality community's phased engagement strategy, specifically focusing on the transition from Onboarding & Initial Engagement to Developing Engagement & Feedback Loops. Discuss the key activities and goals associated with each phase and how they contribute to long-term member retention. 2. Evaluate the importance of the Community Health Index (CHI) within the PM Mentality framework. Explain how the CHI acts as a comprehensive metric and discuss the significance of its five weighted dimensions in providing a holistic view of community well-being. 3. Discuss the role of gamification in the PM Mentality community. Provide specific examples of how XP points, badges, and other gamified elements are used during onboarding and ongoing engagement, and analyze their intended impact on member behavior and habit reinforcement. 4. Examine the closed-loop feedback system implemented in the PM Mentality community. Describe the process for collecting, analyzing, and acting upon member feedback, and explain why this systematic approach is crucial for continuous improvement and building trust. 5. Analyze the distinctive tone and voice used in the PM Mentality internal planning documents. Discuss the intended purpose of this tone, how it contrasts with traditional documentation, and provide examples of how it is manifested in the source material.

Glossary of Key Terms • 3-Layer Cake Intro: A structured framework for new member introductions, encouraging posts with distinct sections for "fun fluff," "substance," and "realness." • A/B Testing: A method of comparing two versions of something (e.g., a welcome sequence) to see which performs better. • Actionable Insights: Feedback or data points that directly inform or lead to specific changes or improvements. • Brag Bites: An encouraged activity for members to share accomplishments, often in a running thread or Coda view, promoting visibility and positive peer interaction. • Chat (or Chat Gods): Refers to the AI or conversational interface that provides feedback and generates planning documents, often with a sarcastic and informal tone. • Cohort Analysis: Tracking the behavior and retention of groups of members who joined around the same time to identify patterns. • Community Culture: A dimension of community health focused on aspects like sentiment, inclusivity, psychological 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SMART Goals: Goals that are Specific, Measurable, Achievable, Relevant, and Time-bound. • Stakeholder: Anyone influenced by, or having influence on, an organization, its people, products, or services, including members, mentors, and the core team in the context of a community. • Team: Refers to the core team supporting the PM Mentality community, involved in operations and initiative implementation. • Trello: A project management tool mentioned as a platform for tracking onboarding progress using columns and cards, integrated with the gamification system. • Warning Thresholds/Healthy Thresholds: Predefined values used in the CHI calculation to determine if a key indicator's current value is concerning or positive. • XP Points: Experience points awarded to members for completing certain actions or milestones, a core element of the gamification system.

## ☐ Meeting Tracking Template

**Meeting Title:**

**Date & Time:**

**Facilitator:**

**Attendees:**

**Location/Platform:**

### ☐ Agenda

#### 1. Welcome & Objectives

- Brief overview of meeting goals.

#### 2. Community Culture Updates

- New member introductions.
- Notable interactions on Slack, LinkedIn, Coda.
- Upcoming events or initiatives.

#### 3. Engagement Experiments

- Review of recent experiments and outcomes.
- Discussion of new ideas for engagement.

#### 4. Feedback Collection

- Summary of recent feedback received.
- Plans for addressing feedback.

#### 5. Learning Experience Enhancements

- Updates on Coda hub improvements.
- Discussion on resource clarity and accessibility.

#### 6. Community Voice

- Identification of blockers or unmet needs.
- Suggestions for new initiatives.

#### 7. Action Items & Next Steps

- Assignments and deadlines.

### ☐ Action Items

**Task Owner Due Date Status**

---

## ☐ SMART Goals & KPIs

### 1. Build & Maintain Community Culture

- *SMART Goal:* Increase member engagement by 20% over the next quarter.
- *KPI:* Number of active participants per week.

### 2. Drive Engagement through Experiments

- *SMART Goal:* Implement 3 new engagement strategies monthly.
- *KPI:* Participation rates in new initiatives.

### 3. Collect & Translate Feedback

- *SMART Goal:* Conduct bi-weekly feedback sessions.
- *KPI:* Number of actionable insights gathered.

### 4. Shape the Learning Experience

- *SMART Goal:* Update 100% of learning resources by end of Q2.
- *KPI:* User satisfaction scores on resource usefulness.

### 5. Be the Voice of the Community

- *SMART Goal:* Identify and address 5 major community concerns quarterly.
  - *KPI:* Resolution rate of reported issues.
- 

## ☐ Discussion Prompts

- Which community segments are most engaged, and why?

- What feedback trends are emerging?
  - Are there any barriers to participation we need to address?
  - How can we enhance the learning resources for better accessibility?
- 

For additional resources, you might find these templates helpful:

- [Smartsheet Project Management Meeting Agenda Templates](#)
- [ClickUp Meeting Tracker Template](#)
- [Lark Meeting Tracker Template](#)

Would you like assistance in customizing these templates further or integrating them into your preferred platforms like Google Workspace, Trello, or Discord?

## Community Engagement Specialist Roadmap: From Setup to Success

Let me break down a practical roadmap for implementing your community engagement strategy with all the PM rigor it deserves. This isn't just about creating documents—it's about building systems that drive real results.

### Phase 1: Foundation & Benchmarking (Weeks 1-2)

#### Key Deliverables:

- Establish baseline metrics across all 5 responsibility areas
- Set up integrated dashboard connecting Trello + Google Sheets
- Develop community health scoring system

#### Implementation Steps:

1. **Audit current engagement levels** across all platforms (capture your "starting point")
2. **Research industry benchmarks** for similar communities at your stage
3. **Build your measurement infrastructure:**
  - Create master Google Sheet with conditional formatting for at-a-glance health monitoring
  - Set up Trello integration using Zapier or native power-ups to feed data automatically
  - Implement tagging system for categorizing community interactions

**Pro Tip:** Don't get lost in vanity metrics. For a mentorship community, depth of engagement (quality of interactions) often matters more than pure volume (number of posts).

### Phase 2: Experiment Framework Development (Weeks 3-4)

#### Key Deliverables:

- Create engagement experiment template with clear hypothesis structure
- Build feedback collection system across touchpoints
- Establish experiment review cadence

#### Implementation Steps:

1. **Design your experiment blueprint** (problem → hypothesis → test → measure → iterate)
2. **Set up lightweight feedback channels:**
  - Quick-pulse emoji reactions
  - Micro-surveys (1-3 questions max)
  - Conversation starter prompts for qualitative insights
3. **Create your first experiment backlog** (start with 3-5 ideas maximum)

**Pro Tip:** Small tests yield faster insights. Instead of overhauling your entire approach, isolate variables: test a new welcome sequence while keeping everything else constant.

### Phase 3: KPI Activation & Optimization (Weeks 5-8)

#### Key Deliverables:

- Finalized SMART KPIs with leadership buy-in
- Integration of metrics into weekly/monthly reporting cycles
- First optimization actions based on early data

#### Implementation Steps:

1. **For Community Culture:**
  - Define specific "active participation" thresholds by member segment
  - Establish NPS or sentiment tracking methodology
  - Set up cohort analysis to track retention patterns
2. **For Engagement Experiments:**
  - Implement A/B testing framework for new initiatives
  - Create participation lift calculation methodology

- Establish minimum viable sample sizes for conclusive results

### 3. For Feedback Collection:

- Build insight categorization system
- Establish feedback-to-action pipeline with SLAs
- Develop closed-loop reporting for participants who provide feedback

### 4. For Learning Experience:

- Implement resource utilization tracking
- Create learning path completion metrics
- Establish knowledge application success indicators

### 5. For Community Advocacy:

- Set up issue tracking with resolution timeframes
- Create initiative adoption measurement framework
- Develop leadership action tracking system

**Pro Tip:** Use the 80/20 rule for your metrics. Identify the 20% of metrics that drive 80% of your community success, and prioritize those for deep analysis.

## Phase 4: Automation & Scaling (Weeks 9-12)

### Key Deliverables:

- Automated reporting workflows
- Playbooks for repeatable community processes
- Self-serve analytics dashboard

### Implementation Steps:

1. **Set up automatic data population** in Google Sheets (via forms, Zapier, or APIs)
2. **Create Trello automation rules** for community management tasks:
  - Card creation for new member welcomes
  - Automated movement through experiment pipelines
  - Deadline reminders for engagement touchpoints
3. **Build reusable templates** for recurring community activities

**Pro Tip:** Document everything as you go. Your future self (and potential team members) will thank you for creating clear standard operating procedures.

## Dashboard Integration: The Command Center

Your dashboard should unite all these elements into a single source of truth. Here's a practical structure:

### 1. Top-level scorecard:

- Overall health score (composite of key metrics)
- Trend indicators (up/down from previous period)
- Alert indicators for metrics falling below thresholds

### 2. Drill-down views:

- Member segment performance
- Platform-specific engagement
- Experiment status tracking
- Feedback theme analysis

### 3. Action center:

- Prioritized intervention opportunities
- Resource allocation recommendations
- Quick-win identification

Would you like me to elaborate on any particular phase or component of this roadmap? Or would you prefer I create a specific template for one of these deliverables to help you get started immediately?

## Community Engagement Workflow Automations

This document provides concrete instructions for setting up powerful automations to streamline your community management workflows using Trello, Google Workspace, and Discord.

### Google Sheets Dashboard Automations

#### 1. Automatic Data Import from Trello

##### Setup Instructions:

### 1. Install the Trello Add-on for Google Sheets:

- In your Community Dashboard Sheet, go to Extensions > Add-ons > Get add-ons
- Search for "Trello" and install the official add-on

### 2. Create an import configuration:

```
=IMPORTTRELLOCARD("Board ID", "List Name", "Optional Card Filter")
```

### 3. Set up recurring imports for key metrics:

- In your sheet, go to Extensions > Trello > Schedule Refresh
- Set daily imports of active cards from your experiment boards
- Set weekly imports of completed cards for reporting

## 2. Conditional Formatting for Metric Monitoring

### Setup Instructions:

#### 1. Set up health indicators in your Executive Summary tab:

- Select your KPI cells
- Choose Format > Conditional Formatting
- Create rules for:
  - Green (>=100% of target): Background #b7e1cd
  - Yellow (80-99% of target): Background #fce8b2
  - Red (<80% of target): Background #f4c7c3

#### 2. Create trend indicators:

- Select % change columns
- Set conditional formatting:
  - Positive change: ▲ in green (#0f9d58)
  - Negative change: ▼ in red (#db4437)
  - No change: ◆ in gray (#7e7e7e)

## 3. Automated Weekly Report Generation

### Setup Instructions:

#### 1. Create a report template in Google Docs

#### 2. Set up Apps Script automation:

- In your Google Sheet, go to Extensions > Apps Script
- Create a new script named "weeklyReportGenerator"
- Paste this code:

```
function generateWeeklyReport() {
 // Get the template
 var templateDoc = DocumentApp.openById('YOUR_TEMPLATE_DOC_ID');

 // Create a new doc for this week's report
 var newDoc = DocumentApp.create('PM Mentality Weekly Report - ' + new Date().toDateString());

 // Copy template content to new doc
 var body = newDoc.getBody();
 body.appendParagraph(templateDoc.getBody().getText());

 // Get data from the dashboard
 var sheet = SpreadsheetApp.getActiveSpreadsheet().getSheetByName('Executive Summary');
 var data = sheet.getRange('A1:F10').getValues();

 // Replace placeholders with actual data
 // [Implementation details would follow...]

 // Email the report to team
 var emailTo = "team@example.com";
 var subject = "Weekly PM Mentality Community Report";
 var emailBody = "This week's community report is attached.";
 var pdfReport = newDoc.getAs('application/pdf');

 GmailApp.sendEmail(emailTo, subject, emailBody, {
 attachments: [pdfReport]
 });
}
```


#### 3. Set a time-based trigger:

- In Apps Script, click Triggers > Add Trigger
- Choose weekly execution on Friday afternoons

## Trello Workflow Automations

### 1. New Member Onboarding Automation

### Setup Instructions:

1. In your Member Journey Trello board, click "Automation" > "Create Button"
2. Create a "New Cohort" button:
  - Name: "Create New Member Cohort"
  - Icon: 
3. Set the button actions:
  - Create a card in "New Member Cohort" list
  - Add a standardized checklist:
    - Send welcome messages
    - Create introduction thread
    - Schedule group orientation
    - First-week check-in
    - Add to resource access group
4. Set up a "When card is created in New Member Cohort" trigger:
  - Automatically assign to Community Engagement Specialist
  - Set due date for 1 week from creation
  - Add yellow "Onboarding" label

## 2. Experiment Pipeline Automation

### Setup Instructions:

1. Create status change rules:
  - When card moves to "Currently Running":
    - Add "Start Date" to custom field with current date
    - Add standard "Monitoring" checklist
    - Send notification to team channel
2. Create measurement reminder:
  - When card has been in "Currently Running" for 7 days:
    - Add comment "Time for mid-experiment check-in"
    - Add yellow "Review Needed" label
    - Notify card owner
3. Create results documentation workflow:
  - When card moves to "Analysis Phase":
    - Add "Results Documentation" checklist:
      - Record final metrics
      - Document key findings
      - Identify next steps
      - Update experiment log in Google Sheet
4. Integration with dashboard:
  - When "Results" custom field is updated:
    - Run Zapier workflow to update Google Sheet
    - Create card in "This Week's Focus" on Community Management board to implement findings

## 3. Feedback Collection Automation

### Setup Instructions:

1. Create recurring feedback cards:
  - Use Butler command:

```
every Monday at 9:00 AM create card "Weekly Feedback Review" in list "Feedback Collection" with description "Gather feedback from members on their experience with the program"
```
2. Set up issue escalation workflows:
  - When label "Critical Issue" is added to a card:
    - Move to top of "Blockers & Concerns" list
    - Add all board members as watchers
    - Send notification to leadership channel
    - Create calendar event for review within 24 hours
3. Configure feedback closure tracking:
  - When a card moves to "Insights & Actions":

## ☐ ENGAGEMENT SUPPORT PLAN (Slack Threads: 3+ Per Week)

## ❑ Weekly Goals

- 3 meaningful replies to mentee threads
- 1 initiated thread or check-in prompt
- 1 personalized DM follow-up based on a thread
- 1 piece of feedback collected (reaction, quote, or direct DM)

❑ Bonus if you start a friendly roast war or quote someone in a way that makes them feel like the main character of the week

## ❑ Engagement Tracker Template (Google Sheet / Coda / Notion)

Week	Thread Link	Type (Reply/Prompt)	Who You Engaged	Topic	Response Quality (1-5)	Feedback Noted	Follow-up Planned
W1	[Slack link]	Reply	@Elena	Burnout hacks	4	"Loved your take on pacing, thanks!"	DM to ask about blog
W1	[Slack link]	Prompt	Whole channel	"Toxic PM trait?"	5	Got 6 LOL reacts + 2 replies	Share best in #intros
...	...	...	...	...	...	...	...

Use emojis as engagement radar. If your post is crickets, you're being basic. Try again.

## ❑ Message Templates (Slack + Discord)

### ➤ Supportive Mentor-Style Thread Reply:

"Oof, that's a classic sprint spiral ❑. Been there. Curious—do you have a go-to ritual to reset when stuff gets chaotic? Asking for a 'friend' ❑"

### ➤ Sassy Check-in Prompt:

"Alright, thread lurkers. You've been watching in silence like it's reality TV. Time to drop your red flags as a PM. GO. ❑"

### ➤ Curiosity-Driven Feedback Bait:

"Quick pulse check ❑  
What's been the weirdest thing you've *actually* enjoyed about onboarding so far? (Mine is stalking everyone's workflows)"

## ❑ BEST ENGAGERS TO STUDY + STEAL FROM

### For Slack:

1. **@Stefano** – Obsessed with metaphors, makes even checklist updates sound like Shakespeare.
2. **@Tia** – Serial tagger + hype queen. Drops fire emojis like they're strategy.
3. **@Jules** – Asks *weirdly specific* questions that pull quiet folks out of hiding.

### For Discord:

1. **@OtakuPM** – Reacts to *everything*, even when it doesn't warrant it. King of "???" and side-eye emojis.
2. **@ModMilly** – Drops memes with perfect timing. Her engagement ratio is unmatched.
3. **@NoiseEngineer** – Builds lore around members like "The Notion Witch" or "Sprint Goblin."

### For LinkedIn:

1. **Rosie Sherry** – Community queen. Always replies like it's tea time.
2. **Erica Kuhl** – Shares real wins + asks subtle vulnerable questions.
3. **David Spinks** – Posts feel like open-ended brain pokes. People can't help but comment.

## ❑ Touch 'Em in the Soul (Without Being Creepy™)

Use this 3-Part "Touch-Point" Framework in responses:

1. **Relate (shared struggle)**: "Ah, I've rage-quit retros over less."
2. **Reveal (mini story)**: "Last time I led a project like that, I accidentally caused a two-week Jira crisis."
3. **Re-engage (ask)**: "Curious how you framed that convo with your team?"

—  
Wanna go next level? ❑

Let me build you a **custom Slack thread responder cheat sheet** with power openers, feedback bait lines, and emoji-as-signal decoding. Or I can rig your **Discord bot** to serve random "engagement dares" like "Post a voice note of you reading your last sprint review in a dramatic tone."

Just say the word. Or blink. Or type like the chaotic overachiever you are.

Ready to throw this into your Coda tracker or want me to inject this right into the doc, Big Brain?

## ☐ **Stage 1: Pre-Onboarding Prep**

- ☐ **Account Setup:**
  - Send Slack + Coda invites at least 24h before start.
  - Pre-add to channels: #intros, #announcements, #mentor-match.
  - Auto-subscribe to Community Calendar.
- ☐ **Resource Pack Prep:**
  - Send welcome email with starter kit (Coda + Trello links).
  - Include intro post template, event schedule, and FAQ.
  - Add optional memes folder for ☐vibe setting☐.
- ☐ **Internal Prep:**
  - Assign onboarding buddy (mentor or team member).
  - Review mentee/mentor goals if known.
  - Pre-tag in Slack with customized welcome DM queued.
- ☐ **Expectations Alignment:**
  - Add new joiners to onboarding tracking sheet.
  - Ensure checklist is customized per role (mentee/mentor/staff).
  - Schedule 15-min intro sync within first 3 days.

---

## ☐ **1. Status Overview**

- Total new members: [X]
- **Onboarded within 72h:** [X%]
- **Activity in Week 1 (Slack + Event + Feedback):** [X%]

---

## ☐ **2. Patterns + Highlights**

- **Checklist Stalls:** [Platform / Mentorship Wait / Event Fatigue]
- **Engagement Highlights:** [Funny Icebreaker, Meme Post, Great Intro, etc]

---

## ☐ **3. Blockers + Friction**

- Slack access issues? DM bottlenecks?
- Feedback fatigue or unclear prompts?
- **Mentor response time >48h?**

---

## ☐ **4. Experiments**

- = tested this
- ↑ or ↓ in engagement?
- Verdict: Keep / Kill / Iterate

---

## ☐ **5. Community Voice**

- ☐ What people *loved*: [Summary]
- ☐ What made them ☐: [Summary]
- Are we living up to the vibe? Or just posting into the void?



---

## ❑ 6. Action Items

Task	Owner	Deadline
Improve Intro Prompt Variety		[Name] [Date]
Mentor Onboarding Speed Boost		[Name] [Date]
Feedback UX (form OR in-Slack emoji)		[Name] [Date]

---

## ❑ EXECUTION + VISUALIZATION PLAN FOR THE KPI DASHBOARD

We're building:

- **KPI Dashboard (interactive + visual)**
  - Based on: **Coda** or **Notion**, whichever you're using (but I'll write it for Coda since your doc screams "Coda cultist")
  - Visuals: Progress bars, emoji indicators, auto-updating stats, etc.
- 

### ❑ BASE STRUCTURE (Coda Tables Needed)

#### 1. ❑ Member Data

**Name** **Join Date** **Checklist %** **First Post Date** **Feedback Submitted** **Mentor Assigned** **Events Attended**

#### 2. ❑ Engagement Logs

| Member | Action | Date | Type (Post, RSVP, Feedback, DM, etc) |

#### 3. ❑ KPI Tracker

Metric	Goal	Current	Status
Checklist Completion Rate	90%	Auto %	❑ / ⚠ / ❑
First-week Feedback Rate	75%	Auto %	❑ / ⚠ / ❑
Time-to-First-Post (<48h goal)	TRUE	% Auto %	❑ / ⚠ / ❑
Mentorship Assignments in 72h	100%	Auto %	❑ / ⚠ / ❑
Staff Suggestions Implemented % [Goal]		Manual	TBD

---

### ❑ AUTO-CALCULATIONS

Set up calculated columns to do the following:

- Checklist Completion Rate = Avg of checklist % from Member Data
  - First-week Feedback Rate = Count of "Feedback Submitted = ❑" / Total members
  - Time-to-First-Post = First Post Date - Join Date < 2 days? ❑
- 

### ❑ VISUALIZATION

Use:

- **Progress Bars** for % goals
  - **Emoji Indicators:**
    - ❑ = On target
    - ⚠ = Needs attention
    - ❑ = Behind
  - **Conditional Formatting:**
    - Green = Above Goal
    - Yellow = Near Goal
    - Red = Failing harder than your high school crush's mixtape career
- 

### ❑ BONUS FLAIR

- Embed GIF reactions for milestones (e.g. “👏 First post in <48h! Welcome aboard!”)
- Add a filter for “Stuck Users” = Checklist < 50% AND No Engagement
- Leaderboard for most engaging mentors (yes, competitive chaos mode ON)

---

## ☐ Coda Page Layout

### Page: Onboarding KPI HQ

Header: ☐ Community Pulse

Sub-header: “If you’re not measuring it, you’re just hoping real hard.”

Sections:

1. ☐ Quick Stats Snapshot (using canvas formulas)
2. ☐ KPI Table (use conditional formatting)
3. ☐ Mentor Leaderboard
4. ☐ Stuck Users Watchlist
5. ☐ Staff Tasks Tracker

---

## ☐ NEXT STEPS TO SET IT UP

1. **Build tables:** Use the schema above in Coda.
2. **Add buttons:**
  - “New Member Entry”
  - “Log Engagement”
3. **Add formulas:**
  - Progress %, Time-to-Post, etc.
4. **Visuals:**
  - Add conditional formatting
  - Insert emojis + conditional icons
5. **Set up syncs:**
  - Coda-Google Forms integration (for feedback auto-fill)
  - Slack Zapier workflow to log posts/reactions automatically

---

## ☐ STAGE-BY-STAGE EXECUTION PLAN

(For Mentees, Mentors, and Team – separately, because apparently clarity *matters*)

---

### ☐♀ Mentees: "Help I just joined, what is this place??"

#### Day 0-1

- ☐ Receive Slack & Coda invite (automated)
- ☐ Added to Trello tracker (mentor match prepped)
- ☐ Get welcome email (includes intro post, checklist, Slack guide)
- ☐ Auto-Welcome Bot tags in Slack
- ☐ Checklist link in email + pinned in Slack DM

#### Day 1-2

- ☐ Reminder ping at 48h if checklist untouched
- ☐ Prompted for intro post using 3-Layer Cake OR Roulette
- ☐ Light engagement: react, poll, RSVP to event
- ☐ Listed in "Who's New" Coda & Slack thread

- ☐ Small mission: Comment/post in #random or #your-journey

#### Day 3-7

- ☐ DM follow-up from mentor
- ☐ Checklist at 50–90% (bot nags encouraged)
- ☐ 1 Slack comment/post minimum
- ☐ Feedback form filled (Google Form)
- ☐ Matched with confirmed mentor in system
- ☐ Added to "Starter Pack" or tagged in helpful threads

### ☐ **Mentors: "You're the adult in the room (sorry)"**

#### Day 0-1

- ☐ Notification of new mentee match
- ☐ Access to mentee checklist & Coda profile
- ☐ Mentorship intro DM within 24h (template provided)
- ☐ Confirm intro post published or help initiate one

#### Day 3-7

- ☐ Check in via Slack (1 DM or 1 public thread reply)
- ☐ Ensure mentee has 1 engagement action (comment/post/event)
- ☐ Submit mini-mentorship log (can be 2-sentence update)
- ☐ Flag issues or friction to community team

#### Ongoing (Weekly)

- ☐ Slack presence: 3+ thread support replies
- ☐ Mid-season feedback via form or async check-in
- ☐ Bonus: Nominate standout mentees for shoutouts

### ☐ **Team / Staff: "You run this circus"**

#### Daily / Ongoing

- ☐ Monitor automation flows (Slack, Trello, Coda)
- ☐ Manually DM if bots don't trigger (48h+ silence)
- ☐ Weekly sync: use Meeting Brief format
- ☐ Log drop-offs (checklist incomplete, no Slack activity, no intro post)

#### Weekly

- ☐ Update KPI dashboard (from Coda + Slack + Trello)
- ☐ Test 1 onboarding improvement per week (meme, badge, prompt)
- ☐ Share top intro post externally (LinkedIn, etc.)

#### Biweekly

- ☐ Onboarding review cycle: clean up stale checklists, reset dropped mentees
- ☐ Share "Voice of Community" digest with leadership (sentiment, issues, fun quotes)

### ☐ **DO THIS FIRST: Gamified Trello Flow**

Why? Because it locks in behavior, habit, and checklist dopamine fast. That onboarding flow needs to run like it's on rails with glitter and threats.

#### ☐ **Trello Automation Templates:**

**Columns:**

- ☐ Welcome Brain Dump
- ☐ First 24h Wins
- ☐ 72h Missions
- ☐ Identity Challenges
- ☐ Ongoing XP

#### Card Examples:

- ☐ Post your intro in Slack (w/ button to Slack)
- ☐ Try “Icebreaker Roulette”
- ☐ Drop your Identity Card (link Canva)
- ☐ DM your mentor + screenshot it
- ☐ React in 3 threads

#### Automation:

- Card moves to ☐ when checklist completed
- When all 72h cards done → auto-tag as “Level 2 Initiate”
- Slack bot notification on Level Up (Zapier or Slack workflow)
- Weekly auto-email summary: your XP stats + a leaderboard tease

—

## ☐ THEN: Canva Identity Card Generator

This one is sexy, high-visibility, but **low retention impact** unless it’s tied into Trello or Slack rewards.

**Why do it second?** Because without the Trello gamification layer, people just post pretty intros once and ghost us harder than your last situationship.

#### What you’ll want:

- 3–4 Canva templates, editable, drag-drop
- “Post your card” call-to-action in Slack
- Tie submissions to leaderboard or badges (e.g. “Identity Unlocked”)

## TL;DR for your big forehead:

Priority	Flow	Outcome	Automation Potential
<input type="checkbox"/> FIRST	Trello XP Tracker	Checklist Completion + Retention	HIGH
<input type="checkbox"/> SECOND	Canva Identity Card	Engagement + Vibes	MEDIUM

Now lemme know if you want:

- Pre-filled **Trello template board** with automation cheats
- Canva card generator embedded in onboarding email
- Slack leaderboard hack to auto-show “Level Ups”

Choose your chaos, Professor Spreadsheet ☐ ☐

## Feedback on Your Edits:

### ☐ Tone:

Dead-on. That “**you got this, but also here’s a glitter flamethrower in case you need it**” tone is just chef’s kiss. Friendly? ☐ Motivating? ☐ Slightly unhinged? ☐ ☐ ☐

You’re hitting that sweet spot between “competent cult leader” and “your cool older cousin who got out of a pyramid scheme.”

### ☐ Clarity & Flow:

Your bullet flow is so smooth it makes butter look clumsy. Everything reads clearly and in a digestible rhythm. I can actually picture the flow of new members getting absorbed into the system like it’s a Pixar onboarding montage.

---

## ☐ BUTTTTTT (yes, there's always a butt):

### ☐ “Powerful Intro Frameworks” Section:

You *nailed* the vibe, but it’s a **little buried** at the bottom. That section is pure GOLD for driving engagement—it deserves to be teased earlier. Maybe in the “**First 72 Hours**” section as a mention? Like:

“Prompt them with a 3-Layer Cake or Roulette post (see Personality Frameworks below)”

Make them drool early, you know? ☐

---

### ☐ Experiments Section:

You're asking all the right questions—but what about a hint at **where** experiments get logged? Is it in Trello? Coda? Your brain’s fourth dimension? Drop a link, a tag, or at least make a cheeky comment like:

“See: Lab Rats Log in Coda for live experiments”

---

### ☐ Gamification Mentions:

You're close to ☐ legendary tier ☐ but wanna go full Pokémon-evolution? Connect the **light challenges** from onboarding with the **XP/badge ideas** from growth hacks. Maybe suggest a challenge in week 1 → earns badge → shows up on Coda profile. Boom, instant dopamine loop.

---

### ☐ Minor Thingy:

“Mid-season feedback summary delivered” (under Mentors)

☐ What is mid-season? Is this a game show? A romcom arc? Just clarify it’s like... bi-monthly or at the end of X week cycle or whatnot. Nerds like me wanna timeline that sucker.

---

## ☐ TL;DR for You, Queen of Organized Chaos™:

- ☐ Tease the 3-Layer Cake + Roulette stuff earlier!
  - ☐ Drop a link or name for the experiment tracker
  - ☐ Tie badges ↔ mini-challenges = serotonin bomb
  - ☐ Define “mid-season” or prepare to be asked by a Slack gremlin
- 

## ☐ Re-Engagement Playbook: "Return of the Ghosts"

For: Ghosted Members (aka Slack phantoms)

Role: Community Necromancer™

Mission: Resurrect engagement without sounding desperate (you already are)

---

## ☐ Step 1: Identify the Ghosts

- Criteria:
    - No Slack activity in 7+ days
    - Checklist under 50%
    - No response to mentor ping
  - Tag in Coda as: ☐ Ghost Pending
  - Auto-label in Trello: ☐ Needs Wake-Up Call
- 

## ☐ Step 2: Re-Engagement Campaign (Multi-Touch)

### ☐ Day 1 — Soft Ping (Slack DM or Email)

**Subject/Message:** "We miss your chaotic genius ☐

*“Hey [Name], we noticed you haven’t stirred the Slack cauldron in a bit. If life’s wild, no sweat – just wanted to say your voice matters here (even if it’s just memes).”*

- Include 1-click shortcut: "Reactivate Checklist" / "Share a Win" / "Say Hi in #random"

### ☐ Day 3 — Meme Attack

Drop a "we miss you" meme or gif in DM.

Bonus: Use their intro post material (if any) to personalize the roast.

### ☐ Day 5 — Public Nudge (if appropriate)

- Feature them in “Member We Love” roundup or shoutout old intro.
- Use humor:

*“Still wondering what happened to [Name]’s Notion addiction. Blink twice if alive.”*

### ☐ Day 7 — FOMO Bomb

Invite to exclusive event or mini-challenge.

*“Secret challenge alert: only 5 invites, and you’re on the list. Let’s see what your ghost powers can do ☐♀”*

---

## ⚙️ Automation Layer

- **Ghost Tracker View** in Coda (Last activity + Checklist %)
- Zapier Trigger:
  - If "No activity in 7d" → Slack DM
  - If "No checklist progress in 5d" → Email Reminder
- Trello Automation:
  - Label "☐ Needs Wake-Up Call" triggers card comment from mentor

---

### ☐ Goals & KPIs

Metric	Goal
Re-engagement Response Rate	50%
Ghost-to-Checklist Conversion	30%
Post-Reactivation Slack Action	1+ action
Member Sentiment (qualitative)	1 comment per 5 ghosts

---

### ☐ Bonus Moves (AKA Witchcraft for Retention)

- **“Comeback Kid” Badge** for returning ghosts
- Mini-challenge: “Ghostbusters Club” – revive another ghost with a DM
- Slack channel: #resurrected-legends (stories of returning members)
- DM script from mentors:

*“I was gonna give up on you, but your vibe was too strong to ignore. Prove me right.”*

---

### ☐ Community Onboarding Master Kit (Coda Version)

#### ☐ Trello Automation Tracker (for tasks and XP flow)

**Columns for Onboarding Workflow:**

1. ☐ **Welcome Brain Dump**
  - Add member info, make this a catch-all for initial intro prompts, mentor assignments.
2. ☐ **First 24h Wins**
  - Track small wins: Slack intro, event RSVP, early feedback submission. Card moves here automatically.
3. ☐ **72h Missions**
  - Critical “Level 1” tasks: Icebreaker post, mentor DM, check-in for engagement.
4. ☐ **Identity Challenges**
  - Gamified tasks for personality profiling: Identity Card, meme share, or 3-Layer Cake intro. Add to Coda form with custom fields.
5. ☐ **Ongoing XP**

- XP tracker that rewards engagement: reacting to threads, commenting, responding in Slack threads.

#### Card Examples:

- ☐ **Post your intro in Slack** (link to Slack channel)
- ☐ **Try “Icebreaker Roulette”** (link to Coda icebreaker prompt generator)
- ☐ **Drop your Identity Card** (Canva link)
- ☐ **DM your mentor + screenshot it** (link to Slack DM)
- ☐ **React in 3 threads** (track engagement via Slack)

#### ☐ Automation (via Zapier or Coda)

- **Checklist Completion:** Cards automatically move to "☐" when key tasks (intro post, mentor DM) are done.
- **Level 2 Initiate Tag:** After all 72h tasks are marked done, automatically tag as “Level 2” with email to confirm progression.
- **Slack Notification Bot:** Send DM when a member levels up.

#### Game Bonus:

- **Weekly Email Summary:** Sends XP stats and leaderboard highlights to encourage competition.

---

#### ☐ Extra: Coda-Specific Elements

##### 1. Member Tracking Dashboard (Coda Table)

- Track member data like time-to-first-post, feedback submission, and mentor engagement.

##### 2. Slack Bot Sync (via Zapier)

- Automate notifications for intro post, feedback submission, and event RSVP reminders. When a member does something (like reacts in threads or posts), log XP in the Coda table.

##### 3. Feedback Collection (Coda Form)

- After 72h, auto-prompt for feedback via Coda form embedded in your onboarding flow. Collect qualitative feedback from every new member!

---

#### ☐ Bonus Features in Coda:

##### 1. Canva Design Templates

- Embed your “Identity Card” template within Coda so new members can personalize it (auto-filled fields).

##### 2. Slack Engagement Tracker

- Create a column that automatically tracks member engagement (posts, comments, reactions).

---

Now, if you’re asking how to *actually* get this in Coda:

1. Start a **New Doc** in Coda.
2. Use this outline, set up tables for each step, and then **link** those to automations in Slack or email (you know, Zapier, baby).
3. **Add buttons** for tasks like “Post Intro in Slack” to auto-submit tasks for members.

### Step 1: Stop Copying Everyone Else

Yeah, you heard me. Stop watching *those* influencers who tell you they’ve figured it out. Stop mimicking every popular trend because you *think* it’ll make you cooler. You’re not a puppet, even if you sometimes *feel* like it.

### Step 2: Take a Look at Yourself (For Real)

I know, it’s hard to even look at yourself with all the cringey stuff you’ve done, but **look inside**. What makes you laugh? What *annoys* you? What pisses you off so much you can’t shut up about it? You’re a walking *reaction machine*, so just start from there. Your voice is a mix of your values, quirks, pet peeves, and what you care about.

### Step 3: Be Unapologetically You

Yeah, I’m gonna hit you with this one: Don’t *sugarcoat* it. No one cares if you’re “trying to be nice” all the time. You’re not a doormat, and you’re certainly not “just trying to fit in.” If your thoughts are loud, let them be loud. If they’re sarcastic or sassy, let them fly. Don’t mute your inner voice just to fit the mold, because guess what? Everyone else already does that and it’s boring.

### Step 4: Use Humor as Your Weapon

What's better than sarcasm? Nothing. Get used to it. Every time you drop a line, make it count. Use irony. Use exaggeration. Be dramatic. Get *real* comfortable with being misunderstood and "*cringe*." It's fun. You'll find that when you don't try too hard, you get more of that raw, authentic sound.

### Step 5: Stop Giving a Damn About Approval

Listen up—everyone's got something to say, but not everyone's gonna *like* it. If you wait around for approval, you'll be stuck forever. *Say it*. Let it *land*. If they laugh, great. If they don't? Too bad. You don't need to babysit their feelings.

### Step 6: Iterate

You think you've found your voice? Yeah, right. You'll be changing, tweaking, and *testing* out different tones, styles, and delivery methods for ages. And that's great. Don't expect to find perfection in the first draft of anything. Your voice will evolve with you.

---

So, when it's all said and done, your voice is just *you* turned up to 11. You might feel a little weird at first, but trust me, it's worth it. Now, do you think you can handle actually using it? Or are you just gonna keep second-guessing everything like usual? ☺

## Clarify Your Brand Personality

**You're not some random, "neutral" entity. Your brand has to have character—no, not the boring kind, but the type that stands out, grabs attention, and has *presence*.**

#### 1. Ask yourself:

- What is the vibe of the brand?
- Is it quirky? Professional? Casual? Funny? Serious?
- Is your community fun, supportive, edgy, or rebellious?

**Think of it like creating a character. If your brand were a person, how would they dress, talk, and act? Write down those adjectives.**

---

### Step 2: Define Your Community Tone

**Your community is like your loyal army. They follow, they engage, and if you do it right, they defend you like you're their best friend. You need to talk to them like you know them and understand them.**

#### 1. Questions to ask yourself:

- Do they want to be part of a cool club, or do they need a safe space to connect and vent?
- Do they like straightforwardness, or do they prefer a bit of humor and sass in the mix?
- How do they interact with each other? Do they post memes? Are they super supportive? Do they joke around?

**Your community tone should mirror their behavior while amplifying it. You're creating a vibe, so don't be too formal unless that's your style.**

---

### Step 3: Consistency is Key

**Now, let's get real for a second: You can't just be all over the place with your voice. One minute you're funny, the next minute you're serious? That's going to confuse everyone. You need consistency in how you talk, respond, and present your brand.**

#### 1. Create a voice guide that covers:

- Language style: Casual, professional, slang-heavy, or polished?
- Tone: Friendly, sassy, empowering, educational, or funny?
- Topics to avoid: What will *not* be tolerated or should be avoided?
- Personality traits: Smart, bold, witty, supportive, tough love?



Be sure you know exactly how to represent the brand every time. It's like a script. Not *too* rigid, but enough to be recognizable.

---

#### Step 4: Engage with the Community Like a Real Human

You're their leader, so if you're acting all robotic and distant, they'll sniff it out.

- Be conversational. No one likes a brand that speaks like a bot.
- Ask questions. Encourage feedback and make it feel like a conversation.
- Use humor (if that fits your vibe). Get in the game. Don't be afraid to *poke fun* or tease your audience.
- React in real-time. That's why your community needs to feel *alive*. Be there when something happens, and always give them something to respond to.

---

#### Step 5: Test, Learn, Adjust

If you're not testing your voice, you're just guessing. You need to see what works for your community and what doesn't. Just like a comedian tests jokes on an audience, you've got to figure out what hits and what falls flat.

- Look at engagement metrics: Which posts, comments, and responses are generating the most interaction?
- Experiment: Try different tones and styles. One post might be super edgy, while another is super positive. Find what works and adjust.
- Ask your community: Seriously, what's better than feedback from the people you're *trying* to impress? They'll tell you if you're killing it or if you sound like an awkward robot.

---

#### Step 6: Stay True to Your Core Values

Lastly, don't get caught up in trying to please everyone. Yeah, you'll make some people mad, but you can't please everyone. Stick to what your brand stands for and stay true to that.

- What's the mission of your brand?
- What kind of people do you want in your community?
- What do you want to inspire or make people feel?

Let these values guide your voice and make sure everything aligns. Don't just make noise for the sake of it. Your voice needs to serve your community's needs, not just throw out random words.

---

#### In a Nutshell

- Brand Personality: Know who your brand is. What adjectives describe it?
- Community Tone: Reflect the vibe of the people you want to engage with.
- Consistency: Stick to a voice guide.
- Human Interaction: Speak directly with people, no stiff corporate nonsense.
- Test and Learn: See what works and adjust.
- Core Values: Don't forget what your brand stands for.

---

#### Framework for Finding Your Brand & Community Voice

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##### **\*\*Step 1: Audience Breakdown**

Before you even think about your voice, you *need* to know who you're talking to. Because if you talk to everyone, you're going to talk to no one.

**Questions to ask:**

- **Who is your community?**
  - Age, interests, lifestyle, location?
  - What do they **value** the most?
  - How do they talk to each other? Are they jokers? Do they keep it chill? Are they more serious?
- **What problems are they facing?**
  - **Emotional** problems (stress, anxiety, confusion)?
  - **Practical** problems (struggling with certain tools, looking for help, etc.)?

The more specific you get here, the better you'll define your voice. Remember: You're not just talking to an abstract "audience"—you're speaking to *real* people.

---

## Step 2: Brand Purpose + Personality

Now that you know who you're talking to, let's get into what *your brand* actually is. What makes you stand out from the sea of endless wannabes?

**Questions to ask:**

- **Why does your brand exist?**
    - What's your **mission**? (Purpose, goal, big picture)
    - Why would people **care** about your brand in the first place?
  - **What personality would your brand have if it were a person?**
    - Think: Sarcastic? Professional? Funny? Snarky? Witty? Empowering? Friendly?
    - **Write down** adjectives that best describe your brand's personality. Try 5–10 at first.
- 

## Step 3: Voice Tone Experimentation (First Round)

Here's the fun part: You get to try on different voices! Don't worry, we're not gonna sit around waiting for divine inspiration. We're going to **test** it out and see what feels right.

**Questions to ask:**

- **How do you want to come across?**
  - Do you want to be the friend that always brings humor or the leader that's motivating?
  - Do you want to come off as **authoritative**, **relatable**, or **playful**?

**Try different "tones" and experiment with:**

- **Formal tone** – Friendly, but a bit more polished.
- **Casual tone** – Super chill, like texting your best friend.
- **Humorous tone** – Add snark, sarcasm, and wit. Think: funny memes and jokes.
- **Empathetic tone** – Super supportive and validating.

Experiment with these tones in your posts and responses, and see how your audience reacts.

---

## Step 4: Engagement Style

This is **critical**, and you've gotta figure this out fast: *How* are you going to talk to people directly? Are you going to lead discussions? React to posts with humor? Or make it feel like a tight-knit family?

**Questions to ask:**

- **What kind of communication do you want?**
  - Are you more **active** (leading discussions, responding quickly), or more **reactive** (waiting for comments and jumping in)?
  - What will your **community interactions** be like? Will you respond with humor, advice, or even challenge people?

Try:

- **Open-ended questions** – “What do you think about this?” or “How does this resonate with you?”
- **Reacting to comments** – Be funny, direct, or even sarcastic if it fits.
- **Active participation** – Post polls, quizzes, memes, or challenges to engage people.

It’s all about finding what makes people **interact** with your content.

---

## Step 5: Messaging Guidelines & Filter

Now that you’re starting to get a feel for things, you **need** to keep everything consistent. If you don’t have any guidelines, things will go off the rails fast.

**Build your voice guide (a mini cheat sheet for consistency):**

- **What do you always do?**
  - Are you super *formal*? Do you always use **humor** in responses? What’s your default tone?
- **What do you never do?**
  - Are there words or attitudes you won’t use? (E.g., nothing “too harsh” or “too professional”)
- **What about certain topics?**
  - What’s your **no-go zone**? If someone makes a rude comment, are you quick to put them in their place, or do you gently redirect?

Write this out and keep it visible—this will be your brand’s **voice bible**.

---

## Step 6: Continuous Testing + Feedback Loop

Now, you can’t just stop here. Your voice is a living, breathing thing. It needs constant testing, tweaking, and feedback. If you stop, it’ll get stale and boring. **No one wants that.**

**Questions to ask:**

- **What’s working?**
  - Look at engagement rates. What kinds of posts get the most comments, likes, shares, etc.?
- **What isn’t working?**
  - Are some responses falling flat? Is there a particular style that’s **not resonating**?

**Action Plan:**

- **Adjust your tone:** If something didn’t hit, change it up. Maybe you need to be a little more or less casual.
- **Refine your community interaction:** Maybe you need to engage a bit more or make your posts more **visually appealing**.

Repeat this testing phase every few weeks. You’ll never “settle” on one voice; it’ll evolve with your community.

---

**In Conclusion:**

- **Step 1:** Identify your **audience**.
  - **Step 2:** Define your **brand purpose and personality**.
  - **Step 3:** **Test** different tones.
  - **Step 4:** Establish your **engagement style**.
  - **Step 5:** Create a **messaging guide** for consistency.
  - **Step 6:** **Continuously test** and adjust based on feedback.
- 

## Framework for Attracting Mentor Personas with Your Brand & Community Voice

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### Step 1: Understand Mentor Needs & Desires (The Real Talk)

Mentors are **busy**. They’re usually established, sought-after, and possibly tired of answering the same dumb questions. You’re not just attracting anyone—you’re attracting **valuable, experienced mentors** who want to engage with a *community* that’s going places.

## Questions to Ask:

- **What do mentors want?**
  - They're after **meaningful conversations** and **growth opportunities**, not just "likes" and "thumbs up."
  - They want to engage with **purpose-driven individuals** and communities. If they see potential and ambition in your brand, you'll stand out.
- **What problems are you solving for them?**
  - Maybe they want to pass on their knowledge and skills to the next generation, but only if they see the **passion and initiative** in the people they engage with.
  - Are you providing them with **valuable content** that helps them stay at the top of their game? Are you offering **insightful discussions** that challenge their knowledge?

Focus on **empowerment, growth, and challenge**. This is what mentors thrive on.

---

## Step 2: Define Your Brand's Purpose as a Magnet for Mentors

Mentors will flock to brands that align with their **personal values** and **growth-oriented missions**. Don't just talk about how awesome you are—*prove it* with a laser-focused brand purpose that speaks to mentors' ambitions and professional goals.

### Key Considerations:

- **Mentor-Focused Purpose:** What is your community's **bigger mission** that resonates with **leaders and mentors**? Do you focus on **leadership development**, **life-changing advice**, or **personal growth**?
    - Example: "We help passionate professionals who want to become better leaders by connecting with people who have been there and done that."
  - **Mentor Alignment:** Are you in a space that **mentors respect**? Think: education, entrepreneurship, leadership, development. The more **relevant** your brand's mission is to the mentor's field of expertise, the more likely you'll attract their attention.
- 

## Step 3: Craft a Voice that Appeals to Mentors—Professional Yet Relatable

Mentors want to feel like they're engaging with a brand that **values** their time and wisdom. They want to be respected, **but they also want authenticity**. Your community's voice needs to balance professionalism with **relatability**.

### Voice Characteristics to Adopt:

- **Professional, but not stuffy:** Mentors don't want to feel like they're being lectured or talked down to. Keep it **authentic** and **respectful** but still **approachable**.
  - **Challenge and Inspire:** Don't just praise the mentor's advice—actively **ask for it** and **value their experience**. Engage them with **questions** that show you're open to learning and growing.
    - Example: "We're curious, @mentor\_name—how would you approach this challenge?" Or, "Your thoughts on this, @mentor\_name, are worth a million to us. What's your take?"
  - **Supportive:** Always support their contributions and frame the community as a **collaborative space**. Make them feel like a **key player**, not just a **resource**.
- 

## Step 4: Create Conversations that Attract Mentors

Mentors want to engage, but they don't want to waste time in **shallow interactions**. Your discussions need to be **high-caliber**, interesting, and **stimulating**—no fluff. Show them you're worth their time.

### What Should You Discuss?

- **Advanced Topics:** Mentors love to talk about what they've learned over the years. Craft conversations around **real-world challenges**, **strategies**, and **life lessons**.
    - Example: "What's the biggest lesson you've learned in your career that most people overlook?"
  - **Open-Ended Challenges:** Don't be afraid to **ask them to share wisdom**. Use **thought-provoking** questions that require deep reflection.
    - Example: "In your opinion, what's the best way to prepare for failure, and how can young professionals bounce back from it?"
  - **Ask for Mentorship:** Yes, straight-up ask for it, but with **respect**. Frame it as an opportunity for them to pass on their knowledge to people who value it.
    - Example: "We'd be honored if you could share your perspective on [topic]. What advice would you give someone starting out?"
- 

## Step 5: Content That Resonates with Mentors

Your **content** isn't just for engagement—it's a powerful tool to **attract** mentors. You need to create content that speaks to their **interests, values,** and **expertise**.

#### Content Ideas:

- **Mentor Spotlights:** Feature mentors in the community. Ask for their advice and insights. This **highlights** their expertise and gives them the chance to **showcase their value**.
    - Example: "We were lucky enough to chat with @mentor\_name about how they navigated the toughest challenges in their career. Here's their incredible advice."
  - **Thought Leadership Articles:** Post deep dives into areas where mentors can contribute their knowledge and experience. Ask them for their **opinion** on a trending issue.
    - Example: "We're discussing the future of leadership development. Here's where we think it's headed. What are your thoughts on this, @mentor\_name?"
  - **Q&A Sessions with Mentors:** Host Q&A sessions where mentors can answer the community's burning questions. This gives them **visibility** and positions them as a **trusted expert**.
- 

### Step 6: Make Engagement Effortless and Rewarding

Mentors are busy, so don't expect them to just pop in for a chat without a **reward**. If you want to keep them engaged, you need to create **systems** that respect their time while still offering value.

#### Ways to Engage:

- **Mentor-Exclusive Spaces:** Create a **special section** in your community where mentors can discuss ideas, share resources, or just network. Make this space a **valuable reward** for their time.
  - **Recognition:** Publicly recognize **mentors' contributions**. Give them **credits** for sharing their expertise, whether through shout-outs or featuring them in newsletters.
  - **Collaborative Content Creation:** Don't just ask them for advice—ask them to **collaborate** on content like blog posts, videos, or webinars. This lets them contribute at a higher level, and they'll feel more involved.
- 

### Step 7: Keep Iterating and Refining

Finally, mentors aren't going to stick around for the long term if they don't feel their contributions are valued. You've got to **refine** your approach continuously based on their feedback.

#### What to Track:

- **Engagement Levels:** Are mentors actively engaging in discussions? Are they contributing ideas, or do they just pop in and leave?
  - **Content Performance:** Are the posts where you tag mentors getting more attention? Do their responses lead to deeper discussions in the community?
  - **Feedback:** Ask mentors for feedback. Be open to their suggestions for how the community can improve.
- 

#### In Conclusion:

To attract **mentor personas**, you need to:

1. **Understand their motivations** (value growth, meaningful interactions, leadership).
2. Create a **professional yet approachable voice**.
3. Foster **high-level discussions** that challenge and inspire.
4. Produce **content** that resonates with their expertise and allows them to shine.
5. **Respect their time** by offering meaningful recognition and opportunities for engagement.

**Bonus Tip:** Make sure you're consistent! Mentors are busy and will bounce if they don't see **continuous** high-quality interactions. Keep the quality up, and they'll come back for more.

Now, go get yourself a mentor, and stop wasting my time. ☺

---

### 1. Value Growth

Mentors want to feel like they're **growing** personally and **professionally**. It's not just about *passing on knowledge*—it's about **being part of something bigger**, something that challenges them and makes them rethink their own strategies.

#### Why Does This Matter?

- **Growth = Relevance:** Mentors want to stay relevant. They're constantly looking for new ways to improve their skills, perspectives, and understanding of their industry.
- **Legacy and Impact:** They want to leave a **lasting legacy**, which is why they seek **value growth**—not just in themselves but in the people they mentor too. Helping others grow reflects back on their ability to grow.

### How to Tap Into This?

- **Provide Learning Opportunities:** Create spaces in your community where mentors can also be **challenged**. Give them **advanced discussions** or **new perspectives** they might not have thought about. This way, they get to engage in their own **growth** while helping others grow.
  - **Content That Pushes Boundaries:** Share thought-provoking content that challenges their current thinking. For example, ask them to tackle "What's the one thing that's changed your perspective in the last year?" or "What's the most underrated trait of effective leadership?"
- 

## 2. Meaningful Interactions

Mentors don't want to be **background noise** or just **answers on demand**. They want **authentic conversations** with people who value them—not just **followers**, but people who are genuinely interested in **what they have to offer**.

### Why Does This Matter?

- **Impact Over Quantity:** A mentor wants fewer but **higher quality** interactions that feel **purposeful**. They want to see the fruits of their labor in the form of **real growth**, not just surface-level exchanges.
- **Recognition:** They want to know they're making a **difference**. Meaningful interactions show them that their time and advice are being **valued and used**.

### How to Tap Into This?

- **Ask Deep Questions:** Engage them with questions that require thoughtful, reflective answers. Don't settle for "What's your advice for this?" Instead, go for "What's the toughest challenge you faced early in your career, and how did you overcome it?"
  - **Real Conversations, Not Just Soundbites:** Instead of treating mentors like **answer machines**, engage them in **conversations** that reflect the **depth** of their experience. Get into a back-and-forth dialogue where you can learn from them **and** they can learn from others.
- 

## 3. Leadership

Mentors are, by nature, **leaders**. They've got the experience, they've earned the trust, and they've faced their own challenges. Their role isn't just to give advice, but to **inspire, empower, and guide** others toward becoming **better leaders** themselves.

### Why Does This Matter?

- **The Power of Influence:** They're not just teaching—they're shaping the future. They want to **empower others** to lead in their own right, ensuring that the next generation has the tools and **skills** to take the torch.
- **Self-Reflection and Accountability:** By mentoring, they're **reinforcing their own leadership**. They're constantly learning what makes others tick, which challenges their own views and hones their leadership.

### How to Tap Into This?

- **Encourage Leadership Development:** Your community should emphasize **leadership skills**. Create content or spaces for discussions around **leadership and team-building**, and ask your mentors to lead those conversations.
  - **Mentorship as a Two-Way Street:** Allow mentors to feel like they're **developing** as much as the people they mentor. Show them how their leadership **grows** as they teach others. When they feel like they're **improving** as leaders, they're more likely to stay engaged and invest their time.
- 

### In Summary, Here's What You Need to Know:

1. **Value Growth:** Mentors are looking for **personal and professional growth**—they want to feel like they're **constantly evolving** and their time is spent on people who are serious about growth.
  2. **Meaningful Interactions:** They crave **authentic, high-quality interactions**. It's not about quantity—it's about leaving a **lasting impact** on people who appreciate their guidance.
  3. **Leadership:** Mentors are **natural leaders**, and they want to be **empowered** and respected. They're interested in **inspiring** others to be leaders as well.
- 

### ☐ Key Voice Tweaks to Apply Throughout

#### 1. Professional

- Clear, concise language with structured headers and bullet points.

- Use active voice and action-oriented phrasing.
- Tone is confident but not overhyped.

## 2. Approachable

- Keep the fun elements (like emojis and playful headers), but balance them with clarity and purpose.
- Soften aggressive humor—keep it quirky and upbeat instead of snarky or chaotic.
- Use friendly, inclusive language like “you’ll find,” “we recommend,” “feel free to.”

---

### ☐ Example Refinement

#### Original:

Why? Because it locks in behavior, habit, and checklist dopamine fast. That onboarding flow needs to run like it’s on rails with glitter and threats.

#### Refined:

Why? Because it builds momentum, habits, and early wins. Think of it as an onboarding flow on rails—with a little sparkle and a lot of structure.

---

#### Original:

Ensure checklist progress: 50% completion target  
Add to "Who's New" Coda view or Slack thread  
Assign light engagement challenge: post or comment in #random or #your-journey

#### Refined:

- Target 50% checklist completion within the first 72 hours
  - Highlight the member in the “Who’s New” section on Coda or Slack
  - Invite them to join a light engagement challenge (e.g. post in #random or #your-journey)
- 

If you’d like, I can go through the whole document and rewrite the tone consistently to hit this balance of pro + approachable. Want me to start with a specific section or the whole thing? ☺

---

## ☐ ☐ Level-Up Discussions: Thought Leader Sparks

For the bold brains who joined to *build* something — not just vibe in the corner.

### ☐ Goals:

- Surface ambitious ideas early
- Create space for constructive friction
- Empower new members to contribute meaningfully, fast

### ☐ Implementation Plan:

#### 1. Weekly Power Prompt (Slack Thread or Coda Embed)

Drop a high-voltage question like:

- “What’s one sacred PM ritual you think is actually BS — and why?”
- “If you had unlimited budget and zero stakeholders, what community experiment would you launch tomorrow?”
- “What’s one ‘unpopular truth’ about leadership that you’ve learned the hard way?”

#### 2. Curated Micro-Forums (Opt-In)

Auto-tag newcomers by interest (via onboarding form or intro post) and invite them to:

- **Mini-Think Tanks** (small group DM or private thread): Rotate topics weekly
- **Lightning Rants Sessions** (15-min calls): Everyone gets 3 minutes to provoke the room

#### 3. High-Stakes Hot Seat

After week 1, invite standout members to:

- Present a controversial opinion or idea
- Get rapid-fire feedback (with emoji-only reactions, live thread)

#### 4. Badge Incentives: “Contrarian Catalyst” / “Deep Diver” / “Idea Grenadier”

Award badges for:

- Challenging a popular opinion (respectfully)
- Sparking a 20+ comment thread
- Offering a solution nobody saw coming

#### 5. “Mentor vs Mentee Debate Nights” (Quarterly)

Have newbies and mentors go head-to-head on spicy topics.

Example debate: “*Agile is just waterfall in disguise with a fancier hat.*”

---

Wanna add this to the doc? Want me to rewrite it in your tone, sprinkle more glitter, or turn it into a systemized block like the others? Or are you scared the discussion's gonna be too advanced for your soft lil brain to handle, hmm? ☹

#### ☐ ADD: “Shine Zone” Section (New Members’ Brag Board)

##### ☐ Why?

Turn the spotlight on them early. Recognition creates retention. It also filters high-signal talent straight into the core community radar.

##### ☐ Section Title: “Brag Bites: Show Off Your Spark”

Add to Stage 3 or Bonus section.

##### Instructions for new members:

"Drop 1 screenshot, link, or voice memo that shows off something you're proud of—big or small. Did you run a killer retro? Build an internal tool? Invent a Slack emoji taxonomy? THIS IS YOUR MOMENT."

Then add a running thread or Coda view with:

- ☐ Name
- ☐ Brag Bite
- ☐ Peer Shoutouts
- ☐ Tag: Skill or Theme (“Product Ops,” “Meeting Magic,” “Unicorn PM”)

---

#### ☐ ADJUST: Feedback Form Prompts to Let Them Flex

**Current Goal:** Get 1 qualitative feedback point per new member.

**Update the form to include “Let Us Brag About You” prompts:**

- “What’s something weirdly specific you’re amazing at?”
- “What should people come to you for?”
- “What’s one challenge you’ve crushed that others might struggle with?”

Then you can:

- Surface this in onboarding highlights
- Auto-mention them in relevant future convos (via Slack bots or Coda triggers)

---

#### ☐ INSERT: “Mentor Spotlight Moments” in Slack

Encourage mentors to post short “Mentor Spotlights” where they praise something *specific* about their mentee publicly after 72h.

Example format:

☐ **Mentor Spotlight:** [@Name] This week’s dopamine injection: [Thing they did]. ☐ You better keep an eye on this one. ☐ ts.

---

#### ☐ Силни страни (и не, не говорим за трицепсите ти от copy-pasting)

##### 1. Ясен, структуриран, визуално приятен формат.

Сериозно, ако това беше конкурс за най-много bullet points, щеше да вземеш злато и да си направиш трофей с Notion лого.

##### 2. Глас и тон:



Браво, Nerdzilla. Имаш one consistent voice — хем забавен, хем целенасочен. Пак си въведа тази полу-саркастична, meme-friendly стилистика, която действа като антидот на скучните onboarding гайдове.

### 3. Епичен use на gamification:

Level Up системата в Trello, XP статистики, мини-челинджи... буквално се усеща като onboarding RPG. Готино, ако не броим факта, че хората ще се чувстват виновни, ако не направят интро поста си като haiku в рима.

---

## ☐ Облаци на хоризонта (а.к.а. къде започва срама):

### 1. Прекалено дълго за реалния attention span на новите.

Говорим си за хора, които имат 13 отворени таба и Slack ping-ове на всеки 6 секунди. Това не е „Onboarding Kit“, това е **Community Bible 3.0**.

☐ Suggestion: Раздели го на bite-sized versions — „Starter Pack“, „Next Level“, „Mentor Guide“, etc.

### 2. Къде е "Why Should I Care"?

Сякаш липсва мотивационен луп — какво ще спечели потребителят, ако изкара onboarding-а като champion?

☐ Suggestion: Добави секция „What's in it for you?“ – хората искат слава, връзки, и... Slack emoji реакции. Направи го ясно.

### 3. Вътрешният Markdown meeting brief... сух.

Между меметата и Icebreaker Roulette, това звучи като Notion документ, който някой е кръстил „Final-Final-2-LAST-update-v7.md“.

☐ Suggestion: Или го вкарай в същия tone-of-voice (с леки roast-ове и flair), или го изнеси в отделен boring-but-useful internal doc.

---

## ☐ UX Nerd Feedback (за Queen Miss Brainiac™):

- Имаш 234783 идеи, но трябва малко **flow control** – къде започва човек, къде свършва, и какво следва нататък?
- Някои секции могат да са collapsible или под формата на tabs / toggles, ако го качиш в Coda/Notion.
- Trello + Slack + Coda = ☐  Context switching hell.

Може ли да има one-pager или Command Center, който агрегира важните действия?

---

## За финал – Roast Section™:

- “Welcome Brain Dump”? Това име звучи като community onboarding след хранително натравяне.
- „Gamified flow с glitter and threats“? Явно ти е останал PTSD от корпоративен onboarding с PowerPoint от 2009.
- „Find your PM twin!“ – чудесна идея, ако искаш хората да rage quit още първата седмица, щото нямат съвпадение.
- “Share a haiku”? Бе, ти хора ли онбордваш или ги караш да кандидатстват в Hogwarts?

---

## ☐ Toolkits & Resources

### ☐ Mentor Resource Pack

- 1-pager: how to support new members in their first 2 weeks
- Sample prompts to use if mentee is quiet or ghosting
- Quick FAQ: where to find stuff, how to explain onboarding

### ☐ Member Starter Pack

- Slack etiquette cheatsheet
- Coda how-to guide (with gifs)
- Top 3 threads to read & react to
- Calendar sync button
- “Who to follow” recs for community leaders

### ☐ Community Team Ops Manual (internal)

- Roles & response time expectations
  - How to escalate tech or access issues
  - Feedback loop protocol
  - Weekly check-in ritual prompts
- 

## ☐ **Outro: What Success *Feels* Like**

If we do this right...

- People show up feeling like they belong within *days*, not weeks.
- Newbies say, “*Wait... this feels like my kind of weird.*”
- Mentors feel proud they made a real dent.
- Team stops spending hours chasing people—energy goes into leveling them up.
- The community builds momentum instead of bottlenecks.

And you? You get to brag that your onboarding doesn’t suck. ☺

**Let’s make ‘joining’ feel like ‘arriving.’**

#MicDrop ☐

---

Let me know if you want a stripped-down Notion version or a printable PDF too ☺

## ☐ **Still Needed to Finish This Beast:**

### 1. ☐ **Retention & Re-Engagement Templates**

- Pre-built DMs or email nudges for Week 3+ (“Where ya at?” check-ins)
- Templates for inactive members (“We miss you + quick survey link”)

### 2. ☐ **Mentor Toolkit**

- Mini Guide: “How to be a decent mentor without losing your soul”
- List of DM prompts for mentor follow-ups
- How to spot a ghost (and when to reassign mentees)

### 3. ☐ **Persona-Based Onboarding Variants**

- Different tracks/templates for: async lurkers, loud joiners, event chasers
- Slight tweaks to checklist flows or welcome copy based on user type

Oh, look! Personalization? Never thought you’d get that fancy... how are we still alive from the shock?

### 4. ☐ **Feedback Loop System**

- Where do feedback form responses go? Who reads them? When do we act on them?
- Visual dashboard in Coda or Notion for quick skim of top pain points

### 5. ☐ **Event-Driven Onboarding Tactics**

- How to align onboarding around major launches or events (event-first flow!)
- Urgency template: “You joined *just* in time for X...”

### 6. ☐ **Progression / Rewards System**

- Define Levels (Level 1 = onboarded, Level 2 = contributed, etc.)
  - Badges, role updates, or feature privileges
  - Can your Trello zap actually crown them “Meme Wizard”? Yes? Good.
- 

☐ **Персонализиране на Community Onboarding Master Kit (а.к.а. да не е за работи без душа)**

## 1. Tone Customization: "Personality Sync Injection™"

Добави раздел за избор на стил/тон, който новодошлите могат да изберат – примерно:

### Choose your onboarding flavor:

- ☐ *Wholesome & Chill* – gentle nudges, no pressure, warm vibes
- ☐ *Spicy & Bold* – sass, humor, roast-style love
- ☐ *Nerd Mode* – deep dives, frameworks, & productivity hype
- ☐ *Gamified Chaos* – unlock XP, complete dares, chase dopamine

### ☐ Приложи:

- Промени съдържанието на DM, бота, и първото интро според стила.
  - Бонус: може дори глас или емоджи тема в Slack да върви с избора (чист mindfuck за скуката).
- 

## 2. Custom Icebreaker Generator v2.0™

Всеки onboarding стил получава свои уникални prompts:

- **Spicy & Bold:**  
“Какъв е твоят cringe productivity flex?”  
“Нещо, което мразиш, но правиш, щото си 'отговорен възрастен'.”
  - **Wholesome & Chill:**  
“Какъв vibe искаш от тази общност?”  
“Последното нещо, което те накара да се усмихнеш?”
  - **Nerd Mode:**  
“Любим productivity tool и защо е по-добър от всички останали?”  
“Ако имаше API за приятелство, какво би включвал?”
- 

## 3. Mentor-Matching по стил

Това да пратиш луд extrovert с introvert, дето иска просто да lurk-не тихичко? *Тотален fail.*

### Какво правиш:

- Лек стилев тест в onboarding формата → tag в Trello → assign mentor със сходен стил.
  - Името на ментора също може да е в тона:
    - ☐ Chief Sass Officer
    - ☐ Calm Buddy
    - ☐ Fellow Framework Goblin
- 

## 4. Intro Templates по персона

Добави pre-filled пост шаблони според vibe:

### For Spicy People™:

“I’m [Name], I joined for the chaos, stayed for the memes. My red flag? I ship sprints without QA. AMA.”

### For Nerds:

“Hey, I’m [Name], current obsession: building Zettelkasten in Notion. I’m here to find my thinking tribe.”

### For Chill Beans:

“Hi everyone ☐ Just happy to be here. Hoping to learn, vibe, and grow together ☐”

---

## 5. DM Automations w/ Mood Matching

- Автоматизираните съобщения да не звучат като писани от бот с лоботомия.
  - Пример за Spicy Welcome DM:  
“Yo [Name]! We saw your form and instantly knew you’re a menace (in a good way). Your XP bar starts *now*. First quest: roast yourself in #your-journey. Need help? Your mentor [MentorName] is equally unhinged.”
-

## 6. Leaderboard by Personality Zone

- Не просто leaderboard – *кастъмизиран*.
    - Spicy folks → “Chaos MVPs”
    - Chill folks → “Vibe Keepers”
    - Nerds → “Big Brain Club”
- 

### ☐ Wanna Go Too Far? (Ofc you do.)

- Анимирани Slack реакции според персоналността
  - Persona-based badges:
    - “Lurker Supreme”
    - “Notion Priestess”
    - “Chaos Consultant”
    - “Emoji Abuser”
  - Мемефикация на системата: всеки intro пост unlock-ва мем с “какво те очаква” стил
- 

### ☐ Ultimate XP Tracking Loop™ (Trello x Slack x Coda Integration Layer)

#### ☐ Weekly XP Cycle (Coda-Driven)

##### XP Inputs (Log to Coda automatically):

- ☐ Slack Activity:
  - +10 XP: Intro post
  - +5 XP: React to a thread
  - +15 XP: Comment in #random or #your-journey
- ☐ Mentorship:
  - +20 XP: DM mentor + screenshot (auto-track via upload form)
  - +30 XP: Respond to mentor DM
- ☐ Feedback & Forms:
  - +25 XP: Submit first feedback form
  - +5 XP: Submit suggestion/idea
- ☐ Event Participation:
  - +15 XP: RSVP
  - +25 XP: Attend + comment in thread

##### Weekly Bonuses:

- +50 XP: 72h Checklist fully complete
  - +20 XP: 3+ thread engagements in one week
  - +10 XP: Posted a meme or something funny
- 

### ☐ Gamified Labels in Trello (Auto-Update via Coda Stats)

Label Name	XP Threshold	Slack Bot Behavior
<input type="checkbox"/> "Newbie Hatchling"	0–50 XP	Welcome ping + “Try your 72h Missions!”
<input type="checkbox"/> "Level 2 Initiate"	51–120 XP	Bot sends “you leveled up!” gif + next challenge card
<input type="checkbox"/> "Momentum Mage"	121–200 XP	Add to shoutout queue; unlock Icebreaker Pro prompt
<input type="checkbox"/> "Core Cult Member™"	201+ XP	Personalized DM + invite to be a Mentor-in-Training

---

### ☐ Slack Automation (via Zapier / Workflow Builder)

- **Every Sunday:**

- Bot posts XP leaderboard in #general
- Top 3 get emojis next to names, e.g. 🏆🏆🏆
- “XP Gainers of the Week” shoutout

- **Every Level Up:**

- Auto-DM with reward (e.g. exclusive resource, meme badge, or mini challenge)
- Public celebration option → one-click “Flex in #wins” button

---

- **Coda Dashboard Views (Auto-Update)**

- **Member XP Profile View:**

- Name | XP | Level | Last Activity | Slack Handle

- **Mentor Tracker:**

- Mentee XP growth over time
    - Mentor Engagement (response rate, DM activity)

- **Engagement Heatmap:**

- XP by Week / by Slack Channel / by Action Type

---

- **Habit Reinforcement Design (a.k.a. Nerd Bait)**

- □ **Variable Rewards:** Mystery XP drops (10–30) for surprise actions like reacting to a new post or sharing a meme.
  - □ **Micro-Challenges:** Random popup card each week (e.g. “Drop your current workflow in a haiku = 20 XP”)
  - □ **XP Streak System:** Daily micro-win actions (e.g. “log in + react = 5 XP”) tracked for streak rewards at 3, 5, 7 days.
  - □ **Public Visibility:** Add “XP Stats” embed in the #starter-pack Slack thread + pin top gainers in Trello leaderboard

---

- **Meeting Tracking Template**

**Meeting Title:**

**Date & Time:**

**Facilitator:**

**Attendees:**

**Location/Platform:**

- **Agenda**

- 1. Welcome & Objectives**

- Brief overview of meeting goals.

- 2. Community Culture Updates**

- New member introductions.
  - Notable interactions on Slack, LinkedIn, Coda.
  - Upcoming events or initiatives.

- 3. Engagement Experiments**

- Review of recent experiments and outcomes.
  - Discussion of new ideas for engagement.

- 4. Feedback Collection**

- Summary of recent feedback received.
  - Plans for addressing feedback.

- 5. Learning Experience Enhancements**

- Updates on Coda hub improvements.
  - Discussion on resource clarity and accessibility.

- 6. Community Voice**

- Identification of blockers or unmet needs.
  - Suggestions for new initiatives.

## 7. Action Items & Next Steps

- Assignments and deadlines.

### ☐ Action Items

Task Owner Due Date Status

---

### ☐ SMART Goals & KPIs

#### 1. Build & Maintain Community Culture

- *SMART Goal:* Increase member engagement by 20% over the next quarter.
- *KPI:* Number of active participants per week.

#### 2. Drive Engagement through Experiments

- *SMART Goal:* Implement 3 new engagement strategies monthly.
- *KPI:* Participation rates in new initiatives.

#### 3. Collect & Translate Feedback

- *SMART Goal:* Conduct bi-weekly feedback sessions.
- *KPI:* Number of actionable insights gathered.

#### 4. Shape the Learning Experience

- *SMART Goal:* Update 100% of learning resources by end of Q2.
- *KPI:* User satisfaction scores on resource usefulness.

#### 5. Be the Voice of the Community

- *SMART Goal:* Identify and address 5 major community concerns quarterly.
  - *KPI:* Resolution rate of reported issues.
- 

### ☐ Discussion Prompts

- Which community segments are most engaged, and why?
  - What feedback trends are emerging?
  - Are there any barriers to participation we need to address?
  - How can we enhance the learning resources for better accessibility?
- 

For additional resources, you might find these templates helpful:

- [Smartsheet Project Management Meeting Agenda Templates](#)
- [ClickUp Meeting Tracker Template](#)
- [Lark Meeting Tracker Template](#)

Would you like assistance in customizing these templates further or integrating them into your preferred platforms like Google Workspace, Trello, or Discord?

# Community Engagement Specialist Roadmap: From Setup to Success

Let me break down a practical roadmap for implementing your community engagement strategy with all the PM rigor it deserves. This isn't just about creating documents—it's about building systems that drive real results.

## Phase 1: Foundation & Benchmarking (Weeks 1-2)

### Key Deliverables:

- Establish baseline metrics across all 5 responsibility areas
- Set up integrated dashboard connecting Trello + Google Sheets
- Develop community health scoring system

### Implementation Steps:

1. **Audit current engagement levels** across all platforms (capture your "starting point")
2. **Research industry benchmarks** for similar communities at your stage
3. **Build your measurement infrastructure:**
  - Create master Google Sheet with conditional formatting for at-a-glance health monitoring
  - Set up Trello integration using Zapier or native power-ups to feed data automatically
  - Implement tagging system for categorizing community interactions

**Pro Tip:** Don't get lost in vanity metrics. For a mentorship community, depth of engagement (quality of interactions) often matters more than pure volume (number of posts).

## Phase 2: Experiment Framework Development (Weeks 3-4)

### Key Deliverables:

- Create engagement experiment template with clear hypothesis structure
- Build feedback collection system across touchpoints
- Establish experiment review cadence

### Implementation Steps:

1. **Design your experiment blueprint** (problem → hypothesis → test → measure → iterate)
2. **Set up lightweight feedback channels:**
  - Quick-pulse emoji reactions
  - Micro-surveys (1-3 questions max)
  - Conversation starter prompts for qualitative insights
3. **Create your first experiment backlog** (start with 3-5 ideas maximum)

**Pro Tip:** Small tests yield faster insights. Instead of overhauling your entire approach, isolate variables: test a new welcome sequence while keeping everything else constant.

## Phase 3: KPI Activation & Optimization (Weeks 5-8)

### Key Deliverables:

- Finalized SMART KPIs with leadership buy-in
- Integration of metrics into weekly/monthly reporting cycles
- First optimization actions based on early data

### Implementation Steps:

1. **For Community Culture:**
  - Define specific "active participation" thresholds by member segment
  - Establish NPS or sentiment tracking methodology
  - Set up cohort analysis to track retention patterns
2. **For Engagement Experiments:**
  - Implement A/B testing framework for new initiatives
  - Create participation lift calculation methodology
  - Establish minimum viable sample sizes for conclusive results
3. **For Feedback Collection:**
  - Build insight categorization system
  - Establish feedback-to-action pipeline with SLAs
  - Develop closed-loop reporting for participants who provide feedback
4. **For Learning Experience:**
  - Implement resource utilization tracking
  - Create learning path completion metrics
  - Establish knowledge application success indicators
5. **For Community Advocacy:**
  - Set up issue tracking with resolution timeframes
  - Create initiative adoption measurement framework
  - Develop leadership action tracking system

**Pro Tip:** Use the 80/20 rule for your metrics. Identify the 20% of metrics that drive 80% of your community success, and prioritize those for deep analysis.

## Phase 4: Automation & Scaling (Weeks 9-12)

### Key Deliverables:

- Automated reporting workflows
- Playbooks for repeatable community processes
- Self-serve analytics dashboard

### Implementation Steps:

1. **Set up automatic data population** in Google Sheets (via forms, Zapier, or APIs)
2. **Create Trello automation rules** for community management tasks:
  - Card creation for new member welcomes
  - Automated movement through experiment pipelines
  - Deadline reminders for engagement touchpoints
3. **Build reusable templates** for recurring community activities

**Pro Tip:** Document everything as you go. Your future self (and potential team members) will thank you for creating clear standard operating procedures.

## Dashboard Integration: The Command Center

Your dashboard should unite all these elements into a single source of truth. Here's a practical structure:

### 1. Top-level scorecard:

- Overall health score (composite of key metrics)
- Trend indicators (up/down from previous period)
- Alert indicators for metrics falling below thresholds

### 2. Drill-down views:

- Member segment performance
- Platform-specific engagement
- Experiment status tracking
- Feedback theme analysis

### 3. Action center:

- Prioritized intervention opportunities
- Resource allocation recommendations
- Quick-win identification

Would you like me to elaborate on any particular phase or component of this roadmap? Or would you prefer I create a specific template for one of these deliverables to help you get started immediately?

## Community Engagement Workflow Automations

This document provides concrete instructions for setting up powerful automations to streamline your community management workflows using Trello, Google Workspace, and Discord.

## Google Sheets Dashboard Automations

### 1. Automatic Data Import from Trello

#### Setup Instructions:

#### 1. Install the Trello Add-on for Google Sheets:

- In your Community Dashboard Sheet, go to Extensions > Add-ons > Get add-ons
- Search for "Trello" and install the official add-on

#### 2. Create an import configuration:

```
=IMPORTTRELLOCARD("Board ID", "List Name", "Optional Card Filter")
```

#### 3. Set up recurring imports for key metrics:

- In your sheet, go to Extensions > Trello > Schedule Refresh
- Set daily imports of active cards from your experiment boards
- Set weekly imports of completed cards for reporting

### 2. Conditional Formatting for Metric Monitoring

#### Setup Instructions:

#### 1. Set up health indicators in your Executive Summary tab:

- Select your KPI cells
- Choose Format > Conditional Formatting
- Create rules for:
  - Green (>=100% of target): Background #b7e1cd
  - Yellow (80-99% of target): Background #fce8b2
  - Red (<80% of target): Background #f4c7c3

#### 2. Create trend indicators:

- Select % change columns
- Set conditional formatting:
  - Positive change: ▲ in green (#0f9d58)
  - Negative change: ▼ in red (#db4437)
  - No change: ◆ in gray (#7e7e7e)

### 3. Automated Weekly Report Generation

#### Setup Instructions:



1. Create a report template in Google Docs

2. Set up Apps Script automation:

- In your Google Sheet, go to Extensions > Apps Script
- Create a new script named "weeklyReportGenerator"
- Paste this code:

```
function generateWeeklyReport() {
 // Get the template
 var templateDoc = DocumentApp.openById('YOUR_TEMPLATE_DOC_ID');

 // Create a new doc for this week's report
 var newDoc = DocumentApp.create('PM Mentality Weekly Report - ' + new Date().toLocaleDateString());

 // Copy template content to new doc
 var body = newDoc.getBody();
 body.appendParagraph(templateDoc.getBody().getText());

 // Get data from the dashboard
 var sheet = SpreadsheetApp.getActiveSpreadsheet().getSheetByName('Executive Summary');
 var data = sheet.getRange('A1:F10').getValues();

 // Replace placeholders with actual data
 // [Implementation details would follow...]

 // Email the report to team
 var emailTo = "team@example.com";
 var subject = "Weekly PM Mentality Community Report";
 var emailBody = "This week's community report is attached.";
 var pdfReport = newDoc.getAs('application/pdf');

 GmailApp.sendEmail(emailTo, subject, emailBody, {
 attachments: [pdfReport]
 });
}
```

3. Set a time-based trigger:

- In Apps Script, click Triggers > Add Trigger
- Choose weekly execution on Friday afternoons

## Trello Workflow Automations

### 1. New Member Onboarding Automation

#### Setup Instructions:

1. In your Member Journey Trello board, click "Automation" > "Create Button"

2. Create a "New Cohort" button:

- Name: "Create New Member Cohort"
- Icon: 

3. Set the button actions:

- Create a card in "New Member Cohort" list
- Add a standardized checklist:
  - Send welcome messages
  - Create introduction thread
  - Schedule group orientation
  - First-week check-in
  - Add to resource access group

4. Set up a "When card is created in New Member Cohort" trigger:

- Automatically assign to Community Engagement Specialist
- Set due date for 1 week from creation
- Add yellow "Onboarding" label

### 2. Experiment Pipeline Automation

#### Setup Instructions:

1. Create status change rules:

- When card moves to "Currently Running":
  - Add "Start Date" to custom field with current date
  - Add standard "Monitoring" checklist
  - Send notification to team channel

2. Create measurement reminder:

- When card has been in "Currently Running" for 7 days:
  - Add comment "Time for mid-experiment check-in"
  - Add yellow "Review Needed" label

- Notify card owner

### 3. Create results documentation workflow:

- When card moves to "Analysis Phase":
  - Add "Results Documentation" checklist:
    - Record final metrics
    - Document key findings
    - Identify next steps
    - Update experiment log in Google Sheet

### 4. Integration with dashboard:

- When "Results" custom field is updated:
  - Run Zapier workflow to update Google Sheet
  - Create card in "This Week's Focus" on Community Management board to implement findings

## 3. Feedback Collection Automation

### Setup Instructions:

#### 1. Create recurring feedback cards:

- Use Butler command:

```
every Monday at 9:00 AM create card "Weekly Feedback Review" in list "Feedback Collection" with description "Gather feedback from mentees and team members"
```

#### 2. Set up issue escalation workflows:

- When label "Critical Issue" is added to a card:
  - Move to top of "Blockers & Concerns" list
  - Add all board members as watchers
  - Send notification to leadership channel
  - Create calendar event for review within 24 hours

#### 3. Configure feedback closure tracking:

- When a card moves to "Insights & Actions":

## ☐ ENGAGEMENT SUPPORT PLAN (Slack Threads: 3+ Per Week)

### ☐ Weekly Goals

- 3 meaningful replies to mentee threads
- 1 initiated thread or check-in prompt
- 1 personalized DM follow-up based on a thread
- 1 piece of feedback collected (reaction, quote, or direct DM)

☐ Bonus if you start a friendly roast war or quote someone in a way that makes them feel like the main character of the week

### ☐ Engagement Tracker Template (Google Sheet / Coda / Notion)

Week	Thread Link	Type (Reply/Prompt)	Who You Engaged	Topic	Response Quality (1-5)	Feedback Noted	Follow-up Planned
W1	[Slack link]	Reply	@Elena	Burnout hacks	4	"Loved your take on pacing, thanks!"	DM to ask about blog
W1	[Slack link]	Prompt	Whole channel	"Toxic PM trait?"	5	Got 6 LOL reacts + 2 replies	Share best in #intros
...	...	...	...	...	...	...	...

Use emojis as engagement radar. If your post is crickets, you're being basic. Try again.

### ☐ Message Templates (Slack + Discord)

#### ➤ Supportive Mentor-Style Thread Reply:

"Oof, that's a classic sprint spiral ☐. Been there. Curious—do you have a go-to ritual to reset when stuff gets chaotic? Asking for a 'friend' ☐"

#### ➤ Sassy Check-in Prompt:

"Alright, thread lurkers. You've been watching in silence like it's reality TV. Time to drop your red flags as a PM. GO. ☐"

#### ➤ Curiosity-Driven Feedback Bait:

“Quick pulse check ☐

What's been the weirdest thing you've *actually* enjoyed about onboarding so far? (Mine is stalking everyone's workflows)”

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## ☐ BEST ENGAGERS TO STUDY + STEAL FROM

### For Slack:

1. **@Stefano** – Obsessed with metaphors, makes even checklist updates sound like Shakespeare.
2. **@Tia** – Serial tagger + hype queen. Drops fire emojis like they're strategy.
3. **@Jules** – Asks *weirdly specific* questions that pull quiet folks out of hiding.

### For Discord:

1. **@OtakuPM** – Reacts to *everything*, even when it doesn't warrant it. King of “???” and side-eye emojis.
2. **@ModMilly** – Drops memes with perfect timing. Her engagement ratio is unmatched.
3. **@NoiseEngineer** – Builds lore around members like “The Notion Witch” or “Sprint Goblin.”

### For LinkedIn:

1. **Rosie Sherry** – Community queen. Always replies like it's tea time.
  2. **Erica Kuhl** – Shares real wins + asks subtle vulnerable questions.
  3. **David Spinks** – Posts feel like open-ended brain pokes. People can't help but comment.
- 

## ☐ Touch ‘Em in the Soul (Without Being Creepy™)

Use this **3-Part “Touch-Point” Framework** in responses:

1. **Relate (shared struggle)**: “Ah, I've rage-quit retros over less.”
  2. **Reveal (mini story)**: “Last time I led a project like that, I accidentally caused a two-week Jira crisis.”
  3. **Re-engage (ask)**: “Curious how you framed that convo with your team?”
- 

Wanna go next level? ☐

Let me build you a **custom Slack thread responder cheat sheet** with power openers, feedback bait lines, and emoji-as-signal decoding.  
Or I can rig your **Discord bot** to serve random “engagement dares” like “Post a voice note of you reading your last sprint review in a dramatic tone.”

Just say the word. Or blink. Or type like the chaotic overachiever you are.

Ready to throw this into your Coda tracker or want me to inject this right into the doc, Big Brain?

## ☐ Community Onboarding Master Kit

For: PM Mentality | Role: Community Engagement Specialist (PM Mentality Brainiac Edition™)

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### ☐ Onboarding Goals (SMART AF)

- Ensure **90% onboarding checklist completion** within 72 hours of joining.
  - Achieve **75% first-week activity rate** (Slack post, poll, event RSVP, etc).
  - Generate **1 qualitative feedback point per new member** in the first week.
  - Attain **100% Slack + Coda access** within 24h of invite.
- 

### ☐ Onboarding Journey Map

#### ☐ Stage 1: Pre-Onboarding Prep

- Send Slack invite + Coda access within 1 hour of acceptance
- Assign mentor from shared mentor pool (Trello automation)
- Pre-fill checklist & add member to tracking dashboard
- Auto-schedule welcome email (includes Slack norms, intro post prompt, and checklist link)

#### ☐ Stage 2: First 72 Hours

- Auto-Welcome Bot tags new member + assigns mentor
- Personalized DM from Community Team within 24h
- Checklist Reminder Bot pings at 48h of silence
- Encourage intro post with “3-Layer Cake” or Icebreaker Roulette prompt
- Trigger small win: react in Slack, RSVP to event, or submit feedback form
- Ensure checklist progress: 50% completion target
- Add to "Who's New" Coda view or Slack thread

- Assign light engagement challenge: post or comment in #random or #your-journey
- Begin mentor follow-up loop (DM prompt sent via Slack bot)

### ☐ Stage 3: Week 1 Milestones

- Slack engagement: 1+ post or comment
- Mentorship ping: 1:1 DM or comment exchange
- Feedback form submitted (voice-of-community system)
- Mentorship match confirmed & intro complete
- Member added to “Starter Pack” thread / resource hub

### ☐ Stage 4: Week 2+ Integration

- Invite to join 1 working circle or project-based thread
- Add member to the Seasonal Digest or showcase board
- Feature 1 spotlight post in Slack (#your-journey or #general)
- Share relevant event or opportunity link (personalized DM)
- Track participation in first async or live session (tag on Notion/Coda)

### ☐ Stage 5: Retention Loop (Week 3+)

- Send “What’s next?” DM nudge with XP goal or spotlight option
- Invite to become a buddy/mentor-in-training
- Add to contributor thread (ideas, shoutouts, guest-hosting)
- NPS survey or 3-min feedback round
- Tag as "active core" if 3+ weeks of participation & initiate reward or badge

## ☐ Internal Sync: Meeting Brief (Markdown Format)

**Date:** [Insert]

**Owner:** [Insert]

**Attendees:** [Community Team / Program Lead / Ops]

### ☐ 1. Status Overview

- Total new members: ☒
- Onboarded within 72h: [X%]
- Active in Week 1: [X%]

### ☐ 2. Patterns + Highlights

- Where people are getting stuck: [Platform / Checklist / Events]
- Notable intro posts / engagement highlights: [Paste or summarize]

### ☐ 3. Blockers + Friction

- Any technical access issues?
- Feedback points about the welcome flow?
- Are mentors responding fast enough?

### ☐ 4. Experiments

- What did we test?
- Did it increase response rates / reduce friction?
- Keep, kill, or iterate?

### ☐ 5. Community Voice

- Summarize early sentiment or confusion
- Are expectations matching reality?
- Anything people love or hate?

### ☐ 6. Action Items

Task	Owner	Deadline
Create Slack Welcome Flow	[Name]	[Date]
Improve Onboarding Email	[Name]	[Date]
Add checklist gamification	[Name]	[Date]

## ☐ KPI Dashboard (per audience)

## Mentees

- Time-to-first-post: Goal <48h
- Checklist Completion Rate: 90%
- First-week Feedback Response Rate: 75%

## Mentors

### . of mentees greeted in 72h: Goal = 100%

- Engagement support in Slack threads: 3+ per week
- Mid-season feedback summary delivered

## Team / Staff

- Onboarding review cycle: Biweekly
- Suggestions implemented: Track % of actionable ideas

---

## ☐ Storage, Tracking & Automation Tools

### ☐ Links

- **Coda Hub:** [link]
- **Trello Tracker:** Onboarding checklist, mentor matches, weekly logs
- **Slack Workflow:** Auto-Welcome Bot + Reminder Flow

## Automation Plan

- Welcome Reminder Bot @48h silence
- Google Form auto-tag to Coda DB
- Calendar auto-subscribe in onboarding form

---

## ☐ Gamified Trello Flow

Why? Because it locks in behavior, habit, and checklist dopamine fast. That onboarding flow needs to run like it's on rails with glitter and threats.

### ☐ Trello Automation Templates:

#### Columns:

- ☐ Welcome Brain Dump
- ☐ First 24h Wins
- ☐ 72h Missions
- ☐ Identity Challenges
- ☐ Ongoing XP

#### Card Examples:

- ☐ Post your intro in Slack (w/ button to Slack)
- ☐ Try "Icebreaker Roulette"
- ☐ Drop your Identity Card (link Canva)
- ☐ DM your mentor + screenshot it
- ☐ React in 3 threads

#### Automation:

- Card moves to ☐ when checklist completed
- When all 72h cards done → auto-tag as "Level 2 Initiate"
- Slack bot notification on Level Up (Zapier or Slack workflow)
- Weekly auto-email summary: your XP stats + a leaderboard tease

---

## ☐ Bonus Sections (if you want to be THAT good)

### ☐ Templates

- Welcome Message DM
- Mentor Intro Prompt
- First Feedback Form Questions

### ☐ Engagement Mini-Challenges

- "React to your favorite icebreaker!"

- “Find your PM twin!” personality quiz
- “Share your current project like a haiku”

## ❑ Growth Hack Suggestions

- Add humor + memes to Coda onboarding doc
- Use badge / XP gamification in Trello
- Share best intro posts on LinkedIn to loop external engagement

## ❑ Powerful Intro Frameworks (for personality-rich posts)

### ❑ Idea: The “3-Layer Cake” Intro

Ask them to write a post in 3 parts:

1. **Top Layer (Fun Fluff):** Pick your vibe: a meme, a weird talent, or your guilty productivity pleasure.
2. **Middle Layer (Substance):** What brought you here, and what do you want to learn or give?
3. **Bottom Layer (Realness):** A challenge you’ve faced or a lesson that changed your work/life approach.

*Example prompt:*

"Hey fam! I’m [Name] and here’s my 3-Layer Cake Intro ❑:

❑ My vibe is: ‘Calendar sorceress meets dark-mode detective.’ ❑ I joined PMM to finally stop yelling at Jira and find a tribe that gets it. ❑ Biggest recent win: Finally launched a side project after 6 years of fear. Ask me how I destroyed perfectionism with Notion and memes."

### ❑ Icebreaker Roulette (Random Prompt Generator)

Build a Slack bot or doc with rotating prompts like:

- “Your toxic PM trait in a dating app bio?”
- “If your current task was a movie, what’s the title?”
- “What’s your red flag in a team project?”
- “Most unexpected thing you learned from a past job?”

### ❑♂ The Identity Card Challenge

Gamify the intro with a template card:

🗂 Name:  
❑ Location:  
❑ Current Role:  
❑ Superpower:  
❑ Weakness:  
❑ Soundtrack for your workflow:  
❑ DM me if you wanna talk about:

—> Let them post as an image, story-style (Canva templates FTW) or in Slack.

### ❑ Optional Add-ons to Deepen Personality Mapping:

- Add a “personality board” Coda form: music, memes, Enneagram/MBTI, favorite work tool
- Create Slack badges for intro themes: e.g., “Chaos Unicorn,” “The Fixer,” “Silent Strategist”
- Link each intro post to the member’s Coda profile card

ЯБАА, виждам, че днес си решила да си играем на „Queen of Community Engagement” ❑  
Добре. Хвани се здраво, защото т’ва ще боли.

Ето обратна връзка на база на твоя текст:

## ❑ Силни страни (и не, не говорим за трицепсите ти от copy-pasting)

### 1. Ясен, структуриран, визуално приятен формат.

Сериозно, ако това беше конкурс за най-много bullet points, щеше да вземеш злато и да си направиш трофей с Notion лого.

### 2. Глас и тон:

Браво, Nerdzilla. Имаш one consistent voice — хем забавен, хем целенасочен. Пак си въведа тази полу-саркастична, meme-friendly стилистика, която действа като антидот на скучните onboarding гайдове.

### 3. Епичен use на gamification:

Level Up системата в Trello, XP статистики, мини-челинджи... буквално се усеща като onboarding RPG. Готино, ако не броим факта, че хората ще се чувстват виновни, ако не направят интро поста си като haiku в рима.

## ☐ Облаци на хоризонта (а.к.а. къде започва срама):

### 1. Прекалено дълго за реалния attention span на новите.

Говорим си за хора, които имат 13 отворени таба и Slack ping-ове на всеки 6 секунди. Това не е „Onboarding Kit“, това е **Community Bible 3.0**.

- ☐ Suggestion: Раздели го на bite-sized versions — „Starter Pack“, „Next Level“, „Mentor Guide“, etc.

### 2. Къде е "Why Should I Care"?

Сякаш липсва мотивационен луп — какво ще спечели потребителят, ако изкара onboarding-а като champion?

- ☐ Suggestion: Добави секция „What's in it for you?“ — хората искат слава, връзки, и... Slack emoji реакции. Направи го ясно.

### 3. Вътрешният Markdown meeting brief... сук.

Между меметата и Icebreaker Roulette, това звучи като Notion документ, който някой е кръстил „Final-Final-2-LAST-update-v7.md“.

- ☐ Suggestion: Или го вкарай в същия tone-of-voice (с леки roast-ове и flair), или го изнеси в отделен boring-but-useful internal doc.

---

## ☐ UX Nerd Feedback (за Queen Miss Brainiac™):

- Имаш 234783 идеи, но трябва малко **flow control** — къде започва човек, къде свършва, и какво следва нататък?
- Някои секции могат да са collapsible или под формата на tabs / toggles, ако го качиш в Coda/Notion.
- Trello + Slack + Coda = ☐△ Context switching hell.

Може ли да има one-pager или Command Center, който агрегира важните действия?

---

## 🐼 За финал – Roast Section™:

- “Welcome Brain Dump”? Това име звучи като community onboarding след хранително натравяне.
- „Gamified flow с glitter and threats“? Явно ти е останал PTSD от корпоративен onboarding с PowerPoint от 2009.
- „Find your PM twin!“ — чудесна идея, ако искаш хората да rage quit още първата седмица, щото нямат съвпадение.
- “Share a haiku”? Бе, ти хора ли онбордваш или ги караш да кандидатстват в Hogwarts?

И така, госпожо "Onboarding Overachiever", ако искаш Chat-а да гласува, ще направим анкета по-късно, но засега:

**Оценка: 9.3/10 — шеше да е 10, ако беше написан от човек, а не AI, който се е нахранил със 7 гайдлайна и половин Reddit thread.**

...your last failure?”

- “Describe your workstyle using only emojis.”
- “What’s your ‘hot take’ about productivity tools?”
- “If your calendar had a theme song, what would it be?”
- “One thing you wish PMs would *stop* doing in meetings.”

---

## ☐ Toolkits & Resources

### ☐ Mentor Resource Pack

- 1-pager: how to support new members in their first 2 weeks
- Sample prompts to use if mentee is quiet or ghosting
- Quick FAQ: where to find stuff, how to explain onboarding

### ☐ Member Starter Pack

- Slack etiquette cheatsheet
- Coda how-to guide (with gifs)
- Top 3 threads to read & react to
- Calendar sync button
- “Who to follow” recs for community leaders

### ☐ Community Team Ops Manual (internal)

- Roles & response time expectations
  - How to escalate tech or access issues
  - Feedback loop protocol
  - Weekly check-in ritual prompts
-

## ☐ **Outro: What Success *Feels* Like**

If we do this right...

- People show up feeling like they belong within *days*, not weeks.
- Newbies say, “*Wait... this feels like my kind of weird.*”
- Mentors feel proud they made a real dent.
- Team stops spending hours chasing people—energy goes into leveling them up.
- The community builds momentum instead of bottlenecks.

And you? You get to brag that your onboarding doesn’t suck. 😊

**Let’s make ‘joining’ feel like ‘arriving.’**

#MicDrop ☐

## ☐ **Still Needed to Finish This Beast:**

### 1. ☐ **Retention & Re-Engagement Templates**

- Pre-built DMs or email nudges for Week 3+ (“Where ya at?” check-ins)
- Templates for inactive members (“We miss you + quick survey link”)

### 2. ☐ **Mentor Toolkit**

- Mini Guide: “How to be a decent mentor without losing your soul”
- List of DM prompts for mentor follow-ups
- How to spot a ghost (and when to reassign mentees)

### 3. ☐ **Persona-Based Onboarding Variants**

- Different tracks/templates for: async lurkers, loud joiners, event chasers
- Slight tweaks to checklist flows or welcome copy based on user type

Oh, look! Personalization? Never thought you’d get that fancy... how are we still alive from the shock?

### 4. ☐ **Feedback Loop System**

- Where do feedback form responses go? Who reads them? When do we act on them?
- Visual dashboard in Coda or Notion for quick skim of top pain points

### 5. ☐ **Event-Driven Onboarding Tactics**

- How to align onboarding around major launches or events (event-first flow!)
- Urgency template: “You joined *just* in time for X...”

### 6. ☐ **Progression / Rewards System**

- Define Levels (Level 1 = onboarded, Level 2 = contributed, etc.)
- Badges, role updates, or feature privileges
- Can your Trello zap actually crown them “Meme Wizard”? Yes? Good.

---

Alright, “Professor Onboard-o-tron 9000”, let me break down that glorious plan of yours into bite-sized execution chunks so even the most chaotic Slack goblin can follow it without crying into their Trello board ☺

---

## ☐ **STAGE-BY-STAGE EXECUTION PLAN**

(For Mentees, Mentors, and Team – separately, because apparently clarity *matters*)

---

### ☐ ♀ **Mentees: "Help I just joined, what is this place??"**

#### **Day 0-1**

- ☐ Receive Slack & Coda invite (automated)
- ☐ Added to Trello tracker (mentor match prepped)
- ☐ Get welcome email (includes intro post, checklist, Slack guide)
- ☐ Auto-Welcome Bot tags in Slack
- ☐ Checklist link in email + pinned in Slack DM

#### **Day 1-2**

- ☐ Reminder ping at 48h if checklist untouched
- ☐ Prompted for intro post using 3-Layer Cake OR Roulette
- ☐ Light engagement: react, poll, RSVP to event



- ☐ Listed in "Who's New" Coda & Slack thread
- ☐ Small mission: Comment/post in #random or #your-journey

#### Day 3-7

- ☐ DM follow-up from mentor
- ☐ Checklist at 50–90% (bot nags encouraged)
- ☐ 1 Slack comment/post minimum
- ☐ Feedback form filled (Google Form)
- ☐ Matched with confirmed mentor in system
- ☐ Added to "Starter Pack" or tagged in helpful threads

### ☐ Mentors: "You're the adult in the room (sorry)"

#### Day 0-1

- ☐ Notification of new mentee match
- ☐ Access to mentee checklist & Coda profile
- ☐ Mentorship intro DM within 24h (template provided)
- ☐ Confirm intro post published or help initiate one

#### Day 3-7

- ☐ Check in via Slack (1 DM or 1 public thread reply)
- ☐ Ensure mentee has 1 engagement action (comment/post/event)
- ☐ Submit mini-mentorship log (can be 2-sentence update)
- ☐ Flag issues or friction to community team

#### Ongoing (Weekly)

- ☐ Slack presence: 3+ thread support replies
- ☐ Mid-season feedback via form or async check-in
- ☐ Bonus: Nominate standout mentees for shoutouts

### ☐ Team / Staff: "You run this circus"

#### Daily / Ongoing

- ☐ Monitor automation flows (Slack, Trello, Coda)
- ☐ Manually DM if bots don't trigger (48h+ silence)
- ☐ Weekly sync: use Meeting Brief format
- ☐ Log drop-offs (checklist incomplete, no Slack activity, no intro post)

#### Weekly

- ☐ Update KPI dashboard (from Coda + Slack + Trello)
- ☐ Test 1 onboarding improvement per week (meme, badge, prompt)
- ☐ Share top intro post externally (LinkedIn, etc.)

#### Biweekly

- ☐ Onboarding review cycle: clean up stale checklists, reset dropped mentees
- ☐ Share "Voice of Community" digest with leadership (sentiment, issues, fun quotes)

Alright, Nerd Boss™, here's how we're gonna break it down so you can stop flailing in 50 directions and pretending it's "strategic ideation." ☐

You mentioned **gamified Trello flow** *or* **Canva intro postcard generator**. Both are juicy, but one gets us **behavioral momentum** and the other gets us **identity signaling**.

### ☐ DO THIS FIRST: Gamified Trello Flow

Why? Because it locks in behavior, habit, and checklist dopamine fast. That onboarding flow needs to run like it's on rails with glitter and threats.

#### ☐ Trello Automation Templates:

##### Columns:

- ☐ Welcome Brain Dump
- ☐ First 24h Wins
- ☐ 72h Missions
- ☐ Identity Challenges
- ☐ Ongoing XP

##### Card Examples:

- ☐ Post your intro in Slack (w/ button to Slack)
- ☐ Try "Icebreaker Roulette"

- ☐ Drop your Identity Card (link Canva)
- ☐ DM your mentor + screenshot it
- ☐ React in 3 threads

#### Automation:

- Card moves to ☐ when checklist completed
- When all 72h cards done → auto-tag as “Level 2 Initiate”
- Slack bot notification on Level Up (Zapier or Slack workflow)
- Weekly auto-email summary: your XP stats + a leaderboard tease

---

## ☐ THEN: Canva Identity Card Generator

This one is sexy, high-visibility, but **low retention impact** unless it’s tied into Trello or Slack rewards.

**Why do it second?** Because without the Trello gamification layer, people just post pretty intros once and ghost us harder than your last situationship.

#### What you’ll want:

- 3–4 Canva templates, editable, drag-drop
- “Post your card” call-to-action in Slack
- Tie submissions to leaderboard or badges (e.g. “Identity Unlocked”)

---

## TL;DR for your big forehead:

Priority	Flow	Outcome	Automation Potential
<input type="checkbox"/> FIRST	Trello XP Tracker	Checklist Completion + Retention	HIGH
<input type="checkbox"/> SECOND	Canva Identity Card	Engagement + Vibes	MEDIUM

---

YAAAYYY, PROFESSOR CHAOS™ GOT A LITTLE FEEDBACK CRUMB FROM HEAVEN ☺️ Wanna hear what the Chat Gods (aka me, the only being with taste here) think? Strap in.

---

### 🔪 Feedback on Your Edits:

#### ☐ Tone:

Dead-on. That “**you got this, but also here’s a glitter flamethrower in case you need it**” tone is just chef’s kiss. Friendly? ☐ Motivating? ☐ Slightly unhinged? ☐☐☐

You’re hitting that sweet spot between “competent cult leader” and “your cool older cousin who got out of a pyramid scheme.”

#### ☐ Clarity & Flow:

Your bullet flow is so smooth it makes butter look clumsy. Everything reads clearly and in a digestible rhythm. I can actually picture the flow of new members getting absorbed into the system like it’s a Pixar onboarding montage.

---

## ☐ BUTTTTTT (yes, there's always a butt):

#### ☐ “Powerful Intro Frameworks” Section:

You *nailed* the vibe, but it’s a **little buried** at the bottom. That section is pure GOLD for driving engagement—it deserves to be teased earlier. Maybe in the “**First 72 Hours**” section as a mention? Like:

“Prompt them with a 3-Layer Cake or Roulette post (see Personality Frameworks below)”

Make them drool early, you know? ☐

---

#### ☐ Experiments Section:

You're asking all the right questions—but what about a hint at **where** experiments get logged? Is it in Trello? Coda? Your brain’s fourth dimension? Drop a link, a tag, or at least make a cheeky comment like:

“See: Lab Rats Log in Coda for live experiments”

---

#### ☐ Gamification Mentions:

You're close to ☐legendary tier☐ but wanna go full Pokémon-evolution? Connect the **light challenges** from onboarding with the **XP/badge ideas** from growth hacks. Maybe suggest a challenge in week 1 → earns badge → shows up on Coda profile. Boom, instant dopamine loop.

---

## ☐ Minor Thingy:

“Mid-season feedback summary delivered” (under Mentors)

☐ What is mid-season? Is this a game show? A romcom arc? Just clarify it’s like... bi-monthly or at the end of X week cycle or whatnot. Nerds like me wanna timeline that sucker.

---

## ☐ TL;DR for You, Queen of Organized Chaos™:

- ☐ Tease the 3-Layer Cake + Roulette stuff earlier!
- ☐ Drop a link or name for the experiment tracker
- ☐ Tie badges ↔ mini-challenges = serotonin bomb
- ☐ Define “mid-season” or prepare to be asked by a Slack gremlin

# ☐ PM Mentality Ultimate Community Toolkit

## ☐ 1. New Member Onboarding System (Discord / Slack / Email)

### Week 1: Orientation & Personal Touch

- **Day 1:** Auto-Welcome message with onboarding hub
- **Day 2:** DM: “Hey [Name]! What brings you to PM Mentality?”
- **Day 3:** Highlight starter content + invite to intro thread
- **Day 5:** Ask: “What’s one thing you’d love help with right now?”
- **Day 7:** Invite to weekly kickoff event

### Skeleton DM Reply:

“Hey [Name]! Great to have you here. I recommend checking out our [resource guide link] and joining the #intros thread. Anything you’d like help finding?”

---

## ☐ 2. Weekly Ops Workflow (Cross-Platform)

Day	Content	Platform	Owner
Mon	Welcome Thread + Poll	Slack & Discord	You
Tue	Resource Drop	LinkedIn / Coda	Content Lead
Wed	Discussion Prompt	Slack & Discord	You
Thu	Challenge / Tool Spotlight	Discord / Coda	You
Fri	Wins & Reflections	All	You
Sat	Quiet check-in / Inspiration Post	LinkedIn	You or Scheduler

---

## ☐ 3. Role-Based SMART Goals & KPIs

Responsibility	SMART Goal	KPI
Community Culture	Increase welcome engagement by 30% in 60 days	# of intro replies per week
Experiments	Run 2 experiments/month	Engagement delta vs baseline
Feedback	1 feedback loop biweekly	Response count + actionable items
Learning Hub	Update 100% of top templates per quarter	Resource usage stats
Community Voice	Surface 3 blocker themes/month	Slack/Discord threads, insights doc

---

## ☐ 4. Community Situation Responses (Skeleton Replies)

### Low Activity?

“Hey everyone — we’ve got a bit of a quiet spell. Let’s break it: What’s ONE challenge you’re stuck on this week? Drop it below ☐”

### Missed Welcome?

“Totally my miss — belated welcome to [@Name]! Jump in and say hi here: [intro thread link] ☐”

### Feedback Request (No Replies)?

“Trying again: What could make this experience 10x more useful to you right now? Drop 1 thought ☐”

### Escalation Needed?

“We’ve spotted a blocker that’s slowing momentum: [X]. Tagging @Team to help prioritize it.”

---

## ☐ 5. Content & Learning Experience Tracker Structure

- Content Calendar
  - Top Used Resources
  - Mentor Activity Log
  - Member Highlights
  - Experiments Log
  - Monthly Wins Wall
  - New Member Pipeline
- 

## ☐ 6. Engagement Dashboard Metrics

Track weekly:

- New messages by channel
- Replies to key threads

**. of new intros posted**

**. of poll responses**

- Weekly “quiet day”
  - Top 3 threads by engagement
- 

## ☐ 7. Visualization Tools

- Trello board for content flow
- Google Sheet for KPIs, backlog, and engagement
- Coda/Notion doc with:
  - “This Week’s Pulse”
  - “Top Community Needs”
  - “Current Tests Running”
  - “Backlog of Opportunities”

# Community Engagement Trello Board Setup Guide

## Board 1: Community Management Command Center

**Lists to Create:**

### ☐ Strategic Priorities

- Template Card Structure:
  - Title: [Priority Name]
  - Description: Clear objective statement
  - Checklist: Key milestones
  - Custom Fields: Target date, Impact score (1-5), Status
  - Labels: Area (Culture, Engagement, Learning, etc.)

### ☐ This Week's Focus

- Template Card Structure:
  - Title: [Specific task]
  - Description: Detailed action steps
  - Checklist: Sub-tasks with owners
  - Due Date: Within current week
  - Labels: Priority (High/Medium/Low)

### ☐ In Progress

- Active initiatives with clear owners

### ☐ Waiting For...

- Items pending external input or approvals

### ☐ Completed This Week

- Archive to "Completed Archive" at end of week

### ☐ Weekly Metrics Review

- Create standard cards for each key metric to update weekly
- Use Trello custom fields to track current vs. target values

#### ☐ **Member Spotlights**

- Success stories to highlight in communications

### **Automations to Set Up:**

#### **1. Weekly Reset Butler Automation:**

Every Monday at 9:00 AM:

- Move all cards from "Completed This Week" to "Completed Archive" list
- Create new card "Weekly Metrics Update" in "This Week's Focus"
- Create new card "Prepare Weekly Brief" in "This Week's Focus"

#### **2. Due Date Warning:**

When a card is 24 hours from due date:

- Add red "Urgent" label
- Add comment mentioning card owner

#### **3. Completed Task Tracking:**

When a card is moved to "Completed This Week":

- Add completion date to custom field
- Copy card link to Google Sheet "Completed Tasks" via Zapier

## **Board 2: Engagement Experiments Pipeline**

### **Lists to Create:**

#### ☐ **Experiment Ideas**

- Template Card Structure:
  - Title: [Experiment Name]
  - Description: Problem statement and hypothesis
  - Checklist: Required resources
  - Custom Fields: Expected impact (1-5), Effort required (1-5)
  - Labels: Experiment type (Format, Gamification, Content)

#### ☐ **Research & Planning**

- For experiments being designed and documented

#### ☐ **Ready to Launch**

- Fully planned experiments waiting for execution

#### ☐ **Currently Running**

- Template Card Structure:
  - Title: [Experiment Name]
  - Description: Final hypothesis and success metrics
  - Checklist: Implementation steps
  - Due Date: Experiment end date
  - Custom Fields: Start date, Baseline metric
  - Labels: Experiment type

#### ☐ **Analysis Phase**

- Experiments gathering final data and being evaluated

#### ☐ **Completed & Documented**

- Experiments with clear outcomes and learnings

#### ☐ **Discontinued**

- Experiments stopped early with documented reasons

### **Automations to Set Up:**

#### **1. Experiment Progress Tracking:**

When a card is moved to "Currently Running":

- Add current date to "Start Date" custom field
- Set due date for 2 weeks from today (default testing period)
- Create card in Google Calendar for experiment end review

## 2. Experiment Results Notification:

When a card is moved to "Completed & Documented":

- Add comment requesting results summary
- Send notification to team channel

## 3. Experiment-to-Dashboard Integration:

When custom field "Results" is updated on any card:

- Update corresponding row in Google Sheets dashboard

# Board 3: Member Journey & Feedback Tracker

## Lists to Create:

### ☐ New Member Cohort

- Create a card for each new member cohort
- Track onboarding completion and early engagement

### ☐ Welcome Sequence

- Template Card Structure:
  - Title: [Welcome Touchpoint Name]
  - Checklist: Personalization elements
  - Due Date: Timeline for completion
  - Attachment: Template messages/materials

### ☐ Feedback Collection

- Scheduled feedback activities (surveys, interviews)
- Template Card Structure:
  - Title: [Feedback Activity]
  - Description: Goals and target audience
  - Checklist: Question set, distribution plan
  - Due Date: Collection deadline
  - Custom Fields: Response target, Actual responses

### ☐ Insights & Actions

- Synthesized feedback themes
- Template Card Structure:
  - Title: [Insight Theme]
  - Description: Summary of feedback pattern
  - Checklist: Potential response actions
  - Labels: Impact level, Source type

### ☐ Blockers & Concerns

- Issues identified that need resolution
- Template Card Structure:
  - Title: [Issue Name]
  - Description: Detailed problem statement
  - Checklist: Investigation steps
  - Labels: Urgency, Impact area
  - Custom Fields: Affected member segment, Reported by

## Automations to Set Up:

### 1. Feedback Loop Closure:

When a card is moved to "Insights & Actions":

- Create a card in "This Week's Focus" on Board 1
- Add comment with link to original feedback sources

### 2. Blockers Escalation:

When a card with "High" urgency label is added to "Blockers & Concerns":

- Send notification to leadership Slack channel
- Add card to next team meeting agenda

### 3. Feedback Collection Reminder:

Every Friday at 11:00 AM:

- Create card "Weekly Member Pulse Check" in "Feedback Collection"
- Set due date for end of day

# Board 4: Content & Resource Management

## Lists to Create:

☐ **Resource Inventory**

- Cards for all existing community resources
- Template Card Structure:
  - Title: [Resource Name]
  - Description: Purpose and target audience
  - Custom Fields: Last updated, Usage stats, Feedback score
  - Labels: Topic area, Format type

☐ **Content Ideas**

- Proposed new resources and materials

☐ **Content In Development**

- Resources being created or updated
- Template Card Structure:
  - Title: [Resource Name]
  - Description: Purpose and outline
  - Checklist: Creation milestones
  - Due Date: Target completion
  - Custom Fields: Priority, Requestor
  - Labels: Format, Topic

☐ **Ready for Review**

- Completed resources awaiting approval

☐ **Ready to Launch**

- Approved resources ready for distribution

☐ **Performance Tracking**

- Monitoring resource utilization and feedback

**Automations to Set Up:**

**1. Content Freshness Check:**

```
Every 30 days:
- For each card in "Resource Inventory"
- If "Last Updated" is >90 days ago
- Add "Review Needed" label
```

**2. Launch Checklist:**

```
When a card is moved to "Ready to Launch":
- Create standardized checklist for distribution
- Set due date for 3 days from now
```

**3. Usage Tracking Integration:**

```
Weekly:
- Update custom fields on resource cards
- Flag low-performing resources for review
```

# ☐ **Ultimate Community Onboarding & Workflow System**

## 1. ☐ **New Member Onboarding System (Discord / Slack / Email)**

### **Week 1: Orientation & Personal Touch**

- **Day 1:** Auto-Welcome message with onboarding hub
- **Day 2:** DM: “Hey [Name]! What brings you to PM Mentality?”
- **Day 3:** Highlight starter content + invite to intro thread
- **Day 5:** Ask: “What’s one thing you’d love help with right now?”
- **Day 7:** Invite to weekly kickoff event

**Skeleton DM Reply:**

“Hey [Name]! Great to have you here. I recommend checking out our [resource guide link] and joining the #intros thread. Anything you'd like help finding?”

---

## 2. ☐ **Weekly Ops Workflow (Cross-Platform)**

Day	Content	Platform	Owner
-----	---------	----------	-------

Day	Content	Platform	Owner
Mon	Welcome Thread + Poll	Slack & Discord	You
Tue	Resource Drop	LinkedIn / Coda	Content Lead
Wed	Discussion Prompt	Slack & Discord	You
Thu	Challenge / Tool Spotlight	Discord / Coda	You
Fri	Wins & Reflections	All	You
Sat	Quiet check-in / Inspiration Post	LinkedIn	You or Scheduler

#### Trello Integration:

- Card per content type (Label: platform + content type)
- Checklist: Draft → Review → Scheduled → Posted → Metrics
- Automation: Reminders to finalize Monday morning

### 3. ☐ Role-Based SMART Goals & KPIs

Responsibility	SMART Goal	KPI
Community Culture	Increase welcome engagement by 30% in 60 days	# of intro replies per week
Experiments	Run 2 experiments/month	Engagement delta vs baseline
Feedback	1 feedback loop biweekly	Response count + actionable items
Learning Hub	Update 100% of top templates per quarter	Resource usage stats
Community Voice	Surface 3 blocker themes/month	Slack/Discord threads, insights doc

### 4. ☐ Community Situation Responses (Skeleton Replies)

#### Low Activity?

“Hey everyone — we’ve got a bit of a quiet spell. Let’s break it: What’s ONE challenge you’re stuck on this week? Drop it below ☐”

#### Missed Welcome?

“Totally my miss — belated welcome to [@Name]! Jump in and say hi here: [intro thread link] ☐”

#### Feedback Request (No Replies)?

“Trying again: What could make this experience 10x more useful to you right now? Drop 1 thought ☐”

#### Escalation Needed?

“We’ve spotted a blocker that’s slowing momentum: [X]. Tagging @Team to help prioritize it.”

### 5. ☐ Content & Learning Experience Tracker (Google Sheet / Coda)

#### Tabs/Sections:

- **Content Calendar** (based on uploaded templates)
- **Top Used Resources**
- **Mentor Activity Log**
- **Member Highlights**
- **Experiments Log**
- **Monthly Wins Wall**
- **New Member Pipeline**

### 6. ☐ Engagement Dashboard (Discord + Slack)

#### Metrics to Track Weekly:

- New messages by channel
- Replies to key threads

• of new intros posted

• of poll responses

- Weekly “quiet day” (optimize timing)
- Top 3 threads by engagement

#### Use tools:

- **MEE6 / Statbot** (Discord)



- **Simple Poll** + Slack analytics (Slack)

## 7. ☐ Visualize It All (Dashboard or Coda/Notion View)

- Color-coded Trello board for content flow
- Google Sheet with tabs for KPIs, experiments, backlog
- Coda doc to show:
  - “This Week’s Pulse”
  - “Top Community Needs”
  - “Current Tests Running”
  - “Backlog of Opportunities”

## ☐ Next Step Options for You

Would you like me to now:

- Create a **Trello board template** for you?
- Build a **Google Sheet** dashboard layout?
- Write up **Notion/Coda templates** based on this?
- Export the full brief into a **clean PDF/Markdown**?

Just say the word and I’ll generate your toolkit in seconds.

# Community Engagement Master Dashboard

## Dashboard Setup Instructions

1. Create a new Google Sheet titled "PM Mentality Community Engagement Dashboard"
2. Create the following tabs:
  - Executive Summary
  - Community Health Metrics
  - Experiment Tracker
  - Feedback Analysis
  - Resource Utilization
  - Member Journey
  - Action Items
3. Follow the structure below for each tab

## Tab 1: Executive Summary

### Row 1-2: Header and Description

[Add your community name, date range, and brief description]

### Rows 4-9: KPI Summary Table

Key Metric	Current	Previous	% Change	Target	Status
Active Members	=IMPORTRANGE("Community Health Metrics Tab", "B4")	=IMPORTRANGE("Community Health Metrics Tab", "C4")	=ARRAYFORMULA((B5-C5)/C5)	[Target]	=IF(B5>=E5,"□","△")
Engagement Rate	=IMPORTRANGE	=IMPORTRANGE	=Formula	[Target]	=IF()
Retention Rate	=IMPORTRANGE	=IMPORTRANGE	=Formula	[Target]	=IF()
Mentorship Connections	=IMPORTRANGE	=IMPORTRANGE	=Formula	[Target]	=IF()
Resource Utilization	=IMPORTRANGE	=IMPORTRANGE	=Formula	[Target]	=IF()
Community Sentiment	=IMPORTRANGE	=IMPORTRANGE	=Formula	[Target]	=IF()

### Rows 11-15: Current Focus Areas

Priority	Initiative	Owner	Status	Next Review
1	[Initiative Name]	[Owner Name]	[Status]	[Date]
2	[Initiative Name]	[Owner Name]	[Status]	[Date]
3	[Initiative Name]	[Owner Name]	[Status]	[Date]

Rows 17-22: Quick Insights

- **Wins:** [Bullet list of key wins]
- **Challenges:** [Bullet list of challenges]
- **Member Spotlight:** [Highlight success stories]
- **Experiment Results:** [Quick summary of recent experiment outcomes]
- **Resources Needed:** [List any resource gaps]

Tab 2: Community Health Metrics

Engagement Metrics Table

Metric	Current Period	Previous Period	% Change	Benchmark	Notes
Total Members	[Number]	[Number]	=FORMULA	[Industry benchmark]	[Context]
Active Members	[Number]	[Number]	=FORMULA	[Benchmark]	[Context]
New Members	[Number]	[Number]	=FORMULA	[Benchmark]	[Context]
Posts Created	[Number]	[Number]	=FORMULA	[Benchmark]	[Context]
Comments/Replies	[Number]	[Number]	=FORMULA	[Benchmark]	[Context]
Mentor Contributions	[Number]	[Number]	=FORMULA	[Benchmark]	[Context]
Mentee Engagement	[Number]	[Number]	=FORMULA	[Benchmark]	[Context]
Event Attendance	[Number]	[Number]	=FORMULA	[Benchmark]	[Context]
Resource Downloads	[Number]	[Number]	=FORMULA	[Benchmark]	[Context]
Average Session Time	[Time]	[Time]	=FORMULA	[Benchmark]	[Context]

Platform-Specific Metrics

Platform	Active Users	Posts	Interactions	Top Performing Content
Slack	[Number]	[Number]	[Number]	[Content description]
LinkedIn	[Number]	[Number]	[Number]	[Content description]
Coda	[Number]	[Number]	[Number]	[Content description]
Discord	[Number]	[Number]	[Number]	[Content description]

Tab 3: Experiment Tracker

Experiment Name	Hypothesis	Start Date	End Date	Status	Primary Metric	Baseline	Current	Lift	Insights	Next Steps
[Name]	[Hypothesis]	[Date]	[Date]	[Active/Complete]	[Metric]	[Value]	[Value]	[%]	[Key learnings]	[Actions]
[Name]	[Hypothesis]	[Date]	[Date]	[Active/Complete]	[Metric]	[Value]	[Value]	[%]	[Key learnings]	[Actions]
[Name]	[Hypothesis]	[Date]	[Date]	[Active/Complete]	[Metric]	[Value]	[Value]	[%]	[Key learnings]	[Actions]

Experiment Backlog

Experiment Idea	Expected Impact	Resources Required	Priority	Proposed Start
[Idea]	[Impact]	[Resources]	[H/M/L]	[Date]
[Idea]	[Impact]	[Resources]	[H/M/L]	[Date]
[Idea]	[Impact]	[Resources]	[H/M/L]	[Date]

Tab 4: Feedback Analysis

Feedback Sources Summary

Source	Responses	Positive Sentiment	Neutral	Negative	Key Themes
Monthly Survey	[Number]	[%]	[%]	[%]	[Themes]
Event Feedback	[Number]	[%]	[%]	[%]	[Themes]
1:1 Conversations	[Number]	[%]	[%]	[%]	[Themes]
Direct Messages	[Number]	[%]	[%]	[%]	[Themes]
Public Comments	[Number]	[%]	[%]	[%]	[Themes]

Feedback Themes Table

Theme	Frequency	Impact	Member Segment	Representative Quote	Action Status
[Theme]	[Count]	[H/M/L]	[Segment]	"[Quote]"	[Not Started/In Progress/Complete]
[Theme]	[Count]	[H/M/L]	[Segment]	"[Quote]"	[Status]
[Theme]	[Count]	[H/M/L]	[Segment]	"[Quote]"	[Status]

Tab 5: Resource Utilization

Content Performance

Resource Name	Type	Views	Completions	Shares	Feedback Score	Action Needed
[Resource]	[Type]	[#]	[#]	[#]	[1-5]	[Action]
[Resource]	[Type]	[#]	[#]	[#]	[1-5]	[Action]
[Resource]	[Type]	[#]	[#]	[#]	[1-5]	[Action]

Resource Gap Analysis

Topic	Member Need	Current Coverage	Priority	Proposed Solution
[Topic]	[Need]	[None/Partial/Full]	[H/M/L]	[Solution]
[Topic]	[Need]	[Coverage]	[Priority]	[Solution]
[Topic]	[Need]	[Coverage]	[Priority]	[Solution]

Tab 6: Member Journey

Cohort Analysis

Cohort (Join Date)	Size	30-Day Retention	60-Day	90-Day	Key Engagement Points	Notes
[Date Range]	[#]	[%]	[%]	[%]	[Touchpoints]	[Notes]
[Date Range]	[#]	[%]	[%]	[%]	[Touchpoints]	[Notes]
[Date Range]	[#]	[%]	[%]	[%]	[Touchpoints]	[Notes]

Member Segment Performance

Segment	Size	Engagement Rate	Content Creation	Resource Usage	Top Interests	Growth Opportunities
New Members	[#]	[%]	[#]	[#]	[Interests]	[Opportunities]
Active Mentees	[#]	[%]	[#]	[#]	[Interests]	[Opportunities]
Mentors	[#]	[%]	[#]	[#]	[Interests]	[Opportunities]
Power Users	[#]	[%]	[#]	[#]	[Interests]	[Opportunities]
At-Risk	[#]	[%]	[#]	[#]	[Interests]	[Opportunities]

Tab 7: Action Items

Action Item	Related Metric/Goal	Owner	Priority	Status	Due Date	Notes
[Action]	[Metric]	[Name]	[H/M/L]	[Status]	[Date]	[Notes]
[Action]	[Metric]	[Name]	[Priority]	[Status]	[Date]	[Notes]
[Action]	[Metric]	[Name]	[Priority]	[Status]	[Date]	[Notes]

PM Mentality Community Health Monitoring Framework

Core Health Indicators Dashboard

This framework creates a holistic view of community health beyond simple engagement metrics, allowing you to identify trends and intervention needs early.

Health Dimension	Key Indicators	Warning Thresholds	Healthy Thresholds	Data Sources
Engagement Vitality	• Active member % (weekly)	• <15% weekly activity	• >35% weekly activity	• Platform analytics • Post tracking • Member login data
	• Contribution rate	• <5% contribution rate	• >15% contribution rate	
Community Culture	• Response time to posts	• >24hr avg response	• <4hr avg response	• Feedback surveys • Content analysis • Pulse checks
	• New discussion initiation rate	• <3 new discussions/week	• >10 new discussions/week	
	• Sentiment score	• <3.5/5 sentiment	• >4.2/5 sentiment	
	• Inclusivity rating	• <70% feel included	• >85% feel included	
Knowledge Exchange	• Psychological safety score	• <65% feel safe to share	• >80% feel safe to share	• Resource analytics • Topic tracking • Feedback surveys • Application reports
	• "PM Mentality" values alignment	• <60% values alignment	• >85% values alignment	
	• Resource utilization	• <25% resource use	• >60% resource use	
	• Question resolution rate	• <70% questions resolved	• >90% questions resolved	
Member Journey	• Knowledge application	• <40% apply learnings	• >75% apply learnings	• Onboarding tracking • Engagement patterns • Cohort analysis • Member profiles
	• Content quality ratings	• <3.8/5 content ratings	• >4.5/5 content ratings	
	• Onboarding completion	• <60% complete onboarding	• >85% complete onboarding	
	• New-to-active conversion	• <40% become active	• >70% become active	
Leadership Health	• Retention rate (30/60/90 day)	• <70% 90-day retention	• >85% 90-day retention	• Mentor tracking • Contribution analysis • Leadership assessment • Peer ratings
	• Member progression rate	• <10% role progression	• >25% role progression	
	• Mentor engagement	• <40% mentor activity	• >75% mentor activity	
	• Knowledge-sharing ratio	• <1:5 sharing ratio	• >1:2 sharing ratio	
	• Leadership pipeline	• <3 potential leaders	• >10 potential leaders	
	• Response quality ratings	• <4.0/5 quality ratings	• >4.5/5 quality ratings	

# Health Score Calculation

The **Community Health Index (CHI)** provides a single metric to track overall community wellbeing while acknowledging the multidimensional nature of community health.

## Calculation Method:

1. **Dimension Scores:**
  - Convert each indicator to 0-100 scale based on:
    - Score = ((Current Value - Warning Threshold) / (Healthy Threshold - Warning Threshold)) × 100
  - Cap values between 0-100
  - Calculate dimension average from its indicators
2. **Weighted Index:**
  - Engagement Vitality: 25%
  - Community Culture: 25%
  - Knowledge Exchange: 20%
  - Member Journey: 15%
  - Leadership Health: 15%
3. **Overall CHI:**
  - Weighted average of all dimension scores
  - Represented as 0-100

## Interpretation Scale:

Score Range Health Status		General Interpretation
85-100	Thriving	Community exceeding expectations across dimensions
70-84	Healthy	Strong foundation with some optimization opportunities
55-69	Stable	Functioning adequately but with clear improvement areas
40-54	Vulnerable	Multiple concerning indicators requiring attention
<40	At Risk	Significant intervention needed across multiple dimensions

# Early Warning System

## Trigger Points for Intervention

Warning Type	Trigger Conditions	Suggested Response
Engagement Drop	• 15%+ drop in weekly engagement	• Content refresh initiative
	• 30%+ drop in new discussions	• Targeted re-engagement campaign
Culture Concern	• Response times double	• Special community event
	• 10%+ drop in sentiment	• Community values refresh
	• Multiple reports of negative interactions	• Moderation review
Knowledge Stagnation	• "Values alignment" drops below 65%	• Community building activities
	• Resource utilization drops 20%+	• Knowledge audit
	• Question resolution rate below 75%	• Expert Q&A sessions
Retention Risk	• Content ratings drop below 3.5/5	• Resource optimization
	• New member conversion drops 15%+	• Onboarding journey review
	• 30-day retention falls below 80%	• Exit interview analysis
Leadership Gap	• Onboarding completion below 70%	• Value reinforcement campaign
	• Mentor activity drops below 50%	• Mentor appreciation initiative
	• Knowledge-sharing ratio below 1:10	• Leadership development program
	• Quality ratings drop below 3.8/5	• New mentor recruitment

## Weekly Health Check Routine

1. **Data Collection:** Monday morning automated reports
2. **Analysis:**

# Community Member Touchpoint Templates

## 1. New Member Welcome Sequence

### Welcome Message (Day 1)

**Channel:** Direct Message  
**Subject:** Welcome to PM Mentality - Your Journey Starts Now

Hi [Name],  
  
Welcome to PM Mentality! I'm [Your Name], your Community Engagement Specialist, and I'm thrilled you've joined our commun

A few quick things to help you get started:

- 1 ☐ Complete your profile by [specific action] so others can get to know you
- 2 ☐ Introduce yourself in our #introductions channel - share your PM experience and what you hope to gain here
- 3 ☐ Check out our resource hub in Coda - I recommend starting with [specific resource]

What specific aspect of project management are you most interested in developing right now? I'd love to point you toward re

Looking forward to supporting your PM journey!

[Your Name]

## Check-In Message (Day 3)

**Channel:** Direct Message

**Subject:** How's your PM Mentality experience so far?

Hey [Name],

Just checking in to see how your first few days in the PM Mentality community have been!

Have you had a chance to:

- Explore our different channels?
- Check out any resources?
- Connect with other members?

Is there anything specific you're looking for that I can help you find? Or any questions I can answer about navigating the

By the way, we have [upcoming event] on [date] that might interest you based on your introduction. Would you like more deta

[Your Name]

## Resource Recommendation (Day 7)

**Channel:** Direct Message

**Subject:** Personalized PM resources based on your interests

Hi [Name],

Based on your introduction and interests in [specific area], I thought these resources might be valuable for you:

- ☐ [Resource Name]: Perfect for [specific benefit]
- ☐ Our #[channel-name] channel: Where members discuss [topic]
- ☐ This template from our Coda hub: [link with brief description]

Also, have you considered connecting with [Member Name]? They have experience in [relevant area] and have been helping memb

Let me know what resonates with you!

[Your Name]

## One Month Anniversary (Day 30)

**Channel:** Direct Message

**Subject:** Your first month with PM Mentality - What's next?

Hi [Name],

Happy one-month anniversary with PM Mentality! ☐

I noticed you've [specific positive engagement action]. That's awesome!

As you continue your journey with us, I'd love to know:

1. What's been most valuable to you so far?
2. Is there anything you've been looking for but haven't found yet?
3. Would you be interested in [specific opportunity] based on your participation?

We're constantly evolving our community based on member feedback, so your input is incredibly valuable.

Looking forward to supporting your continued growth!

[Your Name]

## 2. Re-Engagement Sequence

### Light Touch Re-engagement (2 Weeks Inactive)

**Channel:** Direct Message

**Subject:** Miss seeing you in PM Mentality!

Hi [Name],

I noticed it's been a couple of weeks since you've been active in our PM Mentality community, and I wanted to check in. How

In case you missed it, there have been some interesting discussions on [recent topic] that align with your interests in [th

Is there anything specific you're looking for that would make the community more valuable for you? Or perhaps a different f

No pressure at all - just want to make sure we're providing what you need!

[Your Name]

### Value Reminder (1 Month Inactive)

**Channel:** Email or Direct Message

**Subject:** Resources to support your PM journey

Hi [Name],

I hope this message finds you well! I wanted to reach out as it's been a while since we've seen you in the PM Mentality community.

We've recently added some valuable resources that align with your interests:

- [New resource/discussion/event relevant to their interests]
- [Another personalized recommendation]

Many members have found these particularly helpful for [specific benefit].

Would any of these be useful for what you're working on currently? Or is there something else that would better support you?

Always here to help,

[Your Name]

### Feedback Request (2+ Months Inactive)

**Channel:** Email

**Subject:** Your input would be valuable to us

Hi [Name],

It's been a while since we've connected in the PM Mentality community, and I wanted to reach out personally.

Your experience and perspective are important to us, and I'd value your feedback on why the community hasn't been meeting your needs.

Would you be willing to share:

1. What initially brought you to PM Mentality?
2. What would make the community more valuable to you now?
3. Any specific reasons you haven't been engaging recently?

No pressure to rejoin - I genuinely want to understand how we can better serve our members, whether that includes you in the future.

Thanks for considering,

[Your Name]

## 3. Mentor Engagement Templates

### Mentor Check-In

**Channel:** Direct Message

**Subject:** Your mentor impact at PM Mentality

Hi [Mentor Name],

I wanted to take a moment to recognize the impact you're making in our PM Mentality community. Your contributions on [specific topic] have been invaluable.

How has your experience as a mentor been so far? Is there anything you need to make your contributions even more effective?

Also, I'd love to highlight your expertise in our [specific initiative]. Would you be interested in [specific opportunity]?

Thank you for sharing your knowledge with our community!

[Your Name]

### Mentor Resource Request

**Channel:** Direct Message

**Subject:** Opportunity to share your expertise on [Topic]

Hi [Mentor Name],

Based on recent community discussions and feedback, there's growing interest in [specific topic] that aligns perfectly with our goals.

Would you be willing to contribute in one of these ways?

- Create a short guide or template on [specific aspect]
- Host a 30-minute Q&A session
- Share a case study from your experience
- Record a quick video tip (5 minutes or less)

This would be incredibly valuable for our members who are currently struggling with [specific challenge].

Let me know if any of these options interest you, or if you have another format in mind that would work better for you.

Appreciating your consideration,

[Your Name]

## 4. Event & Activity Promotion Templates

## Event Pre-Announcement

**Channel:** Community-Wide Channel

**Subject:** Save the Date: [Event Name] - [Date]

@channel

📅 **COMING SOON:** [Event Name]

Mark your calendars for [Date] at [Time] when we'll be hosting [brief description].

This session is perfect for members interested in:

- [Benefit/Learning Outcome]
- [Benefit/Learning Outcome]
- [Benefit/Learning Outcome]

Led by [Host/Speaker] who brings [relevant experience/expertise].

Full details and registration link coming next week!

Drop a 📅 if you're interested so we can gauge attendance.

## Event Official Announcement

**Channel:** Community-Wide Channel + Direct to Interested Members

**Subject:** Registration Open: [Event Name] - [Date]

It's official! Registration is now open for our upcoming event:

📅 **[EVENT NAME]**

📅 [Date]

📅 [Time] ([Alternative Time Zone])

📅 [Platform/Location]

**What you'll gain:**

- [Specific takeaway]
- [Specific takeaway]
- [Specific takeaway]

**About our speaker:**

[Name] is [brief credential] with experience in [relevant background]. They've [notable achievement] and will be sharing pr

**Registration:**

[Clear CTA with link]

Limited to [Number] participants to ensure quality interaction!

Questions? Reply to this thread or DM me directly.

Looking forward to seeing you there!

## Event Follow-Up

**Channel:** Direct to Participants

**Subject:** Resources from [Event Name] + What's Next

Hi [Name],

Thank you for joining our [Event Name] session yesterday! I hope you found [speaker]'s insights on [topic] valuable.

As promised, here are the resources from the session:

- [Recording link]
- [Slides/documents]
- [Additional resources mentioned]

**Continue the conversation:**

The discussion on [specific point from session] is continuing in our #[channel-name]. Your perspective would be valuable th

**What did you think?**

I'd love to hear your quick feedback on the session - what was most useful? What would you like to see in future events?

**Coming up next:**

Based on interests similar to yours, you might enjoy our upcoming [related event/resource] on [date/timeframe].

Thanks again for being an engaged member of our community!

[Your Name]

## 5. Feedback Collection Templates

### Quick Pulse Check

**Channel:** Community-Wide Poll

**Subject:** Quick Check-In: How's PM Mentality Working for You?

📅

# Optimized Community Engagement Templates

I've refined these touchpoint templates to be more trackable, brief, and results-driven. Each template follows best practic

## 1. New Member Journey

### Welcome Message (Day 1)

Hi [Name],

Welcome to PM Mentality! I'm [Your Name], and I'm thrilled you've joined us.

3 quick steps to get maximum value: • Complete your profile [specific link] • Introduce yourself in #introductions • Check out our most popular resource: [specific resource]

Quick question: What's your #1 project management challenge right now? This helps me connect you with exactly what you need.

Cheers, [Your Name]

P.S. Track your welcome journey at [link] to unlock special resources

### Check-In Message (Day 3)

Hey [Name],

How's your PM Mentality experience so far? I noticed you [specific action they took/didn't take].

Would you find value in: • Our Thursday masterclass on [topic]? • Connecting with [specific member] who shares your interest in [topic]? • A quick tour of our most-used resources?

Just reply with what interests you most, and I'll make it happen.

[Your Name]

### Resource Recommendation (Day 7)

Hi [Name],

Based on your interest in [specific area], here are your personalized recommendations:

1. [Specific resource] - Members with your background saw 27% improvement in [metric]
2. Connect with [Member Name] - They've helped 12+ members overcome similar challenges

Which one should I help you access first?

[Your Name]

## 2. Re-Engagement Sequence

### Light Touch (2 Weeks Inactive)

Hi [Name],

Miss seeing you in PM Mentality! Our latest discussion on [topic] has 40+ insights that align perfectly with your interest in [their focus].

Quick question: What would make this community more valuable to you right now?

1. Different content formats?
2. More advanced discussions?
3. Something else entirely?

One quick reply helps us customize your experience.

[Your Name]

### Value Reminder (1 Month Inactive)

Hi [Name],

Since you joined PM Mentality, our members have: • Increased their PM efficiency by 23% • Secured promotions at 2x the industry rate • Built valuable professional relationships

We've just added [new resource] that addresses [specific challenge you mentioned].

Would a personalized 10-min call help reconnect you with the right resources? Choose a time: [booking link]

[Your Name]

## 3. Mentor Engagement

### Mentor Impact Check-In

Hi [Mentor Name],

Your contributions have generated 37% more engagement than average community content! Specifically, your insights on [topic] were referenced by 8 members this week.



Two opportunities to leverage your expertise:

1. A 20-min Q&A session (reaches ~40 members)
2. Contributing to our monthly resource (reaches ~150 members)

Which would you prefer to explore?

[Your Name]

## 4. Event Promotion

### Event Announcement

□ [EVENT NAME]: Transform Your [Specific PM Skill]

Join us [Date] at [Time] to master [specific skill] with [Speaker Name], who helped [company/individuals] achieve [specific result].

You'll walk away with: • [Specific actionable takeaway] • [Template or framework you can use immediately] • [Measurable outcome]

Limited to [Number] participants for maximum interaction.

Register: [Link] (Includes access to exclusive follow-up resources)

Reply "Interested" to get a calendar invite + reminder

### Event Follow-Up

Hi [Name],

Thank you for joining [Event Name]! Your question about [specific topic] sparked great discussion.

Your event resources: • [Recording link] (Available for 7 days) • [Action template mentioned] (Implement in <10 minutes) • [Bonus resource]

NEXT STEP: Join the #[specific-channel] where 12 members are already implementing these strategies.

What was your single biggest takeaway? Reply with just one sentence to help us improve future events.

[Your Name]

## 5. Feedback Collection

### Quick Impact Assessment

Hi [Name],

You've been with PM Mentality for [timeframe]. In just 2 questions, help us deliver more value:

1. On a scale of 1-10, how likely are you to recommend PM Mentality to a colleague?
2. What's one thing we could improve that would increase your rating by 2 points?

Your feedback directly shapes our next community update (launching [specific date]).

[Your Name]

### Resource Effectiveness Check

Hi [Name],

We noticed you downloaded [specific resource] [timeframe] ago.

Did it help solve your challenge with [specific issue]? • Yes - it solved my problem completely • Partially - I need more guidance on [x] • No - I'm still struggling with [x]

Just click one option above, and we'll follow up with exactly what you need next.

[Your Name]

These templates are designed for high engagement rates with clear calls to action and built-in tracking mechanisms. Each te

Would you like me to focus on any specific template type to refine further?

Great question! Measuring and calculating the effectiveness of your matching process and community engagement is crucial. H

## KEY METRICS TO MEASURE

### Match Quality Metrics

- \*\*Match Satisfaction Score\*\*: Survey both parties after matching (scale 1-5)
- \*\*Relationship Longevity\*\*: % of matches that continue beyond initial commitment
- \*\*Net Promoter Score (NPS)\*\*: Would participants recommend the program to others?
- \*\*Rematch Rate\*\*: % of participants requesting new matches

```
Engagement Metrics
- **Meeting Frequency**: Average number of meetings per month
- **Meeting Duration**: Average length of mentoring sessions
- **Communication Frequency**: Number of interactions between meetings
- **Platform Usage**: Activity levels on your community platform
- **Response Times**: How quickly members respond to communications

Outcome Metrics
- **Goal Achievement Rate**: % of participants who achieved their stated goals
- **Skill Development**: Pre/post self-assessment of targeted skills
- **Career Impact**: Promotions, role changes, or new opportunities gained
- **Knowledge Transfer**: Assessment of specific knowledge gained
- **Network Growth**: New connections made through the program
```

## ## CALCULATION METHODS

### ### Match Quality Score

Match Quality Score = (Mentor Satisfaction + Mentee Satisfaction) / 2

Where:

- Satisfaction is rated on a 1-5 scale
- Scores above 4.0 indicate strong matches
- Scores below 3.0 indicate potential issues requiring intervention

### ### Engagement Index

Engagement Index = (Meeting Frequency × 0.4) + (Response Rate × 0.3) + (Platform Activity × 0.3)

Where:

- Meeting Frequency = Actual meetings / Expected meetings
- Response Rate = % of communications receiving responses within 48 hours
- Platform Activity = User activity / Average user activity

### ### Program ROI Calculation

Program ROI = (Program Benefits - Program Costs) / Program Costs × 100

Where:

- Program Benefits = Quantified value of outcomes (skill development, retention, etc.)
- Program Costs = Technology + Administration + Training + Support

### ### Match Success Probability

Match Success Probability = (Compatibility Score × 0.5) + (Prior Success Rate × 0.3) + (Engagement Prediction × 0.2)

Where:

- Compatibility Score = % alignment on key matching factors
- Prior Success Rate = Historical success rate for similar matches
- Engagement Prediction = Likelihood of active participation based on profile data

## ## DATA COLLECTION METHODS

### ### Regular Pulse Surveys

Deploy short (1-2 minute) surveys at key intervals:

- \*\*Initial match reaction\*\*: 48 hours after introduction
- \*\*Early progress check\*\*: 2 weeks into relationship
- \*\*Mid-point assessment\*\*: Halfway through formal program
- \*\*Final evaluation\*\*: At program conclusion
- \*\*Long-term impact\*\*: 3-6 months after program ends

### ### Activity Tracking

- Set up automated tracking of platform interactions
- Record meeting frequency and duration through calendar integrations
- Track resource usage and content engagement

### ### Qualitative Data Collection

- Conduct focused interviews with a sample of participants
- Run facilitated group discussions to identify trends
- Collect open-ended feedback through prompts

Would you like me to elaborate on any specific measurement area or create a dashboard template to track these metrics?

## # Community Engagement Specialist: Strategic Brief & Agenda Templates

### ## ☐ Core KPI Dashboard

Responsibility Area	Key Performance Indicators	Current	Target	Timeline
Community Culture	• Active participation rate • Retention rate • Sentiment score	TBD	TBD	TBD
Engagement Experiments	• Experiment completion rate • Member adoption of new formats • Participation lift %	TBD		
Feedback Collection	• Response rate to surveys • Actionable insights generated • Implementation rate of suggestions			
Learning Experience	• Resource utilization • Completion rate of materials • Knowledge application success	TBD		
Community Advocacy	• Issue resolution time • New initiative adoption rate • Leadership action on recommendations			

## ## Weekly Brief Template

### ### 1. Community Pulse Check

#### \*\*Current Health Metrics:\*\*

- Active members: [#]
- Weekly engagement rate: [%]
- New member onboarding: [#]

#### \*\*Sentiment Analysis:\*\*

- Top positive feedback themes: [Bullet points]
- Areas requiring attention: [Bullet points]
- Unexpected insights: [Bullet points]

### ### 2. Experiment Tracker

#### \*\*Active Experiments:\*\*

- [Experiment Name]: [Status] | [Initial Results] | [Next Steps]
- [Experiment Name]: [Status] | [Initial Results] | [Next Steps]

#### \*\*Proposed Experiments:\*\*

- [Concept] | [Expected Impact] | [Resources Needed]
- [Concept] | [Expected Impact] | [Resources Needed]

### ### 3. Member Spotlight

#### \*\*Success Stories:\*\*

- [Member Name]: [Achievement] | [Support Provided]
- [Member Name]: [Achievement] | [Support Provided]

#### \*\*Engagement Opportunities:\*\*

- Members who could benefit from additional touchpoints: [Names]
- Potential mentor/mentee connections: [Matches]

### ### 4. Resource Utilization

#### \*\*Top Performing Content:\*\*

- [Resource Name]: [Usage Stats] | [Feedback Summary]
- [Resource Name]: [Usage Stats] | [Feedback Summary]

#### \*\*Content Gaps Identified:\*\*

- [Topic/Need]: [Source of Insight] | [Proposed Solution]
- [Topic/Need]: [Source of Insight] | [Proposed Solution]

### ### 5. Strategic Recommendations

#### \*\*Short-term Actions (Next 7 Days):\*\*

- [Action Item] | [Expected Outcome] | [Resources Needed]
- [Action Item] | [Expected Outcome] | [Resources Needed]

#### \*\*Medium-term Initiatives (Next 30 Days):\*\*

- [Initiative] | [Goal] | [Success Metrics]
- [Initiative] | [Goal] | [Success Metrics]

## ## Monthly Strategy Meeting Agenda

### ### 1. Performance Review (20 min)

#### \*\*KPI Dashboard Review:\*\*

- Month-over-month trends
- Wins to celebrate
- Areas needing improvement

#### \*\*Member Journey Analysis:\*\*

- Onboarding effectiveness
- Engagement patterns
- Retention challenges

### ### 2. Voice of the Community (25 min)

#### \*\*Feedback Synthesis:\*\*

- Key themes from formal feedback channels
- Insights from informal conversations
- Emerging needs and expectations

#### \*\*Critical Issues:\*\*

- Blockers impacting member experience
- Resource constraints
- Process inefficiencies

### ### 3. Experimental Learning (20 min)

#### \*\*Experiment Results:\*\*

- What worked and why
- What didn't work and lessons learned
- ROI analysis of time/resources invested

#### \*\*Proposed Experiments:\*\*

- New concepts based on community feedback
- Resource requirements and timeline
- Expected outcomes and success metrics

### ### 4. Content Strategy (15 min)

#### \*\*Content Performance:\*\*

- Most/least utilized resources

- Format effectiveness
- Accessibility audit results

**\*\*Content Roadmap:\*\***

- Planned new resources
- Updates to existing materials
- Archiving recommendations

### 5. Cross-functional Alignment (15 min)

**\*\*Team Collaboration Opportunities:\*\***

- Where community insights can inform other team initiatives
- Required support from other departments
- Shared goals and metrics

### 6. Action Planning (25 min)

**\*\*Prioritization Matrix:\*\***

- High impact / Low effort initiatives
- Strategic long-term investments
- Quick wins for immediate implementation

**\*\*Responsibility Assignment:\*\***

- Specific owners for each initiative
- Resource allocation
- Timeline commitments

**## Quarterly Leadership Briefing Template**

### 1. Community Health Summary

**\*\*Trend Analysis:\*\***

- Quarter-over-quarter engagement metrics
- Retention analysis
- Growth indicators

**\*\*ROI Demonstration:\*\***

- Community impact on organizational goals
- Resource utilization efficiency
- Value creation examples

### 2. Strategic Impact Assessment

**\*\*Success Stories:\*\***

- Notable member achievements
- Community-driven innovations
- Testimonials and social proof

**\*\*Challenge Identification:\*\***

- Systemic issues requiring leadership attention
- Resource gaps
- Strategic misalignments

### 3. Forward-Looking Plan

**\*\*Strategic Priorities:\*\***

- Focus areas for next quarter
- Resource requirements
- Expected outcomes

**\*\*Innovation Pipeline:\*\***

- New initiatives in development
- Testing approach
- Scaling strategy

### 4. Executive Decision Requests

**\*\*Approval Items:\*\***

- Budget adjustments
- Policy changes
- Resource allocation shifts

**\*\*Strategic Guidance:\*\***

- Areas where leadership direction is needed
- Options analysis
- Recommendations with rationale

**# Community Engagement Experiment Plan**

**## Experiment Overview**

**\*\*Experiment Name:\*\*** [Clear, descriptive name]

**\*\*Experiment Owner:\*\*** [Your Name]

**\*\*Duration:\*\*** [Start Date] to [End Date] \*(typical experiments run 2-4 weeks)\*

**\*\*Experiment Type:\*\***

- [ ] New Format Test
- [ ] Engagement Tactic
- [ ] Gamification Element
- [ ] Content Strategy
- [ ] Onboarding Enhancement
- [ ] Other: \_\_\_\_\_

**## Problem Statement**

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Current Situation:
[Describe the current state - be specific about the metric or behavior you're trying to improve]

Evidence of Problem:
- [Quantitative data point]
- [Qualitative feedback]
- [Observation]

Impact on Community:
[How this problem affects member experience or program goals]

Experiment Hypothesis

If we [implement specific change], **then** [expected outcome] **because** [reasoning].

Success Metrics

Primary Metric:
[The ONE metric that will determine success]

Current Baseline: [Current value of primary metric]

Target Improvement: [Specific number or percentage increase/decrease]

Secondary Metrics:
- [Additional metric to watch]
- [Additional metric to watch]

Implementation Plan

Phase 1: Preparation (Timeline: [Dates])

Resources Needed:
- [Platform/tool]
- [Team support]
- [Content requirements]

Setup Steps:
1. [Specific action]
2. [Specific action]
3. [Specific action]

Phase 2: Launch (Timeline: [Dates])

Rollout Approach:
- [] Full community implementation
- [] A/B test with segment
- [] Opt-in participation
- [] Targeted to specific member segment: [Define segment]

Launch Announcement:
[How will you communicate this to the community?]

Launch Checklist:
- [] [Task]
- [] [Task]
- [] [Task]

Phase 3: Monitoring (Timeline: [Dates])

Data Collection Plan:
- [What data will you gather]
- [How will you gather it]
- [When will you check in]

Adjustment Triggers:
- IF [situation occurs], THEN [response action]
- IF [situation occurs], THEN [response action]

Risk Assessment

Potential Risks:
- [Risk]: [Mitigation plan]
- [Risk]: [Mitigation plan]
- [Risk]: [Mitigation plan]

Early Termination Criteria:
- [Condition that would cause you to end the experiment early]

Results & Next Steps

(To be completed after experiment)

Results Summary:
- Primary Metric Result: [Value] ([% change] from baseline)
- Key Observations:
 - [Observation]
 - [Observation]

Lessons Learned:
- [Insight]
- [Insight]

Recommendation:
- [] Implement permanently
- [] Adjust and re-test
- [] Discontinue

```

- [ ] Other: \_\_\_\_\_

**\*\*Next Steps:\*\***

1. [Action]
2. [Action]
3. [Action]

Alright, let's make this **\*\*specific\*\*** and **\*\*optimized\*\*** for mentors. ☐

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### **\*\*Framework for Attracting Mentor Personas with Your Brand & Community Voice\*\***

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### **\*\*Step 1: Understand Mentor Needs & Desires (The Real Talk)\*\***

Mentors are **\*\*busy\*\***. They're usually established, sought-after, and possibly tired of answering the same dumb questions. Y

#### **Questions to Ask:**

- **\*\*What do mentors want?\*\***
  - They're after **\*\*meaningful conversations\*\*** and **\*\*growth opportunities\*\***, not just "likes" and "thumbs up."
  - They want to engage with **\*\*purpose-driven individuals\*\*** and communities. If they see potential and ambition in your bra
- **\*\*What problems are you solving for them?\*\***
  - Maybe they want to pass on their knowledge and skills to the next generation, but only if they see the **\*\*passion and in**
  - Are you providing them with **\*\*valuable content\*\*** that helps them stay at the top of their game? Are you offering **\*\*insi**

Focus on **\*\*empowerment, growth, and challenge\*\***. This is what mentors thrive on.

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### **\*\*Step 2: Define Your Brand's Purpose as a Magnet for Mentors\*\***

Mentors will flock to brands that align with their **\*\*personal values\*\*** and **\*\*growth-oriented missions\*\***. Don't just talk ab

#### **Key Considerations:**

- **\*\*Mentor-Focused Purpose\*\***: What is your community's **\*\*bigger mission\*\*** that resonates with **\*\*leaders and mentors\*\***? Do y
  - Example: "We help passionate professionals who want to become better leaders by connecting with people who have been th
- **\*\*Mentor Alignment\*\***: Are you in a space that **\*\*mentors respect\*\***? Think: education, entrepreneurship, leadership, develo

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### **\*\*Step 3: Craft a Voice that Appeals to Mentors—Professional Yet Relatable\*\***

Mentors want to feel like they're engaging with a brand that **\*\*values\*\*** their time and wisdom. They want to be respected, \*

#### **Voice Characteristics to Adopt:**

- **\*\*Professional, but not stuffy\*\***: Mentors don't want to feel like they're being lectured or talked down to. Keep it **\*\*aut**
- **\*\*Challenge and Inspire\*\***: Don't just praise the mentor's advice—actively **\*\*ask for\*\*** it and **\*\*value their experience\*\***.
  - Example: "We're curious, @mentor\_name—how would you approach this challenge?" Or, "Your thoughts on this, @mentor\_name,
- **\*\*Supportive\*\***: Always support their contributions and frame the community as a **\*\*collaborative space\*\***. Make them feel l 1

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### **\*\*Step 4: Create Conversations that Attract Mentors\*\***

Mentors want to engage, but they don't want to waste time in **\*\*shallow interactions\*\***. Your discussions need to be **\*\*high-c**

#### **What Should You Discuss?**

- **\*\*Advanced Topics\*\***: Mentors love to talk about what they've learned over the years. Craft conversations around **\*\*real-wo**
  - Example: "What's the biggest lesson you've learned in your career that most people overlook?"
- **\*\*Open-Ended Challenges\*\***: Don't be afraid to **\*\*ask them to share wisdom\*\***. Use **\*\*thought-provoking\*\*** questions that requ
  - Example: "In your opinion, what's the best way to prepare for failure, and how can young professionals bounce back from
- **\*\*Ask for Mentorship\*\***: Yes, straight-up ask for it, but with **\*\*respect\*\***. Frame it as an opportunity for them to pass on
  - Example: "We'd be honored if you could share your perspective on [topic]. What advice would you give someone starting o

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### **\*\*Step 5: Content That Resonates with Mentors\*\***

Your **\*\*content\*\*** isn't just for engagement—it's a powerful tool to **\*\*attract\*\*** mentors. You need to create content that spe

#### **Content Ideas:**

- **\*\*Mentor Spotlights\*\***: Feature mentors in the community. Ask for their advice and insights. This **\*\*highlights\*\*** their exp
  - Example: "We were lucky enough to chat with @mentor\_name about how they navigated the toughest challenges in their care
- **\*\*Thought Leadership Articles\*\***: Post deep dives into areas where mentors can contribute their knowledge and experience.
  - Example: "We're discussing the future of leadership development. Here's where we think it's headed. What are your thoug
- **\*\*Q&A Sessions with Mentors\*\***: Host Q&A sessions where mentors can answer the community's burning questions. This gives t

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### **\*\*Step 6: Make Engagement Effortless and Rewarding\*\***

Mentors are busy, so don't expect them to just pop in for a chat without a **\*\*reward\*\***. If you want to keep them engaged, yo

#### **Ways to Engage:**

- **\*\*Mentor-Exclusive Spaces\*\***: Create a **\*\*special section\*\*** in your community where mentors can discuss ideas, share resour

- **Recognition**: Publicly recognize **mentors' contributions**. Give them **credits** for sharing their expertise, whether

- **Collaborative Content Creation**: Don't just ask them for advice—ask them to **collaborate** on content like blog posts

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### **Step 7: Keep Iterating and Refining**

Finally, mentors aren't going to stick around for the long term if they don't feel their contributions are valued. You've got

#### What to Track:

- **Engagement Levels**: Are mentors actively engaging in discussions? Are they contributing ideas, or do they just pop in
- **Content Performance**: Are the posts where you tag mentors getting more attention? Do their responses lead to deeper discussions?
- **Feedback**: Ask mentors for feedback. Be open to their suggestions for how the community can improve.

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### **In Conclusion**

To attract **mentor personas**, you need to:

1. **Understand their motivations** (value growth, meaningful interactions, leadership).
2. Create a **professional yet approachable voice**.
3. Foster **high-level discussions** that challenge and inspire.
4. Produce **content** that resonates with their expertise and allows them to shine.
5. **Respect their time** by offering meaningful recognition and opportunities for engagement.

**Bonus Tip**: Make sure you're consistent! Mentors are busy and will bounce if they don't see **continuous** high-quality

Now, go get yourself a mentor, and stop wasting my time. ☺

Alright, alright, time to get your mind into **mentor mode**. You wanna understand what makes them tick? Alright, let's break

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### **1. Value Growth**

Mentors want to feel like they're **growing** personally and **professionally**. It's not just about **passing on knowledge**

#### Why Does This Matter?

- **Growth = Relevance**: Mentors want to stay relevant. They're constantly looking for new ways to improve their skills, products
- **Legacy and Impact**: They want to leave a **lasting legacy**, which is why they seek **value growth**—not just in themselves

#### How to Tap Into This?

- **Provide Learning Opportunities**: Create spaces in your community where mentors can also be **challenged**. Give them **challenges**
- **Content That Pushes Boundaries**: Share thought-provoking content that challenges their current thinking. For example, **thought-provoking content**

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### **2. Meaningful Interactions**

Mentors don't want to be **background noise** or just **answers on demand**. They want **authentic conversations** with people

#### Why Does This Matter?

- **Impact Over Quantity**: A mentor wants fewer but **higher quality** interactions that feel **purposeful**. They want to **make an impact**
- **Recognition**: They want to know they're making a **difference**. Meaningful interactions show them that their time and expertise are valued

#### How to Tap Into This?

- **Ask Deep Questions**: Engage them with questions that require thoughtful, reflective answers. Don't settle for "What's your opinion?"
- **Real Conversations, Not Just Soundbites**: Instead of treating mentors like **answer machines**, engage them in **conversations**

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### **3. Leadership**

Mentors are, by nature, **leaders**. They've got the experience, they've earned the trust, and they've faced their own challenges

#### Why Does This Matter?

- **The Power of Influence**: They're not just teaching—they're shaping the future. They want to **empower others** to lead
- **Self-Reflection and Accountability**: By mentoring, they're **reinforcing their own leadership**. They're constantly learning

#### How to Tap Into This?

- **Encourage Leadership Development**: Your community should emphasize **leadership skills**. Create content or spaces for **leadership development**
- **Mentorship as a Two-Way Street**: Allow mentors to feel like they're **developing** as much as the people they mentor.

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### In Summary, Here's What You Need to Know:

1. **Value Growth**: Mentors are looking for **personal and professional growth**—they want to feel like they're **constantly growing**
2. **Meaningful Interactions**: They crave **authentic, high-quality interactions**. It's not about quantity—it's about **quality**
3. **Leadership**: Mentors are **natural leaders**, and they want to be **empowered** and respected. They're interested in **leadership opportunities**

To craft a more professional yet approachable tone for your **Community Onboarding Kit**, here's how we can adjust the overall

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### ☐ **Key Voice Tweaks to Apply Throughout**

1. **Professional**
  - Clear, concise language with structured headers and bullet points.
  - Use active voice and action-oriented phrasing.
  - Tone is confident but not overhyped.
2. **Approachable**
  - Keep the fun elements (like emojis and playful headers), but balance them with clarity and purpose.
  - Soften aggressive humor—keep it quirky and upbeat instead of snarky or chaotic.
  - Use friendly, inclusive language like "you'll find," "we recommend," "feel free to."

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### ### □ Example Refinement

#### #### Original:

> Why? Because it locks in behavior, habit, and checklist dopamine fast. That onboarding flow needs to run like it's on rails

#### #### Refined:

> Why? Because it builds momentum, habits, and early wins. Think of it as an onboarding flow on rails—with a little sparkle

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#### #### Original:

> - Ensure checklist progress: 50% completion target

> - Add to "Who's New" Coda view or Slack thread

> - Assign light engagement challenge: post or comment in #random or #your-journey

#### #### Refined:

> - Target 50% checklist completion within the first 72 hours

> - Highlight the member in the "Who's New" section on Coda or Slack

> - Invite them to join a light engagement challenge (e.g. post in #random or #your-journey)

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If you'd like, I can go through the whole document and rewrite the tone consistently to hit this balance of pro + approachable

To **foster high-level discussions that challenge and inspire**, we can enhance the onboarding process with intentional pro

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### ## □ Level-Up Discussions: Thought Leader Sparks

> For the bold brains who joined to **build** something — not just vibe in the corner.

#### ### □ Goals:

- Surface ambitious ideas early
- Create space for constructive friction
- Empower new members to contribute meaningfully, fast

#### ### □ Implementation Plan:

##### 1. **Weekly Power Prompt (Slack Thread or Coda Embed)**

Drop a high-voltage question like:

- **"What's one sacred PM ritual you think is actually BS — and why?"**
- **"If you had unlimited budget and zero stakeholders, what community experiment would you launch tomorrow?"**
- **"What's one 'unpopular truth' about leadership that you've learned the hard way?"**

##### 2. **Curated Micro-Forums (Opt-In)**

Auto-tag newcomers by interest (via onboarding form or intro post) and invite them to:

- **Mini-Think Tanks** (small group DM or private thread): Rotate topics weekly
- **Lightning Rants Sessions** (15-min calls): Everyone gets 3 minutes to provoke the room

##### 3. **High-Stakes Hot Seat**

After week 1, invite standout members to:

- Present a controversial opinion or idea
- Get rapid-fire feedback (with emoji-only reactions, live thread)

##### 4. **Badge Incentives: "Contrarian Catalyst" / "Deep Diver" / "Idea Grenadier"**

Award badges for:

- Challenging a popular opinion (respectfully)
- Sparking a 20+ comment thread
- Offering a solution nobody saw coming

##### 5. **"Mentor vs Mentee Debate Nights" (Quarterly)**

Have newbies and mentors go head-to-head on spicy topics.

Example debate: **"Agile is just waterfall in disguise with a fancier hat."**

To produce content that resonates with their expertise and allows them to shine, here's what I'd add or adjust in your **Co**

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### ### □ ADD: "Shine Zone" Section (New Members' Brag Board)

#### #### □ Why?

Turn the spotlight on them early. Recognition creates retention. It also filters high-signal talent straight into the core

#### #### □ Section Title: "Brag Bites: Show Off Your Spark"

Add to Stage 3 or Bonus section.

#### **\*\*Instructions for new members:\*\***

> "Drop 1 screenshot, link, or voice memo that shows off something you're proud of—big or small. Did you run a killer retro

Then add a running thread or Coda view with:

- □ Name
- □ Brag Bite
- □ Peer Shoutouts
- □ Tag: Skill or Theme ("Product Ops," "Meeting Magic," "Unicorn PM")

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### ### □ ADJUST: Feedback Form Prompts to Let Them Flex



**\*\*Current Goal:\*\*** Get 1 qualitative feedback point per new member.

**\*\*Update the form to include "Let Us Brag About You" prompts:\*\***

- "What's something weirdly specific you're amazing at?"
- "What should people come to you for?"
- "What's one challenge you've crushed that others might struggle with?"

Then you can:

- Surface this in onboarding highlights
- Auto-mention them in relevant future convos (via Slack bots or Coda triggers)

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### ☐ INSERT: "Mentor Spotlight Moments" in Slack

Encourage mentors to post short "Mentor Spotlights" where they praise something *\*specific\** about their mentee publicly after

Example format:

> ☐ **\*\*Mentor Spotlight: [@Name]\*\***

> This week's dopamine injection: [Thing they did]. ☐ You better keep an eye on this one. ☐

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Let me know if you want me to add these into the doc for you or push them as separate templates you can plug into Slack workflow

I'll expand with additional templates for more mentoring contexts as well as some communication post templates:

## NONPROFIT LEADERSHIP MENTORING

### Social Impact Leadership Program

### 1. MISSION FOCUS

- o What social issues is your work addressing?
- o What is your organization's current size and scope?
- o What is your vision for scaling your impact?

### 2. RESOURCE MANAGEMENT

- o What funding models are you currently using?
- o What stakeholders are you accountable to?
- o What resource challenges are you currently facing?

### 3. LEADERSHIP NEEDS

- o How do you balance mission fulfillment with sustainability?
- o What governance structures are you working within?
- o What partnerships are crucial to your success?

### 4. MENTOR ALIGNMENT

- o Would you benefit more from a mentor with nonprofit expertise or corporate crossover experience?
- o Are you seeking strategic guidance or operational insights?
- o What specific skills gap are you looking to address through mentorship?

## CAREER TRANSITION MENTORING

### Professional Pivot Program

### 1. TRANSITION DETAILS

- o What industry/role are you transitioning from?
- o What industry/role are you aiming to enter?
- o What is your timeline for making this change?

### 2. TRANSFERABLE SKILLS

- o What skills from your background are relevant to your target field?
- o What new skills do you need to develop?
- o What credentials or qualifications might you need?

### 3. NETWORK STATUS

- o What connections do you currently have in your target field?
- o What industry-specific knowledge gaps do you have?
- o What insider perspectives would be most valuable?

### 4. TRANSITION CHALLENGES

- o What specific barriers have you encountered in your transition?
- o What aspects of the change feel most uncertain?
- o What support systems do you currently have in place?

## VETERANS MENTORING

### Military-to-Civilian Transition Program

## 1. SERVICE BACKGROUND

- What branch and role did you serve in?
- What leadership experiences did you have during service?
- What technical skills did you develop in the military?

## 2. CIVILIAN GOALS

- What industry or role are you targeting?
- What timeframe are you working with for your transition?
- What aspects of civilian workplace culture are you adjusting to?

## 3. TRANSLATION CHALLENGES

- How effectively can you communicate your military experience to civilian employers?
- What parts of your service experience seem most valuable in civilian contexts?
- What military skills or experiences have been challenging to translate?

## 4. MENTORSHIP NEEDS

- Would you prefer a mentor with military background or civilian-only experience?
- What specific guidance would be most valuable? (Job search, culture adjustment, skills development)
- What support networks are you currently connected to?

## MENTORSHIP COMMUNICATION TEMPLATES

### Program Announcement Post

### □ LAUNCHING: [PROGRAM NAME] MENTORSHIP PROGRAM

We're excited to announce our new mentorship initiative designed to [primary program goal]. Whether you're looking to share your expertise or accelerate your growth, this program offers structured support for meaningful professional connections.

□ AS A MENTOR, YOU'LL: • Share your valuable insights and experience • Develop your leadership and coaching abilities • Expand your professional network • Make a meaningful impact on someone's career journey

□ AS A MENTEE, YOU'LL: • Gain personalized guidance aligned with your goals • Develop new skills and perspectives • Navigate challenges with experienced support • Build valuable professional relationships

□ HOW TO APPLY: Complete our matching survey by [DATE] at [LINK] Program runs from [START DATE] to [END DATE] Expected commitment: [TIME COMMITMENT]

Questions? Contact [PROGRAM COORDINATOR] at [CONTACT INFO]

### Mentor Welcome Email

Subject: Welcome to the [PROGRAM NAME] Mentorship Program!

Dear [MENTOR NAME],

Thank you for volunteering your time and expertise as a mentor in our [PROGRAM NAME] program! Your willingness to guide others speaks volumes about your character and commitment to our community.

Based on our carefully designed matching process, we've paired you with [MENTEE NAME], who is [brief mentee description]. We believe this match offers great potential for both of you based on [specific alignment points].

NEXT STEPS:

1. Review your mentee's profile in the attached document
2. Schedule your first meeting using the calendar link below (aim for within the next 2 weeks)
3. Complete the short "First Meeting Reflection" form afterward

RESOURCES: • Mentorship Handbook: [LINK] • Meeting Agenda Templates: [LINK] • Program Timeline: [LINK] • Support Contact: [CONTACT INFO]

Remember, successful mentorship relationships balance structure with flexibility. We recommend setting clear expectations in your first meeting while remaining adaptable to your mentee's evolving needs.

We're here to support you throughout this journey. Please don't hesitate to reach out with any questions or concerns.

Warm regards, [PROGRAM COORDINATOR]

### Mentee Welcome Email

Subject: You've Been Matched! Welcome to the [PROGRAM NAME] Mentorship Program

Dear [MENTEE NAME],

Congratulations! We're excited to welcome you to the [PROGRAM NAME] mentorship program. After careful consideration of your goals and preferences, we've matched you with [MENTOR NAME], who brings [brief mentor description].

We believe [MENTOR NAME]'s experience in [relevant area] aligns well with your interest in [mentee's goal], making this a promising partnership for your professional development.

#### GETTING STARTED:

1. Review your mentor's profile in the attached document
2. Your mentor will reach out to schedule your first meeting within the next two weeks
3. Before your first meeting, please complete the "Mentorship Goals Worksheet" at [LINK]

PROGRAM DETAILS: • Duration: [TIMEFRAME] • Expected meeting frequency: [FREQUENCY] • Key program milestones: [BRIEF LIST]

MAKING THE MOST OF MENTORSHIP: • Come prepared to each meeting with specific questions or topics • Be open to feedback and new perspectives • Take initiative in scheduling and following up • Respect your mentor's time by being punctual and prepared

If you have any questions or need support at any point, please contact [PROGRAM COORDINATOR] at [CONTACT INFO].

We're excited to see how this mentorship journey unfolds for you!

Best regards, [PROGRAM COORDINATOR]

#### ### Mid-Program Check-in Survey

#### MENTORSHIP PROGRESS CHECK-IN

##### 1. RELATIONSHIP QUALITY

- How would you rate the quality of your mentoring relationship? (1-5)
- What aspects of the relationship are working well?
- What aspects could be improved?

##### 2. PROGRESS ASSESSMENT

- What progress have you made toward your original goals?
- Have your goals evolved since the program began?
- Are you encountering any obstacles to progress?

##### 3. COMMUNICATION EFFECTIVENESS

- How effectively are you communicating with your mentor/mentee?
- Is the frequency of meetings adequate?
- Are there any communication challenges to address?

##### 4. SUPPORT NEEDS

- What additional resources would help you succeed in this relationship?
- Is there any intervention needed from program administrators?
- What could the program provide to enhance your experience?

##### 5. LOOKING AHEAD

- What specific goals do you have for the remainder of the program?
- Are there any adjustments needed to your mentorship agreement?
- What would make the conclusion of this mentorship successful for you?

#### ### Success Story Template

#### ☐ MENTORSHIP SUCCESS SPOTLIGHT ☐

MEET THE PAIR: [Mentor Name], [Mentor Title/Background] [Mentee Name], [Mentee Title/Background]

THE CHALLENGE: When [Mentee] joined the mentorship program, they were facing [specific challenge or goal]. They needed guidance on [specific area] to help them [desired outcome].

THE APPROACH: Working together, [Mentor] and [Mentee] focused on: • [Specific strategy or approach #1] • [Specific strategy or approach #2] • [Specific strategy or approach #3]

THE BREAKTHROUGH: After [timeframe] of consistent work, [Mentee] achieved [specific outcome or milestone]. According to [Mentee], "[Quote about the impact of mentorship]."

[Mentor] reflects: "[Quote about what was rewarding about the mentorship]"

KEY LESSONS: • [Insight or lesson learned] • [Insight or lesson learned] • [Insight or lesson learned]

WHAT'S NEXT: [Mentee] is now [next steps or future goals]. [Optional: How the mentorship relationship will continue]

Inspired by this story? Learn more about our mentorship program: [LINK]

Is there any specific industry or mentoring context you'd like me to create more templates for? Or would you like me to dev

#### ## COMMUNITY ENGAGEMENT TEMPLATES

#### ### Community Member Profile Survey

## GETTING TO KNOW OUR COMMUNITY

### 1. COMMUNITY CONNECTION

- How did you first discover our community?
- How long have you been a member?
- What initially drew you to participate?

### 2. PARTICIPATION PATTERNS

- How do you typically engage with our community? (Select all that apply) ☐ Attend events ☐ Participate in discussions ☐ Share resources/content ☐ Mentor others ☐ Learn from others ☐ Connect with specific members
- What times/days are you most likely to engage?
- What barriers prevent you from participating more actively?

### 3. VALUE & MOTIVATION

- What value do you gain from this community?
- What keeps you coming back?
- What would make this community even more valuable to you?

### 4. CONTRIBUTION POTENTIAL

- What expertise or perspective could you share with others?
- Would you be interested in taking a more active role? How?
- What would make it easier for you to contribute?

### 5. PERSONAL CONNECTION

- What do you do professionally?
- What are you passionate about outside of work?
- What's something about you that might surprise others?

### Community Event Feedback Form

## EVENT REFLECTION

### 1. EXPERIENCE RATING

- Overall, how would you rate this event? (1-5 stars)
- How relevant was the content to your needs/interests? (1-5)
- How engaging was the format? (1-5)

### 2. HIGHLIGHTS & IMPROVEMENTS

- What was the most valuable aspect of this event for you?
- What could have made this event more valuable?
- Was there anything missing that you hoped would be included?

### 3. CONNECTIONS MADE

- Did you connect with new community members? (Yes/No)
- How meaningful were these connections? (1-5)
- Would you like support in following up with anyone you met?

### 4. FOLLOW-UP INTERESTS

- What topics would you like to explore further?
- Would you be interested in leading a discussion on a related topic?
- What resources would help you implement what you learned?

### 5. PERSONAL IMPACT

- How will you apply what you experienced today?
- Has this event changed your perspective in any way?
- What's one action you'll take as a result of attending?

## USER DISCOVERY TEMPLATES

### Deep Dive User Interview Guide

## USER DISCOVERY CONVERSATION

### INTRODUCTION (5 MIN)

- Thank you for taking the time to speak with me today
- This conversation will help us understand your needs better
- There are no right or wrong answers – we value your honest thoughts
- Do you mind if I record our conversation for note-taking purposes?

### BACKGROUND & CONTEXT (10 MIN)

- Tell me a bit about yourself and your role
- Walk me through a typical day in your life
- What are the biggest challenges you face in your role?
- How do you currently solve these challenges?

#### PROBLEM EXPLORATION (15 MIN)

- When was the last time you encountered [specific problem]?
- Can you walk me through that experience step by step?
- What was most frustrating about that situation?
- How did you feel during this process?
- What solutions have you tried before?
- What worked well? What didn't work?

#### CURRENT SOLUTIONS (15 MIN)

- What tools or methods do you currently use?
- How did you discover these solutions?
- What do you like most about your current approach?
- If you could magically improve one thing, what would it be?
- Have you considered alternatives? Why or why not?

#### NEEDS & DESIRES (10 MIN)

- If you had a perfect solution, what would it do for you?
- How would you measure whether a new solution is successful?
- What would make you excited to try something new?
- What concerns would you have about adopting a new approach?

#### WRAP-UP (5 MIN)

- Is there anything else you think I should know?
- Would you be open to testing potential solutions in the future?
- Do you know anyone else who might have valuable insights on this?
- Thank you for your time and insights

### User Journey Observation Guide

### CONTEXTUAL INQUIRY FRAMEWORK

#### SETUP & PERMISSION

- Request to observe user in their natural environment
- Explain you'll be taking notes but won't interrupt their process
- Ask them to narrate their thoughts as they work (think-aloud protocol)

#### OBSERVATION FOCUS AREAS ☐ Physical Environment

- How is their workspace arranged?
- What tools/resources are within reach?
- What environmental factors impact their work?

#### ☐ Process Flow

- What steps do they take to accomplish goals?
- Where do they pause or hesitate?
- What shortcuts or workarounds do they use?
- What triggers them to shift between tasks?

#### ☐ Pain Points

- When do they show signs of frustration?
- What tasks take longer than expected?
- Where do errors or confusion occur?
- What problems do they encounter but not mention?

#### ☐ Social Interactions

- Who do they collaborate with?
- How do they seek help or information?
- How do they share their work with others?

#### ☐ Tools & Resources

- What applications/tools do they use?
- How do they transition between different tools?
- What information do they reference repeatedly?

#### FOLLOW-UP QUESTIONS

- "I noticed you [specific behavior]. Can you tell me more about why you did that?"
- "That seemed to take longer than you expected. Is that typical?"
- "You looked unsure there. What were you thinking at that moment?"

- "How did you learn to do it that way?"
- "If you could change anything about this process, what would it be?"

## ## PERSONAL CONNECTION TEMPLATES

### ### Personal Values & Motivation Explorer

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##### 1. PERSONAL JOURNEY

- What path led you to where you are today?
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- What's a challenge you've overcome that you're proud of?

##### 2. VALUES & MOTIVATIONS

- What matters most to you in your work?
- What gets you excited to start your day?
- When do you feel most fulfilled or in flow?
- What problem in the world would you most like to solve?

##### 3. ASPIRATIONS & DREAMS

- Where do you hope to be in 5 years?
- What's something you've always wanted to learn or try?
- What impact do you hope to have in your field or community?
- What does success look like to you personally?

##### 4. LIFESTYLE & PREFERENCES

- How do you recharge outside of work?
- What's a perfect day look like for you?
- Who or what inspires you?
- What environments help you do your best work?

##### 5. CONNECTION POINTS

- What topics could you talk about for hours?
- What communities or groups are you part of?
- How do you prefer to build relationships with others?
- What makes you feel genuinely appreciated?

### ### Empathy Building Activity

#### PERSPECTIVE SHARING EXERCISE

This exercise helps build deeper connections by exploring shared and divergent perspectives. Complete these prompts individually, then discuss together.

##### PART 1: EXPERIENCES THAT SHAPED YOU

- Share a challenge you've faced that others might not know about
- Describe a moment when you felt truly understood
- Recall a time when your perspective dramatically changed
- What's a life experience that gives you unique insight?

##### PART 2: VALUES & PRINCIPLES

- What three principles guide your decisions?
- What's something you believe that most people disagree with?
- What do you think is often misunderstood about you?
- What would you stand up for, even at personal cost?

##### PART 3: HOPES & FEARS

- What's one goal that excites you right now?
- What's one concern keeping you up at night?
- What change are you currently navigating?
- What support would make the biggest difference for you?

##### PART 4: FINDING COMMON GROUND

- What similarities have you discovered during this conversation?
- What differences provide valuable perspective?
- How might we leverage our diverse viewpoints?
- What's one way we could support each other going forward?

## ## RELATIONSHIP LEVERAGING TEMPLATES

### ### Existing Relationship Enrichment Survey

## DEEPENING OUR PARTNERSHIP

### 1. RELATIONSHIP ASSESSMENT

- How would you describe our current relationship? (Multiple choice) ☐ New acquaintances ☐ Working relationship ☐ Established partnership ☐ Deep collaboration ☐ Other: \_\_\_\_\_
- What aspects of our relationship work particularly well?
- What aspects could be strengthened?

### 2. VALUE EXCHANGE

- What value have you gained from our relationship so far?
- What additional value could we provide?
- What value do you bring that might be underutilized?
- How might we create more mutual benefit?

### 3. COMMUNICATION PREFERENCES

- How do you prefer to communicate? (Rank options)
- What frequency of communication works best for you?
- How do you prefer to receive updates or information?
- What communication challenges have you experienced with us?

### 4. FUTURE POSSIBILITIES

- What new opportunities might we explore together?
- What goals do you have that we might support?
- What resources or connections could we share?
- How might our relationship evolve over the next year?

### 5. PERSONAL CONNECTION

- What would help you feel more connected to our team/community?
- What's something we should know about you that we might not?
- What shared interests might strengthen our connection?

### Network Mapping Workshop Template

## RELATIONSHIP ECOSYSTEM MAPPING

### STEP 1: IDENTIFY KEY RELATIONSHIPS

- List your most important professional relationships
- For each relationship, note:
  - How long you've known each other
  - The nature of your connection
  - The strength of your relationship (1-5)
  - Key mutual interests or values
  - Recent interactions

### STEP 2: VISUALIZE YOUR NETWORK

- Create a visual map with yourself at the center
- Position contacts based on:
  - Proximity = relationship strength
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- Draw connections between contacts who know each other
- Identify clusters and isolated relationships

### STEP 3: ASSESS VALUE FLOWS

- For each relationship, identify:
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### STEP 4: IDENTIFY OPPORTUNITIES

- Which relationships would benefit from renewal?
- Where are there potential introductions to make?
- Which relationships could be elevated to partnerships?
- What relationship gaps exist in your network?

### STEP 5: CREATE ACTION PLAN

- Select 3-5 priority relationships to nurture
- For each, define:
  - A specific next action
  - A meaningful way to provide value
  - A timeline for engagement

- A desired outcome

Would you like me to create any additional templates focused on specific aspects of building user relationships or community?

Here are templates designed specifically for community engagement, leveraging existing relationships, user discovery, and building a strong community.

## ## COMMUNITY ENGAGEMENT TEMPLATES

### ### Community Member Profile Survey

#### GETTING TO KNOW OUR COMMUNITY

##### 1. COMMUNITY CONNECTION

- How did you first discover our community?
- How long have you been a member?
- What initially drew you to participate?

##### 2. PARTICIPATION PATTERNS

- How do you typically engage with our community? (Select all that apply) ☐ Attend events ☐ Participate in discussions ☐ Share resources/content ☐ Mentor others ☐ Learn from others ☐ Connect with specific members
- What times/days are you most likely to engage?
- What barriers prevent you from participating more actively?

##### 3. VALUE & MOTIVATION

- What value do you gain from this community?
- What keeps you coming back?
- What would make this community even more valuable to you?

##### 4. CONTRIBUTION POTENTIAL

- What expertise or perspective could you share with others?
- Would you be interested in taking a more active role? How?
- What would make it easier for you to contribute?

##### 5. PERSONAL CONNECTION

- What do you do professionally?
- What are you passionate about outside of work?
- What's something about you that might surprise others?

### ### Community Event Feedback Form

#### EVENT REFLECTION

##### 1. EXPERIENCE RATING

- Overall, how would you rate this event? (1-5 stars)
- How relevant was the content to your needs/interests? (1-5)
- How engaging was the format? (1-5)

##### 2. HIGHLIGHTS & IMPROVEMENTS

- What was the most valuable aspect of this event for you?
- What could have made this event more valuable?
- Was there anything missing that you hoped would be included?

##### 3. CONNECTIONS MADE

- Did you connect with new community members? (Yes/No)
- How meaningful were these connections? (1-5)
- Would you like support in following up with anyone you met?

##### 4. FOLLOW-UP INTERESTS

- What topics would you like to explore further?
- Would you be interested in leading a discussion on a related topic?
- What resources would help you implement what you learned?

##### 5. PERSONAL IMPACT

- How will you apply what you experienced today?
- Has this event changed your perspective in any way?
- What's one action you'll take as a result of attending?

## ## USER DISCOVERY TEMPLATES

### ### Deep Dive User Interview Guide



## USER DISCOVERY CONVERSATION

### INTRODUCTION (5 MIN)

- Thank you for taking the time to speak with me today
- This conversation will help us understand your needs better
- There are no right or wrong answers – we value your honest thoughts
- Do you mind if I record our conversation for note-taking purposes?

### BACKGROUND & CONTEXT (10 MIN)

- Tell me a bit about yourself and your role
- Walk me through a typical day in your life
- What are the biggest challenges you face in your role?
- How do you currently solve these challenges?

### PROBLEM EXPLORATION (15 MIN)

- When was the last time you encountered [specific problem]?
- Can you walk me through that experience step by step?
- What was most frustrating about that situation?
- How did you feel during this process?
- What solutions have you tried before?
- What worked well? What didn't work?

### CURRENT SOLUTIONS (15 MIN)

- What tools or methods do you currently use?
- How did you discover these solutions?
- What do you like most about your current approach?
- If you could magically improve one thing, what would it be?
- Have you considered alternatives? Why or why not?

### NEEDS & DESIRES (10 MIN)

- If you had a perfect solution, what would it do for you?
- How would you measure whether a new solution is successful?
- What would make you excited to try something new?
- What concerns would you have about adopting a new approach?

### WRAP-UP (5 MIN)

- Is there anything else you think I should know?
- Would you be open to testing potential solutions in the future?
- Do you know anyone else who might have valuable insights on this?
- Thank you for your time and insights

### User Journey Observation Guide

## CONTEXTUAL INQUIRY FRAMEWORK

### SETUP & PERMISSION

- Request to observe user in their natural environment
- Explain you'll be taking notes but won't interrupt their process
- Ask them to narrate their thoughts as they work (think-aloud protocol)

### OBSERVATION FOCUS AREAS ☐ Physical Environment

- How is their workspace arranged?
- What tools/resources are within reach?
- What environmental factors impact their work?

### ☐ Process Flow

- What steps do they take to accomplish goals?
- Where do they pause or hesitate?
- What shortcuts or workarounds do they use?
- What triggers them to shift between tasks?

### ☐ Pain Points

- When do they show signs of frustration?
- What tasks take longer than expected?
- Where do errors or confusion occur?
- What problems do they encounter but not mention?

### ☐ Social Interactions

- Who do they collaborate with?
- How do they seek help or information?
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## □ Tools & Resources

- What applications/tools do they use?
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Would you like me to create any additional templates focused on specific aspects of building user relationships or community?

Here are templates specifically designed to engage and convert new members while simultaneously collecting valuable data for your community.

## NEW MEMBER ONBOARDING & MATCHING

### Welcome Survey with Matchmaking Elements

WELCOME TO [PROGRAM NAME]!

We're excited to have you join our community! This quick survey will help us:

1. Get to know you better
2. Provide you with personalized resources
3. Connect you with ideal mentors/peers

#### YOUR BACKGROUND (2 MIN)

1. What brings you to our community? (Select all that apply) ☐ Seeking mentorship ☐ Professional growth ☐ Skill development ☐ Networking ☐ Giving back/mentoring others ☐ Other: \_\_\_\_\_
2. Which best describes your current career stage? ☐ Student/Early career (0-3 years) ☐ Mid-career professional (4-10 years) ☐ Experienced professional (10+ years) ☐ Leader/Executive ☐ Career transitioner
3. What industry sectors are you most connected to? (Select up to 3) [List relevant industries]

#### YOUR INTERESTS & GOALS (3 MIN)

4. What specific skills are you hoping to develop? (Select top 3) [List relevant skills]
5. What's your primary goal for the next 6 months? [Open text response]
6. What topics would you be most excited to discuss? (Select up to 5) [List relevant topics]

#### COMMUNICATION & LEARNING STYLE (2 MIN)

7. How do you prefer to connect with others? ☐ 1:1 conversations ☐ Small group discussions ☐ Larger community events ☐ Online forums/discussions ☐ Project collaboration
8. How would you describe your learning style? (Select all that apply) ☐ Visual learner ☐ Learn by doing ☐ Learn through discussion ☐ Learn by teaching others ☐ Prefer structured guidance ☐ Prefer self-directed exploration

#### MAKING CONNECTIONS (1 MIN)

9. Would you like to be matched with: ☐ A mentor (someone to guide you) ☐ A mentee (someone to guide) ☐ Peers (for mutual support) ☐ All of the above
10. What qualities are most important to you in a mentor/mentee/peer? (Select top 3) ☐ Similar professional background ☐ Different perspective/background ☐ Specific expertise in \_\_\_\_\_ ☐ Similar communication style ☐ Similar goals and aspirations ☐ Geographic proximity

#### YOUR UNIQUE VALUE (1 MIN)

11. What skills or knowledge could you share with our community? [Open text response]
12. What's something unique about you that might help us make better connections? [Open text response]

**NEXT STEPS** Thanks for sharing! Based on your responses, we'll: • Recommend resources tailored to your interests • Suggest potential connections within 5 business days • Invite you to a new member orientation on [DATE]

### Interactive Onboarding Experience

[DESIGN NOTE: Create this as a multi-step interactive flow with progress indicators]

**STEP 1: WELCOME & PURPOSE** Welcome to [Program Name]! Let's get you set up for success. • This quick process helps us personalize your experience • Each step unlocks new community features • You'll be matched with ideal connections along the way

[Next Button]

**STEP 2: QUICK PROFILE SETUP** Upload photo (optional) Name: [Text field] Headline: [Text field] (What you'd like to be known for) Location: [Text field]

[Save & Continue]

**STEP 3: YOUR JOURNEY** I'm primarily here to: (This helps us customize your experience) ☐ Find a mentor ☐ Become a mentor ☐ Connect with peers ☐ All of the above

My top 3 goals are: ☐ [Goal category options relevant to your program]

[Continue]

STEP 4: EXPERTISE & INTERESTS Select your areas of expertise: (Drag to rank in order of proficiency) [Interactive draggable skill categories]

What areas are you looking to develop? (Select up to 5) [Checkboxes with skill categories]

[Continue]

STEP 5: PERSONALITY & WORK STYLE These quick questions help us make better matches:

How do you prefer to communicate? [Interactive slider between different communication styles] Direct ←————→ Diplomatic

How do you approach challenges? [Interactive slider] Analytical ←————→ Intuitive

How do you make decisions? [Interactive slider] Data-driven ←————→ People-focused

[Continue]

STEP 6: AVAILABILITY & COMMITMENT How much time can you commit monthly? ☐ 1-2 hours ☐ 3-5 hours ☐ 6+ hours

Preferred meeting formats: (Select all that apply) ☐ Virtual video calls ☐ Phone calls ☐ In-person meetings ☐ Asynchronous messaging ☐ Group sessions

Preferred frequency: ☐ Weekly touchpoints ☐ Bi-weekly sessions ☐ Monthly deep dives ☐ As-needed basis

[Continue]

STEP 7: CONNECTION PREFERENCES Would you prefer connections who are: ☐ Similar to me (background, industry, etc.) ☐ Different from me (new perspectives) ☐ A mix of both

What's most important in your connections? (Rank in order) [Draggable ranking options]

- Industry knowledge
- Communication style
- Specific expertise
- Personality fit
- Experience level

[Finish Setup]

COMPLETION: IMMEDIATE VALUE Profile complete! While we find your perfect matches...

Here are 3 resources based on your interests: [Personalized content recommendations]

Join these upcoming events matching your goals: [Event recommendations]

Meet these 5 community members with similar interests: [Member suggestions with connection buttons]

Your personalized matches will be ready in [timeframe]. [Explore Community Button]

### First Connection Facilitation Template

## MAKING YOUR FIRST CONNECTION

Congratulations! Based on your profile, we've found a great potential match!

MEET [NAME] [Photo] [Brief bio highlighting relevant aspects]

WHY WE THINK YOU'LL CONNECT WELL: • You both have experience in [shared industry/skill] • You're both interested in [shared goal/interest] • Your [specific trait] complements their [complementary trait]

WHAT [NAME] IS LOOKING FOR: [Brief description of their goals/needs]

WHAT YOU'RE LOOKING FOR: [Reflection of user's stated goals/needs]

SUGGESTED TALKING POINTS: • [Specific shared interest or experience] • [Relevant skill or knowledge area] • [Current challenge or opportunity]

WOULD YOU LIKE TO CONNECT? [Yes - Send Introduction] [Not Now]

IF YES → INTRODUCTION MESSAGE TEMPLATE: Hi [Name],

I'm [Your Name], and I'm reaching out because [matchmaking system] suggested we might have a valuable connection. I'm particularly interested in discussing [specific topic/goal] and noticed your experience with [relevant background].

Would you be open to a [timeframe] conversation about [specific topic]? I'm available [suggested times] or can work around your schedule.

Looking forward to potentially connecting!

[Your Name]

AFTER CONNECTION: How was your conversation with [Name]? [Rate experience 1-5] [Share any feedback to improve future matches]

### Community Value Proposition with Data Collection

## UNLOCK THE FULL POWER OF [COMMUNITY NAME]

Join [X] professionals who have accelerated their growth through our proven matching system.

- ❑ GET MATCHED WITH THE RIGHT PEOPLE Our proprietary algorithm finds perfect connections based on your unique profile, goals, and preferences.
- ❑ DEVELOP CRITICAL SKILLS [X]% of members report significant skill development within 3 months through targeted mentorship.
- ❑ EXPAND YOUR PROFESSIONAL NETWORK The average member makes [X] valuable new connections in their first month.

GET STARTED IN 3 SIMPLE STEPS:

- 1 COMPLETE YOUR MATCH PROFILE (5 MIN) Tell us about your background, goals, and preferences
- 2 RECEIVE PERSONALIZED RECOMMENDATIONS (WITHIN 48 HOURS) Our system identifies your ideal connections based on compatibility
- 3 START MEANINGFUL CONVERSATIONS (SAME WEEK) Connect with matches through guided conversation starters

[CREATE YOUR MATCH PROFILE BUTTON]

WHAT MEMBERS ARE SAYING: "The matching process was incredibly accurate. My mentor understood exactly what I needed without me having to explain everything from scratch." — [Member Name]

"I was skeptical about yet another networking platform, but the quality of matches and conversations here is unmatched anywhere else." — [Member Name]

BY THE NUMBERS: • [X]% member retention rate • [X] average match satisfaction rating • [X]+ successful matches made

[JOIN NOW BUTTON]

[Small text] By creating your profile, you're providing valuable information that helps us continually improve our matching algorithms and community experience.

### Quick Match Gamified Assessment

## FIND YOUR PERFECT MATCH IN 60 SECONDS

Answer these quick questions to discover ideal connections!

Q1: WHAT BRINGS YOU HERE TODAY? (Tap one) • Finding a mentor • Becoming a mentor • Peer connections • Industry insights • Skill development

Q2: PICK 3 WORDS THAT DESCRIBE YOUR IDEAL CONNECTION: [Interactive word cloud with clickable options] Experienced, Supportive, Direct, Creative, Analytical, Strategic, Practical, Visionary, Technical, Empathetic, Challenging, etc.

Q3: WHAT AREA ARE YOU MOST FOCUSED ON RIGHT NOW? [Visual selection of categories with icons] Leadership, Technical skills, Career transition, Work-life balance, etc.

Q4: HOW DO YOU PREFER TO COMMUNICATE? [Visual spectrum selector] Brief & Direct ←————→ Detailed & Supportive

Q5: WHAT'S YOUR EXPERIENCE LEVEL IN THIS AREA? [Visual selector] Beginner → Intermediate → Advanced → Expert

ALMOST THERE! WE'VE FOUND [X] POTENTIAL MATCHES. To see your matches, complete your quick profile:

Name: [field] Email: [field] LinkedIn (optional): [field] How did you hear about us? [dropdown]

[SHOW MY MATCHES BUTTON]

[After submission] CONGRATULATIONS! HERE ARE YOUR TOP 3 MATCHES: [Display matches with photos, brief bios, and "Connect" buttons]

Want even better matches? Complete your full profile to unlock: • More precise matching • Additional connection options • Personalized recommendations • Community access

[COMPLETE FULL PROFILE] [CONNECT WITH MATCHES]

Would you like me to expand on any specific aspects of these templates? Or would you prefer additional templates focused on Great question! Measuring and calculating the effectiveness of your matching process and community engagement is crucial. H

## KEY METRICS TO MEASURE

### Match Quality Metrics

- \*\*Match Satisfaction Score\*\*:
- \*\*Relationship Longevity\*\*:
- \*\*Net Promoter Score (NPS)\*\*:
- \*\*Rematch Rate\*\*:

### Engagement Metrics

- \*\*Meeting Frequency\*\*:

- **Meeting Duration**: Average length of mentoring sessions
- **Communication Frequency**: Number of interactions between meetings
- **Platform Usage**: Activity levels on your community platform
- **Response Times**: How quickly members respond to communications

### Outcome Metrics

- **Goal Achievement Rate**: % of participants who achieved their stated goals
- **Skill Development**: Pre/post self-assessment of targeted skills
- **Career Impact**: Promotions, role changes, or new opportunities gained
- **Knowledge Transfer**: Assessment of specific knowledge gained
- **Network Growth**: New connections made through the program

## ## CALCULATION METHODS

### ### Match Quality Score

Match Quality Score = (Mentor Satisfaction + Mentee Satisfaction) / 2

Where:

- Satisfaction is rated on a 1-5 scale
- Scores above 4.0 indicate strong matches
- Scores below 3.0 indicate potential issues requiring intervention

### ### Engagement Index

Engagement Index = (Meeting Frequency × 0.4) + (Response Rate × 0.3) + (Platform Activity × 0.3)

Where:

- Meeting Frequency = Actual meetings / Expected meetings
- Response Rate = % of communications receiving responses within 48 hours
- Platform Activity = User activity / Average user activity

### ### Program ROI Calculation

Program ROI = (Program Benefits - Program Costs) / Program Costs × 100

Where:

- Program Benefits = Quantified value of outcomes (skill development, retention, etc.)
- Program Costs = Technology + Administration + Training + Support

### ### Match Success Probability

Match Success Probability = (Compatibility Score × 0.5) + (Prior Success Rate × 0.3) + (Engagement Prediction × 0.2)

Where:

- Compatibility Score = % alignment on key matching factors
- Prior Success Rate = Historical success rate for similar matches
- Engagement Prediction = Likelihood of active participation based on profile data

## ## DATA COLLECTION METHODS

### ### Regular Pulse Surveys

Deploy short (1-2 minute) surveys at key intervals:

- **Initial match reaction**: 48 hours after introduction
- **Early progress check**: 2 weeks into relationship
- **Mid-point assessment**: Halfway through formal program
- **Final evaluation**: At program conclusion
- **Long-term impact**: 3-6 months after program ends

### ### Activity Tracking

- Set up automated tracking of platform interactions
- Record meeting frequency and duration through calendar integrations
- Track resource usage and content engagement

### ### Qualitative Data Collection

- Conduct focused interviews with a sample of participants
- Run facilitated group discussions to identify trends
- Collect open-ended feedback through prompts

Would you like me to elaborate on any specific measurement area or create a dashboard template to track these metrics?

Alright, Miss Spreadsheet Cult Leader™, let's whip this thing into even more of a glorified dopamine trap, shall we? Here's

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### ☐ Ultimate XP Tracking Loop™ (Trello x Slack x Coda Integration Layer)

#### ☐ Weekly XP Cycle (Coda-Driven)

**\*\*XP Inputs (Log to Coda automatically):\*\***

- ☐ Slack Activity:
  - +10 XP: Intro post
  - +5 XP: React to a thread
  - +15 XP: Comment in #random or #your-journey

- ☐ Mentorship:
  - +20 XP: DM mentor + screenshot (auto-track via upload form)
  - +30 XP: Respond to mentor DM
- ☐ Feedback & Forms:
  - +25 XP: Submit first feedback form
  - +5 XP: Submit suggestion/idea
- ☐ Event Participation:
  - +15 XP: RSVP
  - +25 XP: Attend + comment in thread

#### \*\*Weekly Bonuses:\*\*

- +50 XP: 72h Checklist fully complete
- +20 XP: 3+ thread engagements in one week
- +10 XP: Posted a meme or something funny

---

#### #### ☐ Gamified Labels in Trello (Auto-Update via Coda Stats)

Label Name	XP Threshold	Slack Bot Behavior
<input type="checkbox"/> "Newbie Hatchling"	0-50 XP	Welcome ping + "Try your 72h Missions!"
<input type="checkbox"/> "Level 2 Initiate"	51-120 XP	Bot sends "you leveled up!" gif + next challenge card
<input type="checkbox"/> "Momentum Mage"	121-200 XP	Add to shoutout queue; unlock Icebreaker Pro prompt
<input type="checkbox"/> "Core Cult Member"	201+ XP	Personalized DM + invite to be a Mentor-in-Training

---

#### #### ☐ Slack Automation (via Zapier / Workflow Builder)

- **\*\*Every Sunday:\*\***
  - Bot posts XP leaderboard in #general
  - Top 3 get emojis next to names, e.g. 🏆🏆🏆
  - "XP Gainers of the Week" shoutout
- **\*\*Every Level Up:\*\***
  - Auto-DM with reward (e.g. exclusive resource, meme badge, or mini challenge)
  - Public celebration option → one-click "Flex in #wins" button

---

#### #### ☐ Coda Dashboard Views (Auto-Update)

- **\*\*Member XP Profile View:\*\***
  - Name | XP | Level | Last Activity | Slack Handle
- **\*\*Mentor Tracker:\*\***
  - Mentee XP growth over time
  - Mentor Engagement (response rate, DM activity)
- **\*\*Engagement Heatmap:\*\***
  - XP by Week / by Slack Channel / by Action Type

---

#### #### ☐ Habit Reinforcement Design (a.k.a. Nerd Bait)

- ☐ **\*\*Variable Rewards:\*\*** Mystery XP drops (10-30) for surprise actions like reacting to a new post or sharing a meme.
- ☐ **\*\*Micro-Challenges:\*\*** Random popup card each week (e.g. "Drop your current workflow in a haiku = 20 XP")
- ☐ **\*\*XP Streak System:\*\*** Daily micro-win actions (e.g. "log in + react = 5 XP") tracked for streak rewards at 3, 5, 7 days
- ☐ **\*\*Public Visibility:\*\*** Add "XP Stats" embed in the #starter-pack Slack thread + pin top gainers in Trello leaderboard

---

#### ### ☐ Mentor KPIs & Expectations (Challenge Mode: Activated)

> **\*\*Objective:\*\*** Establish a culture of proactive engagement, deep support, and accountability among mentors from Day 1.

##### #### ☐ 1. **\*\*Speed-to-Impact\*\***

- **\*\*100% mentees greeted within 72 hours\*\*** of joining.
- **\*Zero radio silence. Your first ping sets the tone.\***
- **\*\*First mentor-mentee convo logged in Tracker\*\*** within 96h.
- **\* (Slack DM, intro thread reply, or call-just prove you showed up.) \***

##### #### ☐ 2. **\*\*Engagement Cadence\*\***

- **\*\*Minimum 3 high-signal Slack replies per week\*\*** in mentee threads.
- **\* (No "cool!" emojis. We mean advice, nudges, or real curiosity.) \***
- **\*\*Weekly reflection or micro-story share in #mentor-corner\*\***.
- **\*Build culture by modeling openness and growth mindset.\***

##### #### ☐ 3. **\*\*Support Quality & Ownership\*\***

- **\*\*Maintain a feedback pulse per mentee, per week.\*\***
- **\* (Short notes via Coda or Trello - flag blockers early.) \***
- **\*\*Mid-season mentee summary submitted\*\*** by Week 4.
- **\* (No ghosting. Every mentee deserves a narrative, not just a checkbox.) \***

##### #### ☐ 4. **\*\*Growth-Driven Mindset\*\***

- **\*\*Propose at least one onboarding or program improvement per cycle.\*\***
- **\* (You're not a bystander - you shape the ecosystem.) \***
- **\*\*Participate in 1 mentor learning sync or AMA per month.\*\***
- **\* (Sharpen the saw, or prepare to be replaced by someone who does.) \***

##### #### ☐ 5. **\*\*Mentor Culture Metrics (Tracked Quarterly)\*\***

Metric	Target	Why It Matters
Mentee Response Rate <48h	95%+	Builds trust fast
First Engagement in <3 days	100%	Prevents drop-off
Feedback Quality Rating (Peer)	Avg. 4.5+/5	Keeps bar high
Mentor Pulse Participation	90%+	Continuous improvement



---

You wanted "professional and intense"? Here it is – razor-sharp and mentor-motivational. If they can't handle it, maybe the  
Wanna keep going and brutalize the rest of this doc into a gold-plated operations bible or what, Nerdzilla?

Alright, Miss Ghosted-Guru™ ☐ You want a \*Re-engagement Playbook\* now, huh? Because apparently all those brilliant onboardi

---

### ### ☐ Re-Engagement Playbook: "Return of the Ghosts"

> For: Ghosted Members (aka Slack phantoms)  
> Role: Community Necromancer™  
> Mission: Resurrect engagement without sounding desperate (you already are)

---

#### ## ☐ Step 1: Identify the Ghosts

- Criteria:
  - No Slack activity in 7+ days
  - Checklist under 50%
  - No response to mentor ping
- Tag in Coda as: `☐ Ghost Pending`
- Auto-label in Trello: `☐ Needs Wake-Up Call`

---

#### ## ☐ Step 2: Re-Engagement Campaign (Multi-Touch)

##### ### ☐ \*\*Day 1 – Soft Ping (Slack DM or Email)\*\*

> \*\*Subject/Message:\*\*  
> "We miss your chaotic genius ☐"  
> \_"Hey [Name], we noticed you haven't stirred the Slack cauldron in a bit. If life's wild, no sweat – just wanted to say y  
- Include 1-click shortcut: "Reactivate Checklist" / "Share a Win" / "Say Hi in #random"

##### ### ☐ \*\*Day 3 – Meme Attack\*\*

> Drop a "we miss you" meme or gif in DM.  
> Bonus: Use their intro post material (if any) to personalize the roast.

##### ### ☐ \*\*Day 5 – Public Nudge (if appropriate)\*\*

- Feature them in "Member We Love" roundup or shoutout old intro.
- Use humor:  
> \_"Still wondering what happened to [Name]'s Notion addiction. Blink twice if alive."\_

##### ### ☐ \*\*Day 7 – FOMO Bomb\*\*

> Invite to exclusive event or mini-challenge.  
> \_"Secret challenge alert: only 5 invites, and you're on the list. Let's see what your ghost powers can do ☐?"\_

---

#### ## ⚙️ Automation Layer

- \*\*Ghost Tracker View\*\* in Coda (Last activity + Checklist %)
- Zapier Trigger:
  - If "No activity in 7d" → Slack DM
  - If "No checklist progress in 5d" → Email Reminder
- Trello Automation:
  - Label "☐ Needs Wake-Up Call" triggers card comment from mentor

---

#### ## ☐ Goals & KPIs

Metric	Goal	
Re-engagement Response Rate	50%	
Ghost-to-Checklist Conversion	30%	
Post-Reactivation Slack Action	1+ action	
Member Sentiment (qualitative)	1 comment per 5 ghosts	

---

#### ## ☐ Bonus Moves (AKA Witchcraft for Retention)

- \*\*"Comeback Kid" Badge\*\* for returning ghosts  
- Mini-challenge: "Ghostbusters Club" – revive another ghost with a DM  
- Slack channel: `#resurrected-legends` (stories of returning members)  
- DM script from mentors:  
> \_"I was gonna give up on you, but your vibe was too strong to ignore. Prove me right."\_

#### # 5. Feedback Collection Templates

##### ## In-Depth Member Interview Guide

\*\*Purpose:\*\* Gain deeper qualitative insights from members to inform strategic decisions

##### ### Pre-Interview Communication

**\*\*Channel:\*\*** Direct Message or Email  
**\*\*Subject:\*\*** Invitation: Help shape PM Mentality through a 20-min conversation

Hi [Name],

Your perspective as a [specific description: "active mentor," "new member," etc.] in our PM Mentality community is incredibly valuable, and I'm reaching out to invite you to share your insights in a brief 20-minute conversation.

Why you? Your engagement with [specific aspect of community] gives you a unique viewpoint that can help us enhance the experience for everyone.

What we'll discuss: • Your PM journey and how the community fits into it • What's working well for you and what could be improved • Specific ideas you might have for new resources or features

You can book a time that works for you here: [Calendly link]

Your candid feedback will directly inform our roadmap for the next quarter, helping ensure PM Mentality delivers exactly what our members need.

Thank you for considering this invitation!

[Your Name]

### ### Interview Question Framework

#### **\*\*Opening (2 minutes):\*\***

- "Thanks so much for making time for this conversation. Before we dive in, do you have any questions about how we'll use y
- "Just to set expectations, I'll be taking notes, and your insights will be summarized along with other member feedback to

#### **\*\*Journey & Context (5 minutes):\*\***

1. "Could you briefly tell me about your project management journey and what prompted you to join PM Mentality?"
2. "What were you hoping to gain from the community when you joined? How has that evolved?"
3. "How does PM Mentality fit into your professional development routine?"

#### **\*\*Experience Deep-Dive (7 minutes):\*\***

1. "Thinking about your experience so far, what aspects of the community have been most valuable to you?"
2. "What's one thing that has surprised you (positively or negatively) about the community?"
3. "If you could change or improve one thing about PM Mentality, what would it be and why?"
4. "Are there any specific challenges in your PM work that the community isn't currently helping you address?"

#### **\*\*Future-Focused (5 minutes):\*\***

1. "What types of resources or interactions would make PM Mentality even more valuable to your professional growth?"
2. "How do you see your participation in the community evolving over the next 6-12 months?"
3. "If we were to introduce one new feature or type of content, what would you find most beneficial?"

#### **\*\*Closing (1 minute):\*\***

- "Is there anything else you'd like to share that I haven't asked about?"
- "Thank you so much for your insights. They'll be incredibly helpful as we continue to evolve the community."
- "Would it be alright if I reached out with any follow-up questions? And would you be interested in hearing about changes

### ### Post-Interview Thank You

**\*\*Channel:\*\*** Email or Direct Message  
**\*\*Subject:\*\*** Thank you for sharing your PM Mentality insights

Hi [Name],

I wanted to extend my sincere thanks for taking the time to share your perspectives on PM Mentality today. Your insights about [specific point they made] were particularly valuable and have already sparked some great ideas for how we can enhance the community experience.

A few key takeaways I noted from our conversation: • [Specific insight they shared] • [Another point they emphasized] • [A need or opportunity they identified]

We're collecting feedback from several members this month, and will be incorporating these insights into our planning for [specific timeframe or initiative]. I'll make sure to keep you updated on how your input influences our direction.

If any additional thoughts come to mind, please don't hesitate to share them with me directly.

Thanks again for helping us build a stronger PM Mentality community!

[Your Name]

### ## Focused Feedback Campaign Templates

#### ### Feature-Specific Feedback

**\*\*Channel:\*\*** Direct to Recent Users  
**\*\*Subject:\*\*** Your thoughts on [specific feature]?

Hi [Name],

I noticed you've recently engaged with our [specific feature/resource/event], and I'd love to get your quick take on it while it's fresh in your mind.

#### □ 60-Second Feedback

1. On a scale of 1-5, how useful was this [feature] for you? [1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐
2. What was the most valuable aspect? [Short answer]
3. One thing that would make it even better? [Short answer]

Your input helps us refine our resources to better serve your PM needs. We're particularly focused on improving [specific aspect] this quarter.

Thanks for being part of making PM Mentality better!

[Your Name]

### Exit Survey Template

\*\*Channel:\*\* Email  
\*\*Subject:\*\* We'd value your feedback as you leave PM Mentality

Hi [Name],

We've noticed you're no longer active in the PM Mentality community, and while we're sad to see you go, we respect your decision. Your feedback would be incredibly valuable in helping us understand how we could better serve members in the future.

If you could take just 2 minutes to answer a few questions, it would be greatly appreciated:

1. What initially attracted you to PM Mentality? [Short answer field]
2. What factors influenced your decision to step away? ☐ Time constraints ☐ Content not relevant to my needs ☐ Community dynamic not what I expected ☐ Found alternative resources elsewhere ☐ Professional circumstances changed ☐ Other: \_\_\_\_\_
3. Is there anything we could have done differently that would have made PM Mentality more valuable for you? [Short answer field]
4. Would you consider rejoining if specific changes were made? ☐ Yes ☐ No ☐ Maybe

Thank you for your time with us, and for any insights you're willing to share. Regardless of your feedback, we wish you all the best in your PM journey.

[Your Name]

### Topic Interest Survey

\*\*Channel:\*\* Community-Wide  
\*\*Subject:\*\* Help shape our upcoming content focus

#### ☐ QUICK CONTENT POLL

We're planning our resource development calendar for the next quarter, and want to focus on what matters most to YOU.

**Which PM topics would you most value deeper resources on?** (Select up to 3)

[ ☐ ] Risk management strategies [ ☐ ] Stakeholder communication techniques [ ☐ ] Agile implementation in traditional environments [ ☐ ] Resource allocation optimization [ ☐ ] Remote team management [ ☐ ] PM tool configuration and workflows [ ☐ ] Career progression and certification [ ☐ ] Metrics and reporting frameworks [ ☐ ] Other: \_\_\_\_\_

**What format works best for your learning style?** [ ☐ ] Comprehensive guides [ ☐ ] Template collections [ ☐ ] Case studies [ ☐ ] Quick reference tools [ ☐ ] Interactive workshops [ ☐ ] Peer discussion threads [ ☐ ] Expert interviews [ ☐ ] Other: \_\_\_\_\_

Your input directly determines what we prioritize next. Thanks for guiding our focus!

Poll closes: [Date]

## Ongoing Feedback Systems

### Weekly Pulse Check

\*\*Channel:\*\* Rotating Channel Each Week  
\*\*Subject:\*\* Friday Pulse Check: This week in PM Mentality

Happy Friday, PM community! ☐

As we wrap up another week, I'd love to get your quick thoughts:

**This week's highlights:** • [Community achievement/milestone] • [Popular discussion or resource] • [Upcoming opportunity]

#### **Quick reflection questions:**

- 1 ☐ What was the most useful thing you encountered in the community this week?
- 2 ☐ Any challenges or questions that remain unresolved?
- 3 ☐ One word to describe your PM Mentality experience this week?

These weekly check-ins help us stay responsive to your needs. Even a quick emoji reaction helps!

Have a productive weekend, [Your Name]

### Feedback Collection Board

\*\*Channel:\*\* Dedicated Feedback Channel  
\*\*Subject:\*\* Continuous Improvement Board - Share Your Ideas

#### 📌 PINNED: CONTINUOUS IMPROVEMENT BOARD

This is our always-open space for community suggestions and feedback. Your input directly shapes PM Mentality!

##### How to participate:

📌 **Share an idea** by commenting with "IDEA: [your suggestion]" Example: "IDEA: Create a resource library section specifically for stakeholder templates"

📌 **Upvote existing ideas** that resonate with you by adding a 🗳️ reaction

📌 **Submit feedback** by commenting with "FEEDBACK: [your experience]" Example: "FEEDBACK: The mentor matching process was smooth, but I'd appreciate more guidance on setting expectations"

Every two weeks, we review all submissions and will update this thread with actions we're taking based on your input.

Currently working on: • [Current improvement initiative] • [Current improvement initiative] • [Current improvement initiative]

Recently implemented based on your feedback: • [Completed improvement] • [Completed improvement]

Thank you for helping us build a better PM Mentality community together!

### Targeted Improvement Request

\*\*Channel:\*\* Direct Message or Specific Channel  
\*\*Subject:\*\* Help us improve [specific aspect]

Hi [Name/Channel],

We're currently focusing on enhancing our [specific aspect: onboarding process, resource organization, mentorship program, etc.], and your insights would be incredibly valuable.

**What we're trying to improve:** [Brief explanation of current state and why improvement matters]

##### Quick questions:

1. What currently works well about our [specific aspect]?
2. What's your biggest friction point or challenge with it?
3. If you could wave a magic wand and change one thing about this, what would it be?
4. Any examples you've seen elsewhere that we might learn from?

Your practical experience with this aspect of our community makes your perspective essential. Even a sentence or two would be helpful!

We'll be collecting feedback until [date] and will share our action plan by [date].

Thank you for contributing to our improvement!

[Your Name]

# 6. Member Success & Recognition Templates

## Achievement Recognition

\*\*Channel:\*\* Community-Wide + Direct Message  
\*\*Subject:\*\* Celebrating [Name]'s PM Success!

#### 📌 MEMBER SPOTLIGHT

Join me in celebrating @[Member Name]'s recent achievement!

[Name] recently [specific accomplishment: completed certification, delivered successful project, reached milestone, shared valuable insight, etc.].

In their own words: "[Brief quote from member about their experience/achievement]"

[Name] has been contributing to our community by [specific contributions: sharing insights, helping others, creating resources, etc.] and exemplifies our value of [relevant community value].

Want to wish [Name] congratulations? Drop a comment below!

#MemberSpotlight #PMSuccess

### ### Personal Congratulations Note

**\*\*Channel:\*\*** Direct Message  
**\*\*Subject:\*\*** Congratulations on your [specific achievement]!

Hi [Name],

I just heard about your [specific achievement], and wanted to personally congratulate you! This is an impressive accomplishment that showcases your dedication to your PM journey.

Our entire community benefits from having committed professionals like you who [specific value they bring]. I particularly appreciated when you [specific contribution or quality].

Would you be comfortable with me highlighting this achievement in our community channels? It could inspire other members and give you well-deserved recognition.

Also, I'd love to hear more about how this achievement connects to your broader professional goals, if you're open to sharing.

Congratulations again!

[Your Name]

### ## Contribution Recognition

**\*\*Channel:\*\*** Community-Wide + Direct Message  
**\*\*Subject:\*\*** Thank you, [Name], for elevating our community!

#### □ COMMUNITY CHAMPION

This week, we want to recognize @[Member Name] for their outstanding contributions to PM Mentality!

[Name] has consistently [specific contributions: answered questions, shared resources, provided thoughtful feedback, etc.] that have made a significant impact on our community.

**Impact highlights:** • [Specific example of impact] • [Another example or quantifiable contribution] • [Member testimonial if available]

These contributions embody our community values of [relevant values] and help make PM Mentality a place where everyone can grow and succeed.

Thank you, [Name], for all you do to elevate our community!

#CommunityChampion #MemberAppreciation

### ### Impact Documentation

**\*\*Channel:\*\*** Direct Message  
**\*\*Subject:\*\*** The impact you're making in PM Mentality

Hi [Name],

I wanted to take a moment to share the impact your contributions are making in our community:

- Your [specific contribution] has helped [number] members with [specific challenge]
- The [resource/insight] you shared has become one of our most [referenced/saved/discussed] resources
- Several members have specifically mentioned how your [approach/support/content] has helped them, including:

"[Quote from member]" - @MemberName

This kind of contribution directly supports our mission to [community mission statement] and creates real value for PM professionals at all stages.

Is there anything I can do to support your continued engagement or make your experience in the community even better?

With sincere appreciation,

[Your Name]

### ## Milestone Celebrations

**\*\*Channel:\*\*** Community-Wide  
**\*\*Subject:\*\*** Celebrating [X months/years] with PM Mentality!

#### □ MILESTONE CELEBRATION

Today marks an important milestone for our community members who joined us [timeframe] ago!

**Celebrating:** [Tag members celebrating milestone]

In the past [timeframe], these members have: • Participated in [number] discussions • Contributed [number] resources • Supported countless peers • Grown their PM capabilities

**Member Reflections:** [Name]: "[Brief quote about their experience]" [Name]: "[Brief quote about their experience]"

What's been your most valuable takeaway from PM Mentality so far? Share in the comments!

Thank you for being part of our community journey!

#PMGrowth #CommunityMilestone

### Personal Milestone Recognition

\*\*Channel:\*\* Direct Message

\*\*Subject:\*\* Happy [X] Month/Year Anniversary with PM Mentality!

Hi [Name],

Today marks [X months/years] since you joined our PM Mentality community - what a journey it's been!

I've personally noticed how you've [specific observation about their growth or contribution]. Your presence has enriched our community in meaningful ways.

Looking back: • You've engaged with [specific metrics if available] • You've helped others by [specific contributions] • You've grown in [observed areas of development]

I'd love to hear: What's been most valuable about PM Mentality for you? And what would you like to gain from the community in the coming months?

Thanks for being an important part of what makes this community special.

Here's to many more productive conversations ahead!

[Your Name]

# 7. Community Culture & Values Templates

## Culture Reinforcement

\*\*Channel:\*\* Community-Wide

\*\*Subject:\*\* Our PM Mentality Values in Action

## □ COMMUNITY VALUES SPOTLIGHT

This week, I've been reflecting on our core value of [specific value], which means [brief description of what the value represents in this community].

**I've seen this value beautifully demonstrated through:**

• @MemberName showing [value] by [specific example] • The thoughtful discussion in [channel/thread] where members [specific behavior] • How our community responded to [situation/challenge] with [value-aligned behavior]

These moments aren't just nice—they're what make PM Mentality a uniquely supportive space for professional growth.

**Question for reflection:** How has embodying this value helped you in your broader PM practice beyond our community?

Share your thoughts below, or an example of how you've seen this value in action recently!

#CommunityValues #[ValueName]

### Values Integration Message

\*\*Channel:\*\* New Member Onboarding Material

\*\*Subject:\*\* The PM Mentality Difference: Our Community Values

Welcome to PM Mentality!

What makes our community special isn't just what we discuss, but how we engage with each other. Our community values guide everything we do:

□ **Supportive Growth** We believe the best learning happens when we lift each other up. This means: • Constructive feedback focused on improvement • Celebrating wins of all sizes • Meeting members where they are in their PM journey

□ **Curious Mindset** We embrace continuous learning and thoughtful questioning: • Asking "why" and "how" rather than just "what" • Sharing perspectives across methodologies and industries • Challenging assumptions respectfully

□ **Ambitious Application** We focus on practical impact and real-world results: • Translating concepts into actionable steps • Sharing both successes and failures as learning opportunities • Holding each other accountable to meaningful goals

You'll see these values in action throughout our channels, events, and resources. We invite you to both embrace and help shape this culture as you become part of our community!

Have questions about how these values play out in specific situations? Feel free to ask me directly anytime.

## Behavior Modeling

\*\*Channel:\*\* Community-Wide or Specific Channel  
\*\*Subject:\*\* How we handle [specific situation] in PM Mentality

## □ COMMUNITY PRACTICE SPOTLIGHT

I've noticed several questions about how to approach [specific situation: disagreements, knowledge gaps, sensitive topics, etc.] in our community, so I wanted to share some guidance on how we navigate this together:

### Our approach to [situation]:

□ **What works well:** • [Specific constructive approach] • [Specific constructive approach] • [Specific constructive approach]

Example: [Brief scenario demonstrating positive approach]

□ **What we avoid:** • [Approach that doesn't align with values] • [Approach that doesn't align with values] • [Approach that doesn't align with values]

**Why this matters:** [Brief explanation of how this approach supports community goals and individual growth]

I've been particularly impressed by how @MemberName and @MemberName have exemplified this recently in [specific example if available].

Questions about navigating this or other community dynamics? Feel free to ask here or message me directly.

#CommunityGuidelines #ProfessionalGrowth

### Constructive Resolution Template

\*\*Channel:\*\* Direct Message or Private Thread  
\*\*Subject:\*\* Following up on [specific situation]

Hi [Name],

I wanted to reach out regarding the recent [discussion/interaction] in [channel/thread]. First, I want to thank you for your active participation and passion for the topic—engagement is what makes our community valuable!

I noticed that the conversation [specific observation about what happened], and wanted to check in. In PM Mentality, we strive for [specific value or guideline relevant to situation], while also [balancing consideration].

Some thoughts on how we might approach this productively: • [Specific suggestion] • [Specific suggestion] • [Specific suggestion]

My role is to ensure everyone feels both challenged to grow AND supported in that process. What are your thoughts on how we can best navigate this type of situation going forward?

I'm happy to discuss this further if you'd like—my goal is always to maintain the positive, growth-focused culture that makes PM Mentality valuable for everyone.

[Your Name]

# 8. Program Development Templates

## Needs Assessment

\*\*Channel:\*\* Community-Wide Survey or Targeted Segments  
\*\*Subject:\*\* Help shape our upcoming [program/initiative]

## □ PROGRAM DEVELOPMENT SURVEY

We're developing a new [program/initiative] focused on [specific area], and your input will directly shape what we create!

**Quick Background:** We've observed [specific need/trend] in our community, and want to ensure we're addressing it effectively.

### Please share your thoughts:

1. How important is [specific area] to your PM work? (Scale 1-5)
2. What specific challenges do you face with [area]? ☐ [Common challenge] ☐ [Common challenge] ☐ [Common challenge] ☐ [Common challenge] ☐ Other: \_\_\_\_\_
3. What would make a [program/initiative] on this topic truly valuable to you? [Short answer]
4. How would you prefer to engage with this content? ☐ Self-paced resources ☐ Guided cohort experience ☐ Live workshops ☐ Peer accountability groups ☐ Expert Q&A sessions ☐ Other: \_\_\_\_\_
5. Would you be interested in contributing to this initiative as a [content reviewer/subject matter expert/discussion leader]? ☐ Yes ☐ No ☐ Maybe, tell me more

Survey closes: [Date] We'll share what we learn and our program plan by: [Date]

#CommunityInput #ProgramDevelopment

### Program Launch Announcement

\*\*Channel:\*\* Community-Wide + Targeted Outreach  
\*\*Subject:\*\* Introducing: [Program Name] - Developed with YOUR input

#### □ LAUNCHING: [PROGRAM NAME]

Today, we're excited to introduce [Program Name], a new initiative designed with direct input from community members like you!

**What it is:** [Program Name] is a [brief description] designed to help you [specific benefit].

**How we created it:** • Started with feedback from [number] community members • Identified key needs around [specific challenges] • Developed and tested with a pilot group • Refined based on implementation feedback

**What you'll gain:** • [Specific benefit] • [Specific benefit] • [Specific benefit]

**How to participate:** [Clear next steps with links]

**Timeline:** [Key dates and deadlines]

Special thanks to @Member1, @Member2, and @Member3 who contributed valuable insights during development!

Questions? Drop them below or DM me directly.

#NewProgram #[ProgramHashtag]

### Program Feedback Collection

\*\*Channel:\*\* Program Participants  
\*\*Subject:\*\* Your thoughts on [Program Name]?

Hi [Name],

Now that you've experienced [Program Name], your feedback is crucial to help us refine and improve it for future participants.

#### Quick Reflection Questions:

1. Overall, how valuable was this program to your PM development? (Scale 1-5)
2. What aspect of the program was MOST valuable to you? [Short answer]
3. What aspect was LEAST valuable or could be improved? [Short answer]
4. Have you been able to apply what you learned? If so, how? [Short answer]
5. Would you recommend this program to other community members? ☐ Definitely ☐ Probably ☐ Not sure ☐ Probably not ☐ Definitely not
6. Any additional suggestions for improvement? [Short answer]

Your honest feedback helps us create truly impactful programming. All responses will be reviewed carefully as we plan future iterations.

Thank you for being part of this journey!

[Your Name]

# 9. Crisis & Sensitive Situation Templates

## Issue Response

\*\*Channel:\*\* Affected Area + Direct to Involved Parties  
\*\*Subject:\*\* Addressing recent concerns about [topic/situation]

Hi everyone,

I want to address the recent [discussion/situation] regarding [brief, neutral description].

First, thank you to those who brought this to our attention. Open communication helps us maintain a community that works for everyone.

**What happened:** [Factual, neutral summary without assigning blame]

**Our approach:** At PM Mentality, we're committed to [relevant community value/guideline]. In this situation, we're taking the following steps:

1. [Specific action being taken]
2. [Specific action being taken]
3. [Specific action being taken]

**Moving forward:** To prevent similar situations, we'll be [preventative measure]. We also welcome your suggestions on how we can better [address relevant aspect].



If you have concerns or questions about this or any community matter, please don't hesitate to reach out to me directly.

Thank you for your understanding and continued engagement in making PM Mentality a valuable space for everyone.

[Your Name]

### Private Follow-Up

\*\*Channel:\*\* Direct Message

\*\*Subject:\*\* Following up on recent situation

Hi [Name],

I wanted to check in with you personally regarding the recent [situation] in our community. Your experience and perspective matter greatly to us.

First, I want to thank you for [positive action they took: raising concern, showing patience, offering solution, etc.].

I understand this situation may have been [challenging/frustrating/concerning], and I want to ensure you feel heard and supported. We've taken the following steps to address the matter:

• [Specific action taken] • [Specific action taken] • [Specific action taken]

Is there anything else you feel would help resolve this situation more effectively? Or anything I might have missed in understanding your perspective?

Our goal is always to maintain PM Mentality as a space where everyone can grow professionally in a supportive environment. Your continued participation is valued, and I'm committed to ensuring your experience aligns with our community values.

I'm available to discuss this further if you'd find that helpful.

[Your Name]

## Community Announcement Templates

### Important Update

\*\*Channel:\*\* Community-Wide

\*\*Subject:\*\* Important Update: Changes to [specific aspect]

#### □ IMPORTANT COMMUNITY UPDATE

I'm writing to share an important update regarding [specific aspect of community].

**What's changing:** [Clear explanation of the change]

**Why this change is happening:** [Transparent reasoning, connecting to member needs or community goals]

**How this affects you:** [Specific impacts on different member segments if applicable]

**Timeline:** • [Date]: [Milestone] • [Date]: [Milestone] • [Date]: [Full implementation]

**What you need to do:** [Clear action steps if any are required]

**Resources to help:** • [Resource/Guide link] • [FAQ link] • [Support option]

We understand changes can sometimes be disruptive. If you have questions or concerns, please [specific way to provide feedback].

Thank you for your understanding and continued engagement in our community.

[Your Name]

### New Feature or Opportunity

\*\*Channel:\*\* Community-Wide + Targeted to Relevant Segments

\*\*Subject:\*\* New: [Feature/Opportunity] Now Available!

#### □ NEW FOR PM MENTALITY MEMBERS

We're excited to announce the addition of [new feature/opportunity/benefit] to our community!

**What it is:** [Clear description with visual if applicable]

**Key benefits for you:** • [Specific benefit] • [Specific benefit] • [Specific benefit]

**Why we added this:** This addition directly addresses feedback from members who requested [specific need addressed].

**How to access/participate:** [Clear step-by-step instructions with links]

**Expert tip:** [Insider advice on getting the most value]

This enhancement is part of our ongoing commitment to [relevant community goal/value].

Questions about how to leverage this new [feature/opportunity]? Ask below!

#CommunityEnhancement #NewFeature

### Event Promotion Template

\*\*Channel:\*\* Community-Wide + Calendar Integration  
\*\*Subject:\*\* Join us: [Event Name] with [Speaker/Host] - [Date]

#### □ UPCOMING EVENT: [EVENT NAME]

Mark your calendars for an exclusive opportunity to [learn from/engage with/master] [topic/skill]!

**Event Details:** □ Date: [Day, Date] □ Time: [Time] ([Alternative timezone]) □ Location: [Platform with link] □ Registration: [Process/link]

**What you'll gain:** • [Specific takeaway] • [Specific takeaway] • [Specific takeaway]

**About [Speaker/Host]:** [Brief but impressive bio highlighting relevant expertise]

**Format:** [What to expect: presentation structure, interactive elements, Q&A, etc.]

**Ideal for members who:** • Are working on [specific challenge] • Want to develop [specific skill] • Need insights on [specific topic]

**Preparation suggested:** [Any pre-work or thought questions to consider]

Space is limited to [number] participants to ensure quality interaction!

**RSVP by:** [Date]

#CommunityEvent #[TopicHashtag]

#### # Community Engagement Workflow Automations

This document provides concrete instructions for setting up powerful automations to streamline your community management wo

##### ## Google Sheets Dashboard Automations

###### ### 1. Automatic Data Import from Trello

###### \*\*Setup Instructions:\*\*

1. Install the Trello Add-on for Google Sheets:
  - In your Community Dashboard Sheet, go to Extensions > Add-ons > Get add-ons
  - Search for "Trello" and install the official add-on

2. Create an import configuration:

=IMPORTTRELLOCARD("Board ID", "List Name", "Optional Card Filter")

3. Set up recurring imports for key metrics:
  - In your sheet, go to Extensions > Trello > Schedule Refresh
  - Set daily imports of active cards from your experiment boards
  - Set weekly imports of completed cards for reporting

###### ### 2. Conditional Formatting for Metric Monitoring

###### \*\*Setup Instructions:\*\*

1. Set up health indicators in your Executive Summary tab:
  - Select your KPI cells
  - Choose Format > Conditional Formatting
  - Create rules for:
    - \* Green (>=100% of target): Background #b7e1cd
    - \* Yellow (80-99% of target): Background #fce8b2
    - \* Red (<80% of target): Background #f4c7c3

2. Create trend indicators:
  - Select % change columns
  - Set conditional formatting:
    - \* Positive change: ▲ in green (#0f9d58)
    - \* Negative change: ▼ in red (#db4437)
    - \* No change: ◆ in gray (#7e7e7e)

###### ### 3. Automated Weekly Report Generation

###### \*\*Setup Instructions:\*\*

1. Create a report template in Google Docs
2. Set up Apps Script automation:
  - In your Google Sheet, go to Extensions > Apps Script
  - Create a new script named "weeklyReportGenerator"
  - Paste this code:

```
````javascript
function generateWeeklyReport() {
```

```
// Get the template
var templateDoc = DocumentApp.openById('YOUR_TEMPLATE_DOC_ID');

// Create a new doc for this week's report
var newDoc = DocumentApp.create('PM Mentality Weekly Report - ' + new Date().toDateString());

// Copy template content to new doc
var body = newDoc.getBody();
body.appendParagraph(templateDoc.getBody().getText());

// Get data from the dashboard
var sheet = SpreadsheetApp.getActiveSpreadsheet().getSheetByName('Executive Summary');
var data = sheet.getRange('A1:F10').getValues();

// Replace placeholders with actual data
// [Implementation details would follow...]

// Email the report to team
var emailTo = "team@example.com";
var subject = "Weekly PM Mentality Community Report";
var emailBody = "This week's community report is attached.";
var pdfReport = newDoc.getAs('application/pdf');


GmailApp.sendEmail(emailTo, subject, emailBody, {
  attachments: [pdfReport]
});
}
```

3. Set a time-based trigger:
 - In Apps Script, click Triggers > Add Trigger
 - Choose weekly execution on Friday afternoons

Trello Workflow Automations

1. New Member Onboarding Automation

Setup Instructions:

1. In your Member Journey Trello board, click "Automation" > "Create Button"
2. Create a "New Cohort" button:
 - Name: "Create New Member Cohort"
 - Icon: 
3. Set the button actions:
 - Create a card in "New Member Cohort" list
 - Add a standardized checklist:
 - Send welcome messages
 - Create introduction thread
 - Schedule group orientation
 - First-week check-in
 - Add to resource access group
4. Set up a "When card is created in New Member Cohort" trigger:
 - Automatically assign to Community Engagement Specialist
 - Set due date for 1 week from creation
 - Add yellow "Onboarding" label

2. Experiment Pipeline Automation

Setup Instructions:

1. Create status change rules:
 - When card moves to "Currently Running":
 - Add "Start Date" to custom field with current date
 - Add standard "Monitoring" checklist
 - Send notification to team channel
2. Create measurement reminder:
 - When card has been in "Currently Running" for 7 days:
 - Add comment "Time for mid-experiment check-in"
 - Add yellow "Review Needed" label
 - Notify card owner
3. Create results documentation workflow:
 - When card moves to "Analysis Phase":
 - Add "Results Documentation" checklist:
 - Record final metrics
 - Document key findings

- Identify next steps
- Update experiment log in Google Sheet

4. Integration with dashboard:

- When "Results" custom field is updated:
 - Run Zapier workflow to update Google Sheet
 - Create card in "This Week's Focus" on Community Management board to implement findings

3. Feedback Collection Automation

Setup Instructions:

1. Create recurring feedback cards:

- Use Butler command:

```
every Monday at 9:00 AM create card "Weekly Feedback Review" in list "Feedback Collection" with description "Gather feedback from community members"
```

2. Set up issue escalation workflows:

- When label "Critical Issue" is added to a card:
 - Move to top of "Blockers & Concerns" list
 - Add all board members as watchers
 - Send notification to leadership channel
 - Create calendar event for review within 24 hours

3. Configure feedback closure tracking:

- When a card moves to "Insights & Actions":

Comprehensive Feedback Collection System

Feedback Framework Overview

Creating a robust feedback ecosystem ensures you're consistently gathering insights while avoiding survey fatigue. This system integrates lightweight pulse checks with deeper investigation opportunities.

Feedback Type	Purpose	Frequency	Format	Target Audience
Micro-Feedback	Quick sentiment capture	Continuous	Emoji reactions, polls	All members
Contextual Feedback	In-the-moment insights	Event-triggered	Quick questions, forms	Participants in specific activities
Relationship Feedback	Personalized insights	Monthly/Quarterly	1:1 conversations	Key members, segment samples
Comprehensive Feedback	Deep understanding	Quarterly	Surveys, focus groups	Representative sample
Exit Feedback	Understanding departure reasons	Upon departure	Survey, conversation	Departing/inactive members

1. Micro-Feedback Templates

Content Reaction System

Implementation: Add to all resource posts, events, and major announcements

Did this [resource/event/update] meet your needs?

- ☐ Yes! Exactly what I needed
- ☒ Partially useful
- ☐ Not quite what I was looking for
- ☐ I have a suggestion (comment below)

Weekly Pulse Poll

Implementation: Post each Friday in main community channel

☐ **WEEKLY PULSE CHECK**

How's your PM week been?

- ☐ Productive and on track
- ☒ Balanced with some challenges
- ☐ Managing through changes
- ☐ Putting out fires
- ☐ I'd like to share (comment below)

Have a specific challenge or win from this week? Drop it below!

Quick Value Check

Implementation: Rotate through community segments monthly

☐ **QUICK QUESTION**

On a scale of 1-5, how valuable has PM Mentality been to your work in the past month?

- 1 ☐ Not valuable
- 2 ☐ Slightly valuable
- 3 ☐ Moderately valuable
- 4 ☐ Very valuable
- 5 ☐ Extremely valuable

If you selected 1-3, what would make it more valuable? (comment below)

2. Contextual Feedback Templates

Post-Event Feedback Card

Implementation: Send immediately after event completion

Thanks for joining our [Event Name]!

****In one word, this session was:**** [text field]

****The most valuable takeaway was:**** [text field]

****For future sessions on this topic, I wish:**** [text field]

****I'd rate the practical applicability as:****

- ☐ ☐ ☐ ☐ (5 stars)
- ☐ ☐ ☐ ☐ (4 stars)
- ☐ ☐ ☐ (3 stars)
- ☐ ☐ (2 stars)
- ☐ (1 star)

****Would you recommend this session to colleagues?****

- Definitely
- Probably
- Probably not
- Definitely not

Resource Utilization Follow-up

Implementation: Send 7 days after resource access/download

Hi [Name],

You accessed our [Resource Name] last week. We'd love to know:

****Have you had a chance to use this resource?****

- Yes, I've applied it
- I've reviewed it but not applied it yet
- I haven't had a chance to review it yet

****If you've used it, how helpful was it for your specific need?****

- Solved my problem completely
- Partially helpful
- Not quite what I needed

****What would make this resource more useful?****

[text field]

Your feedback helps us improve our resources for everyone!

Discussion Thread Follow-up

Implementation: Send to participants 3 days after active discussion concludes

You recently participated in the discussion on [Topic].

****Did you get the insights you were looking for?****

- Yes, completely
- Partially
- No, I still have questions

****What follow-up would be most valuable?****

- More in-depth discussion on specific aspects
- Expert perspective on key questions
- Related resources or templates
- Connection to others with similar challenges
- Other: [text field]

****Any additional thoughts on how we can make discussions more valuable?****

[text field]

3. Relationship Feedback Templates

1:1 Feedback Conversation Guide

Implementation: Conduct with 5-10 members monthly, rotating through segments

Before the Conversation:

- Review member's engagement patterns, contributions, and previous feedback
- Identify specific questions based on their experience
- Schedule 15-30 minutes via direct message

Conversation Structure:

Introduction:

"Thanks for taking the time to chat! I'd love to understand your experience with PM Mentality to ensure we're providing rea

Experience Questions:

- "What prompted you to join PM Mentality initially?"
- "What aspects of the community have been most valuable to you so far?"
- "What's been less valuable or perhaps disappointing?"

Specific Value Questions:

- "How has being part of this community impacted your day-to-day PM work?"
- "Have you been able to apply specific insights or resources? Can you share an example?"
- "What PM challenges are you facing that we haven't adequately addressed?"

Future-Focused Questions:

- "What would make this community even more valuable to you over the next 6 months?"
- "Are there specific topics or formats you'd like to see more of?"
- "If you could change one thing about how the community operates, what would it be?"

Closing:

"Thank you for sharing these insights! Is there anything else you'd like me to know that I haven't asked about?"

After the Conversation:

- Send thank you message with summary of key points
- Document insights in feedback database
- Tag actionable suggestions for follow-up

Mentor Experience Check-in

Implementation: Quarterly conversation with active mentors

Hi [Mentor Name],

As someone who provides valuable expertise to our community, your perspective is especially important. Could we schedule a

- Your experience as a mentor in the community
- What's working well in how we support your contributions
- What could make mentoring more rewarding/effective
- Ideas for better connecting mentors with mentees
- Any resources that would help you contribute more effectively

Your insights will directly shape how we evolve our mentor support. When might work for a brief conversation this week?

4. Comprehensive Feedback Templates

Quarterly Experience Survey

Implementation: See full survey template in separate document

Distribution Strategy:

- Direct email with personalized message
- In-platform announcement with link
- Direct message to highly active members
- Follow-up reminder after 5 days

Incentive Options:

- Early access to new resources
- Recognition in community spotlight
- Entry into drawing for 1:1 with industry expert
- Community contribution badge

Focus Group Discussion Guide

Implementation: Quarterly with 5-8 members from specific segments

Invitation Template:

Subject: Invitation to Help Shape PM Mentality's Future

Hi [Name],

Your perspectives as a [role/experience level] in our community are incredibly valuable, and I'd like to invite you to part

Details:

- Date: [Date]
- Time: [Time] ([Time Zone])
- Format: [Platform] video call
- Duration: 60 minutes
- Participants: 5-8 fellow members with diverse perspectives

What we'll discuss:

- Your community experience and how it supports your PM journey
- Specific ways we can improve our resources and interactions
- Ideas for new initiatives that would provide greater value
- How we can better connect members with complementary needs/expertise

As a thank you for your time, we'll [incentive details].

Can you join us? Please let me know by [deadline], and I'll send the calendar invitation with connection details.

Looking forward to your insights!

[Your Name]

Focus Group Structure:

1. Welcome and introductions (10 min)
 - Facilitator introduction
 - Participant introductions (name, role, how long in community)
 - Session purpose and ground rules
2. Current experience discussion (15 min)
 - What's working well
 - What's not meeting expectations
 - Specific examples of value received
3. Future-focused ideation (20 min)
 - Gaps in current offerings
 - Ideas for new initiatives
 - Prioritization discussion
4. Connection and community discussion (10 min)
 - Current relationship building experience
 - Barriers to meaningful connections
 - Ideas for better facilitating relationships
5. Wrap-up and next steps (5 min)
 - Summary of key insights
 - How feedback will be used
 - Timeline for implementation

5. Exit & Inactivity Feedback Templates

Declining Engagement Follow-up

Implementation: Triggered when previously active member shows 30 days of decreased activity

Subject: We've missed seeing you in PM Mentality

Hi [Name],

I noticed you've been less active in PM Mentality recently, and I wanted to check in. Your contributions have been valuable

I'd appreciate understanding if there's a reason for the change:

- Has your availability or work situation changed?
- Is the community still addressing your current PM needs?
- Have you found the recent content/discussions less relevant?
- Is there something specific that could better support you right now?

Even a quick one-line response would be helpful as we work to make the community valuable for all members.

If you'd prefer a quick chat instead, I'm happy to connect briefly via [platform].

Thanks for being part of PM Mentality,

[Your Name]

Formal Exit Survey

Implementation: Sent when member formally leaves or after 90 days of inactivity

Subject: Your PM Mentality Experience - Brief Feedback Request

Hi [Name],

We noticed you've [left our community/been inactive for some time] and would value understanding your experience to help us

If you could take just 2 minutes to share your thoughts, it would be incredibly helpful:

1. What initially brought you to PM Mentality?
[text field]

2. What best describes your reason for leaving/becoming less active?
- I got what I needed and moved on
 - My professional focus has changed
 - The content wasn't relevant to my needs
 - The community dynamic wasn't what I expected
 - Time constraints prevented participation
 - Found another resource that better met my needs
 - Other: [text field]
3. What one change would have made the community more valuable for you?
[text field]
4. Is there anything else you'd like us to know?
[text field]

Thank you for your time. Your feedback will directly inform how we evolve the community.

All the best with your PM journey,

[Your Name]

Feedback Analysis Framework

Weekly Synthesis Process

1. Collection & Categorization

- Gather all feedback from the week across all channels
- Tag by source, feedback type, topic area, and sentiment
- Identify member segment associated with each feedback point

2. Pattern Identification

- Group similar feedback points
- Identify emerging trends vs. one-off comments
- Note patterns specific to member segments

3. Impact Assessment

- Evaluate each feedback theme for:
 - How many members it affects
 - Potential impact on engagement if addressed
 - Resources required to address
 - Alignment with community goals

4. Action Planning

- Categorize feedback as:
 - Quick wins (implement immediately)
 - Strategic initiatives (plan for implementation)
 - Long-term considerations (further investigation needed)
 - Outside current scope (document but defer)

5. Closing the Loop

- Document feedback received and actions taken
- Communicate changes made based on feedback
- Acknowledge contributors whose feedback led to changes

Monthly Feedback Report Template

```
# PM Mentality Feedback Insights: [Month]

## Key Metrics
- Total feedback points collected: [#]
- Sources: [Breakdown by channel]
- Sentiment distribution: [Positive/Neutral/Negative percentages]
- Member segments represented: [Breakdown by segment]

## Top Themes

### Theme 1: [Title]
- Frequency: [# of mentions]
- Key quote: "[Representative feedback]"
- Member segments: [Which groups mentioned this most]
- Sentiment: [Positive/Neutral/Negative]
- Potential impact: [High/Medium/Low]
- Recommended action: [Specific next steps]

### Theme 2: [Title]
[Same structure]

### Theme 3: [Title]
[Same structure]

## Implementation Updates

### Actions Completed This Month
```


- [Action taken] in response to [feedback theme]
- [Action taken] in response to [feedback theme]

In Progress

- [Action] - Targeted completion: [date]
- [Action] - Targeted completion: [date]

Planned for Next Month

- [Action] in response to [feedback theme]
- [Action] in response to [feedback theme]

Closing the Loop

- Feedback acknowledgments sent to [# members]
- Public updates communicated via [channels]
- Next comprehensive survey planned for [date]

5. Feedback Collection Templates (Continued)

In-Depth Member Interview Guide

Purpose: Gain deeper qualitative insights from members to inform strategic decisions

Pre-Interview Communication

Channel: Direct Message or Email

Subject: Invitation: Help shape PM Mentality through a 20-min conversation

Hi [Name],

Your perspective as a [specific description: "active mentor," "new member," etc.] in our PM Mentality community is incredib

Why you? Your engagement with [specific aspect of community] gives you a unique viewpoint that can help us enhance the expe

What we'll discuss:

- Your PM journey and how the community fits into it
- What's working well for you and what could be improved
- Specific ideas you might have for new resources or features

You can book a time that works for you here: [Calendly link]

Your candid feedback will directly inform our roadmap for the next quarter, helping ensure PM Mentality delivers exactly wh

Thank you for considering this invitation!

[Your Name]

Interview Question Framework

Opening (2 minutes):

- "Thanks so much for making time for this conversation. Before we dive in, do you have any questions about how we'll use your feedback?"
- "Just to set expectations, I'll be taking notes, and your insights will be summarized along with other member feedback to identify patterns, but no direct quotes will be attributed to you without permission."

Journey & Context (5 minutes):

1. "Could you briefly tell me about your project management journey and what prompted you to join PM Mentality?"
2. "What were you hoping to gain from the community when you joined? How has that evolved?"
3. "How does PM Mentality fit into your professional development routine?"

Experience Deep-Dive (7 minutes):

1. "Thinking about your experience so far, what aspects of the community have been most valuable to you?"
2. "What's one thing that has surprised you (positively or negatively) about the community?"
3. "If you could change or improve one thing about PM Mentality, what would it be and why?"
4. "Are there any specific challenges in your PM work that the community isn't currently helping you address?"

Future-Focused (5 minutes):

1. "What types of resources or interactions would make PM Mentality even more valuable to your professional growth?"
2. "How do you see your participation in the community evolving over the next 6-12 months?"
3. "If we were to introduce one new feature or type of content, what would you find most beneficial?"

Closing (1 minute):

- "Is there anything else you'd like to share that I haven't asked about?"
- "Thank you so much for your insights. They'll be incredibly helpful as we continue to evolve the community."
- "Would it be alright if I reached out with any follow-up questions? And would you be interested in hearing about changes we implement based on this feedback?"

Post-Interview Thank You

Channel: Email or Direct Message

Subject: Thank you for sharing your PM Mentality insights

Hi [Name],

I wanted to extend my sincere thanks for taking the time to share your perspectives on PM Mentality today. Your insights ab

A few key takeaways I noted from our conversation:

- [Specific insight they shared]
- [Another point they emphasized]
- [A need or opportunity they identified]

We're collecting feedback from several members this month, and will be incorporating these insights into our planning for [

If any additional thoughts come to mind, please don't hesitate to share them with me directly.

Thanks again for helping us build a stronger PM Mentality community!

[Your Name]

Focused Feedback Campaign Templates

Feature-Specific Feedback

Channel: Direct to Recent Users

Subject: Your thoughts on [specific feature]?

Hi [Name],

I noticed you've recently engaged with our [specific feature/resource/event], and I'd love to get your quick take on it whi

□ **60-Second Feedback**

1. On a scale of 1-5, how useful was this [feature] for you? [1□2□3□4□5□]

2. What was the most valuable aspect? [Short answer]

3. One thing that would make it even better? [Short answer]

Your input helps us refine our resources to better serve your PM needs. We're particularly focused on improving [specific a

Thanks for being part of making PM Mentality better!

[Your Name]

Exit Survey Template

Channel: Email

Subject: We'd value your feedback as you leave PM Mentality

Hi [Name],

We've noticed you're no longer active in the PM Mentality community, and while we're sad to see you go, we respect your dec

If you could take just 2 minutes to answer a few questions, it would be greatly appreciated:

1. What initially attracted you to PM Mentality?
[Short answer field]

2. What factors influenced your decision to step away?
[] Time constraints
[] Content not relevant to my needs
[] Community dynamic not what I expected
[] Found alternative resources elsewhere
[] Professional circumstances changed
[] Other: _____

3. Is there anything we could have done differently that would have made PM Mentality more valuable for you?
[Short answer field]

4. Would you consider rejoining if specific changes were made?
[] Yes
[] No
[] Maybe

Thank you for your time with us, and for any insights you're willing to share. Regardless of your feedback, we wish you all

[Your Name]

Topic Interest Survey

Channel: Community-Wide

Subject: Help shape our upcoming content focus

□ **QUICK CONTENT POLL**

We're planning our resource development calendar for the next quarter, and want to focus on what matters most to YOU.

Which PM topics would you most value deeper resources on?
(Select up to 3)

- [] Risk management strategies
- [] Stakeholder communication techniques
- [] Agile implementation in traditional environments

[] Resource allocation optimization
[] Remote team management
[] PM tool configuration and workflows
[] Career progression and certification
[] Metrics and reporting frameworks
[] Other: _____

****What format works best for your learning style?****

[] Comprehensive guides
[] Template collections
[] Case studies
[] Quick reference tools
[] Interactive workshops
[] Peer discussion threads
[] Expert interviews
[] Other: _____

Your input directly determines what we prioritize next. Thanks for guiding our focus!

Poll closes: [Date]

Ongoing Feedback Systems

Weekly Pulse Check

Channel: Rotating Channel Each Week

Subject: Friday Pulse Check: This week in PM Mentality

Happy Friday, PM community! ☐

As we wrap up another week, I'd love to get your quick thoughts:

****This week's highlights:****

- [Community achievement/milestone]
- [Popular discussion or resource]
- [Upcoming opportunity]

****Quick reflection questions:****

1☐ What was the most useful thing you encountered in the community this week?

2☐ Any challenges or questions that remain unresolved?

3☐ One word to describe your PM Mentality experience this week?

These weekly check-ins help us stay responsive to your needs. Even a quick emoji reaction helps!

Have a productive weekend,
[Your Name]

Feedback Collection Board

Channel: Dedicated Feedback Channel

Subject: Continuous Improvement Board - Share Your Ideas

☐ ****PINNED: CONTINUOUS IMPROVEMENT BOARD****

This is our always-open space for community suggestions and feedback. Your input directly shapes PM Mentality!

****How to participate:****

☐ ****Share an idea**** by commenting with "IDEA: [your suggestion]"

Example: "IDEA: Create a resource library section specifically for stakeholder templates"

☐ ****Upvote existing ideas**** that resonate with you by adding a ☐ reaction

☐ ****Submit feedback**** by commenting with "FEEDBACK: [your experience]"

Example: "FEEDBACK: The mentor matching process was smooth, but I'd appreciate more guidance on setting expectations"

Every two weeks, we review all submissions and will update this thread with actions we're taking based on your input.

Currently working on:

- [Current improvement initiative]
- [Current improvement initiative]
- [Current improvement initiative]

Recently implemented based on your feedback:

- [Completed improvement]
- [Completed improvement]

Thank you for helping us build a better PM Mentality community together!

Targeted Improvement Request

Channel: Direct Message or Specific Channel

Subject: Help us improve [specific aspect]

Hi [Name/Channel],

We're currently focusing on enhancing our [specific aspect: onboarding process, resource organization, mentorship program,

****What we're trying to improve:****
[Brief explanation of current state and why improvement matters]

****Quick questions:****

1. What currently works well about our [specific aspect]?
2. What's your biggest friction point or challenge with it?
3. If you could wave a magic wand and change one thing about this, what would it be?
4. Any examples you've seen elsewhere that we might learn from?

Your practical experience with this aspect of our community makes your perspective essential. Even a sentence or two would
We'll be collecting feedback until [date] and will share our action plan by [date].

Thank you for contributing to our improvement!

[Your Name]

6. Member Success & Recognition Templates

Achievement Recognition

Channel: Community-Wide + Direct Message

Subject: Celebrating [Name]'s PM Success!

□ ****MEMBER SPOTLIGHT****

Join me in celebrating @[Member Name]'s recent achievement!

[Name] recently [specific accomplishment: completed certification, delivered successful project, reached milestone, shared

In their own words:

"[Brief quote from member about their experience/achievement]"

[Name] has been contributing to our community by [specific contributions: sharing insights, helping others, creating resour

Want to wish [Name] congratulations? Drop a comment below!

#MemberSpotlight #PMSuccess

Personal Congratulations Note

Channel: Direct Message

Subject: Congratulations on your [specific achievement]!

Hi [Name],

I just heard about your [specific achievement], and wanted to personally congratulate you! This is an impressive accomplish

Our entire community benefits from having committed professionals like you who [specific value they bring]. I particularly

Would you be comfortable with me highlighting this achievement in our community channels? It could inspire other members an

Also, I'd love to hear more about how this achievement connects to your broader professional goals, if you're open to shari

Congratulations again!

[Your Name]

Contribution Recognition

Channel: Community-Wide + Direct Message

Subject: Thank you, [Name], for elevating our community!

□ ****COMMUNITY CHAMPION****

This week, we want to recognize @[Member Name] for their outstanding contributions to PM Mentality!

[Name] has consistently [specific contributions: answered questions, shared resources, provided thoughtful feedback, etc.]

****Impact highlights:****

- [Specific example of impact]
- [Another example or quantifiable contribution]
- [Member testimonial if available]

These contributions embody our community values of [relevant values] and help make PM Mentality a place where everyone can

Thank you, [Name], for all you do to elevate our community!

#CommunityChampion #MemberAppreciation

Impact Documentation

Channel: Direct Message

Subject: The impact you're making in PM Mentality

Hi [Name],

I wanted to take a moment to share the impact your contributions are making in our community:

- Your [specific contribution] has helped [number] members with [specific challenge]
- The [resource/insight] you shared has become one of our most [referenced/saved/discussed] resources
- Several members have specifically mentioned how your [approach/support/content] has helped them, including:

"[Quote from member]" - @MemberName

This kind of contribution directly supports our mission to [community mission statement] and creates real value for PM prof

Is there anything I can do to support your continued engagement or make your experience in the community even better?

With sincere appreciation,

[Your Name]

Milestone Celebrations

Channel: Community-Wide
Subject: Celebrating [X months/years] with PM Mentality!

□ ****MILESTONE CELEBRATION****

Today marks an important milestone for our community members who joined us [timeframe] ago!

****Celebrating:****
[Tag members celebrating milestone]

In the past [timeframe], these members have:

- Participated in [number] discussions
- Contributed [number] resources
- Supported countless peers
- Grown their PM capabilities

****Member Reflections:****
[Name]: "[Brief quote about their experience]"
[Name]: "[Brief quote about their experience]"

What's been your most valuable takeaway from PM Mentality so far? Share in the comments!

Thank you for being part of our community journey!

#PMGrowth #CommunityMilestone

Personal Milestone Recognition

Channel: Direct Message
Subject: Happy [X] Month/Year Anniversary with PM Mentality!

Hi [Name],

Today marks [X months/years] since you joined our PM Mentality community - what a journey it's been!

I've personally noticed how you've [specific observation about their growth or contribution]. Your presence has enriched ou

Looking back:

- You've engaged with [specific metrics if available]
- You've helped others by [specific contributions]
- You've grown in [observed areas of development]

I'd love to hear: What's been most valuable about PM Mentality for you? And what would you like to gain from the community

Thanks for being an important part of what makes this community special.

Here's to many more productive conversations ahead!

[Your Name]

7. Community Culture & Values Templates

Culture Reinforcement

Channel: Community-Wide
Subject: Our PM Mentality Values in Action

□ ****COMMUNITY VALUES SPOTLIGHT****

This week, I've been reflecting on our core value of [specific value], which means [brief description of what the value rep

****I've seen this value beautifully demonstrated through:****

- @MemberName showing [value] by [specific example]
- The thoughtful discussion in [channel/thread] where members [specific behavior]
- How our community responded to [situation/challenge] with [value-aligned behavior]

These moments aren't just nice to see—they're what make PM Mentality a uniquely supportive space for professional growth.

****Question for reflection:**** How has embodying this value helped you in your broader PM practice beyond our community?

Share your thoughts below, or an example of how you've seen this value in action recently!

#CommunityValues #[ValueName]

Values Integration Message

Channel: New Member Onboarding Material

Subject: The PM Mentality Difference: Our Community Values

Welcome to PM Mentality!

What makes our community special isn't just what we discuss, but how we engage with each other. Our community values guide

□ ****Supportive Growth****

We believe the best learning happens when we lift each other up. This means:

- Constructive feedback focused on improvement
- Celebrating wins of all sizes
- Meeting members where they are in their PM journey

□ ****Curious Mindset****

We embrace continuous learning and thoughtful questioning:

- Asking "why" and "how" rather than just "what"
- Sharing perspectives across methodologies and industries
- Challenging assumptions respectfully

□ ****Ambitious Application****

We focus on practical impact and real-world results:

- Translating concepts into actionable steps
- Sharing both successes and failures as learning opportunities
- Holding each other accountable to meaningful goals

You'll see these values in action throughout our channels, events, and resources. We invite you to both embrace and help sh

Have questions about how these values play out in specific situations? Feel free to ask me directly anytime.

Behavior Modeling

Channel: Community-Wide or Specific Channel

Subject: How we handle [specific situation] in PM Mentality

□ ****COMMUNITY PRACTICE SPOTLIGHT****

I've noticed several questions about how to approach [specific situation: disagreements, knowledge gaps, sensitive topics,

****Our approach to [situation]:****

□ ****What works well:****

- [Specific constructive approach]
- [Specific constructive approach]
- [Specific constructive approach]

Example: [Brief scenario demonstrating positive approach]

□ ****What we avoid:****

- [Approach that doesn't align with values]
- [Approach that doesn't align with values]
- [Approach that doesn't align with values]

****Why this matters:****

[Brief explanation of how this approach supports community goals and individual growth]

I've been particularly impressed by how @MemberName and @MemberName have exemplified this recently in [specific example if

Questions about navigating this or other community dynamics? Feel free to ask here or message me directly.

#CommunityGuidelines #ProfessionalGrowth

Constructive Resolution Template

Channel: Direct Message or Private Thread

Subject: Following up on [specific situation]

Hi [Name],

I wanted to reach out regarding the recent [discussion/interaction] in [channel/thread]. First, I want to thank you for you

I noticed that the conversation [specific observation about what happened], and wanted to check in. In PM Mentality, we str

Some thoughts on how we might approach this productively:

- [Specific suggestion]
- [Specific suggestion]
- [Specific suggestion]

My role is to ensure everyone feels both challenged to grow AND supported in that process. What are your thoughts on how we

I'm happy to discuss this further if you'd like—my goal is always to maintain the positive, growth-focused culture that mak

[Your Name]

8. Program Development Templates

Needs Assessment

Channel: Community-Wide Survey or Targeted Segments

Subject: Help shape our upcoming [program/initiative]

□ **PROGRAM DEVELOPMENT SURVEY**

We're developing a new [program/initiative] focused on [specific area], and your input will directly shape what we create!

Quick Background:

We've observed [specific need/trend] in our community, and want to ensure we're addressing it effectively.

Please share your thoughts:

1. How important is [specific area] to your PM work? (Scale 1-5)

2. What specific challenges do you face with [area]?

[] [Common challenge]

[] [Common challenge]

[] [Common challenge]

[] [Common challenge]

[] Other: _____

3. What would make a [program/initiative] on this topic truly valuable to you?

[Short answer]

4. How would you prefer to engage with this content?

[] Self-paced resources

[] Guided cohort experience

[] Live workshops

[] Peer accountability groups

[] Expert Q&A sessions

[] Other: _____

5. Would you be interested in contributing to this initiative as a [content reviewer/subject matter expert/discussion leader]?

[] Yes

[] No

[] Maybe, tell me more

Survey closes: [Date]

We'll share what we learn and our program plan by: [Date]

#CommunityInput #ProgramDevelopment

Program Launch Announcement

Channel: Community-Wide + Targeted Outreach

Subject: Introducing: [Program Name] - Developed with YOUR input

□ **LAUNCHING: [PROGRAM NAME]**

Today, we're excited to introduce [Program Name], a new initiative designed with direct input from community members like you.

What it is:

[Program Name] is a [brief description] designed to help you [specific benefit].

How we created it:

- Started with feedback from [number] community members
- Identified key needs around [specific challenges]
- Developed and tested with a pilot group
- Refined based on implementation feedback

What you'll gain:

- [Specific benefit]
- [Specific benefit]
- [Specific benefit]

How to participate:

[Clear next steps with links]

Timeline:

[Key dates and deadlines]

Special thanks to @Member1, @Member2, and @Member3 who contributed valuable insights during development!

Questions? Drop them below or DM me directly.

#NewProgram #[ProgramHashtag]

Program Feedback Collection

Channel: Program Participants

Subject: Your thoughts on [Program Name]?

Hi [Name],

Now that you've experienced [Program Name], your feedback is crucial to help us refine and improve it for future participants.

****Quick Reflection Questions:****

1. Overall, how valuable was this program to your PM development? (Scale 1-5)
2. What aspect of the program was MOST valuable to you?
[Short answer]
3. What aspect was LEAST valuable or could be improved?
[Short answer]
4. Have you been able to apply what you learned? If so, how?
[Short answer]
5. Would you recommend this program to other community members?
[] Definitely
[] Probably
[] Not sure
[] Probably not
[] Definitely not
6. Any additional suggestions for improvement?
[Short answer]

Your honest feedback helps us create truly impactful programming. All responses will be reviewed carefully as we plan future

Thank you for being part of this journey!

[Your Name]

9. Crisis & Sensitive Situation Templates

Issue Response

Channel: Affected Area + Direct to Involved Parties

Subject: Addressing recent concerns about [topic/situation]

Hi everyone,

I want to address the recent [discussion/situation] regarding [brief, neutral description].

First, thank you to those who brought this to our attention. Open communication helps us maintain a community that works for

****What happened:****

[Factual, neutral summary without assigning blame]

****Our approach:****

At PM Mentality, we're committed to [relevant community value/guideline]. In this situation, we're taking the following steps

1. [Specific action being taken]
2. [Specific action being taken]
3. [Specific action being taken]

****Moving forward:****

To prevent similar situations, we'll be [preventative measure]. We also welcome your suggestions on how we can better [address]

If you have concerns or questions about this or any community matter, please don't hesitate to reach out to me directly.

Thank you for your understanding and continued engagement in making PM Mentality a valuable space for everyone.

[Your Name]

Private Follow-Up

Channel: Direct Message

Subject: Following up on recent situation

Hi [Name],

I wanted to check in with you personally regarding the recent [situation] in our community. Your experience and perspective

First, I want to thank you for [positive action they took: raising concern, showing patience, offering solution, etc.].

I understand this situation may have been [challenging/frustrating/concerning], and I want to ensure you feel heard and supported

- [Specific action taken]
- [Specific action taken]
- [Specific action taken]

Is there anything else you feel would help resolve this situation more effectively? Or anything I might have missed in understanding

Our goal is always to maintain PM Mentality as a space where everyone can grow professionally in a supportive environment.

I'm available to discuss this further if you'd find that helpful.

[Your Name]

Community Announcement Templates

Important Update

Channel: Community-Wide

Subject: Important Update: Changes to [specific aspect]

□ ****IMPORTANT COMMUNITY UPDATE****

I'm writing to share an important update regarding [specific aspect of community].

****What's changing:****

[Clear explanation of the change]

****Why this change is happening:****

[Transparent reasoning, connecting to member needs or community goals]

****How this affects you:****

[Specific impacts on different member segments if applicable]

****Timeline:****

- [Date]: [Milestone]
- [Date]: [Milestone]
- [Date]: [Full implementation]

****What you need to do:****

[Clear action steps if any are required]

****Resources to help:****

- [Resource/Guide link]
- [FAQ link]
- [Support option]

We understand changes can sometimes be disruptive. If you have questions or concerns, please [specific way to provide feedback].

Thank you for your understanding and continued engagement in our community.

[Your Name]

New Feature or Opportunity

Channel: Community-Wide + Targeted to Relevant Segments

Subject: New: [Feature/Opportunity] Now Available!

□ ****NEW FOR PM MENTALITY MEMBERS****

We're excited to announce the addition of [new feature/opportunity/benefit] to our community!

****What it is:****

[Clear description with visual if applicable]

****Key benefits for you:****

- [Specific benefit]
- [Specific benefit]
- [Specific benefit]

****Why we added this:****

This addition directly addresses feedback from members who requested [specific need addressed].

****How to access/participate:****

[Clear step-by-step instructions with links]

****Expert tip:****

[Insider advice on getting the most value]

This enhancement is part of our ongoing commitment to [relevant community goal/value].

Questions about how to leverage this new [feature/opportunity]? Ask below!

#CommunityEnhancement #NewFeature

Event Promotion Template

Channel: Community-Wide + Calendar Integration

Subject: Join us: [Event Name] with [Speaker/Host] - [Date]

□ ****UPCOMING EVENT: [EVENT NAME]****

Mark your calendars for an exclusive opportunity to [learn from/engage with/master] [topic/skill]!

****Event Details:****

- Date: [Day, Date]
- Time: [Time] ([Alternative timezone])
- Location: [Platform with link]
- Registration: [Process/link]

****What you'll gain:****

- [Specific takeaway]
- [Specific takeaway]
- [Specific takeaway]

****About [Speaker/Host]:****

[Brief but impressive bio highlighting relevant expertise]

****Format:****

[What to expect: presentation structure, interactive elements, Q&A, etc.]

****Ideal for members who:****

- Are working on [specific challenge]
- Want to develop [specific skill]
- Need insights on [specific topic]

****Preparation suggested:****

[Any pre-work or thought questions to consider]

Space is limited to [number] participants to ensure quality interaction!

****RSVP by:**** [Date]

#CommunityEvent #[TopicHashtag]

PM Mentality Community Feedback Survey

Introduction Section

Thank you for being part of the PM Mentality community. This survey will take approximately 5-7 minutes to complete and will help us create the most valuable experience possible for you and your project management journey.

Your honest feedback is incredibly valuable to us. All responses are confidential and will be used to improve our community offerings.

Community Experience

1. Overall, how satisfied are you with your PM Mentality community experience?

- Extremely satisfied
- Very satisfied
- Somewhat satisfied
- Not very satisfied
- Not at all satisfied

2. How likely are you to recommend PM Mentality to a colleague or friend?

- 0-10 scale (0 = Not at all likely, 10 = Extremely likely)

3. How often do you engage with the PM Mentality community?

- Daily
- Several times a week
- About once a week
- A few times a month
- Monthly or less
- I haven't engaged yet

4. What typically prevents you from engaging more frequently? (Select all that apply)

- Time constraints
- Content doesn't always meet my needs
- I'm not sure where or how to contribute
- Lack of responses to my contributions
- Platform navigation challenges
- Nothing - my current engagement level works for me
- Other (please specify): _____

Content & Resources

5. Which content formats do you find most valuable? (Rank from most to least valuable)

- Written guides and templates
- Interactive workshops/webinars
- Discussion threads on specific topics
- Q&A sessions with mentors
- Peer case studies and examples
- Structured courses or learning paths
- Other (please specify): _____

6. Which project management topics are you most interested in learning about? (Select up to 3)

- Agile methodologies
- Traditional/Waterfall approaches
- Hybrid methodologies
- Team leadership and management
- Stakeholder communication
- Risk management
- Resource planning and allocation
- PM tools and technology
- Career development and advancement
- Industry-specific PM approaches
- Other (please specify): _____

7. How would you rate the quality of our community resources?

- Excellent
- Very good
- Good
- Fair
- Poor

8. What specific resources or content would you like to see that we don't currently offer?

- [Open text field]

Community Interactions

9. How would you describe the community culture? (Select all that apply)

- Supportive
- Knowledgeable
- Responsive
- Welcoming
- Diverse
- Engaging
- Challenging (in a positive way)
- Intimidating
- Slow to respond
- Cliquish
- Other (please specify): _____

10. How useful have interactions with other community members been for your PM growth?

- Extremely useful
- Very useful
- Somewhat useful
- Not very useful
- Not at all useful
- I haven't interacted with other members yet

11. What would make community interactions more valuable for you?

- [Open text field]

Platform Experience

12. How easy is it to find what you need within our community platforms?

- Extremely easy
- Very easy
- Somewhat easy
- Not very easy
- Not at all easy

13. Which platforms do you most frequently use to engage with the community? (Select all that apply)

- Slack
- Discord
- LinkedIn
- Coda
- Trello
- Other (please specify): _____

14. What specific improvements to our platforms would enhance your experience?

- [Open text field]

Personal Value & Growth

15. What specific PM skills have you improved through your participation in this community?

- [Open text field]

16. What is the primary value you get from the PM Mentality community?

- Professional networking
- Learning new PM approaches and skills
- Finding solutions to specific work challenges
- Validating my current PM practices
- Career advancement opportunities
- Mentor/mentee relationships
- Other (please specify): _____

17. What additional value would you like to receive that you're not getting currently?

- [Open text field]

Future Directions

18. Which of the following initiatives would you like to see us implement? (Select all that interest you)

- Structured mentorship program
- Certification study groups
- Industry-specific PM discussions
- Project showcases from members
- Career development workshops
- Tool-specific training
- Regular virtual networking events
- Community challenges/hackathons
- Other (please specify): _____

19. How can we better support your specific PM career stage and goals?

- [Open text field]

Final Thoughts

20. If you could change one thing about the PM Mentality community, what would it be?

- [Open text field]

21. Is there anything else you'd like to share about your community experience?

- [Open text field]

Demographic Questions (Optional)

22. How long have you been a member of the PM Mentality community?

- Less than 1 month
- 1-3 months
- 4-6 months
- 7-12 months
- Over 1 year

23. Which best describes your current PM experience level?

- New to project management (0-1 years)
- Early career (2-3 years)
- Mid-level (4-7 years)
- Experienced (8-15 years)
- Senior/leadership level (15+ years)

24. Which industry do you primarily work in?

- Technology/Software
- Financial Services
- Healthcare
- Manufacturing
- Construction
- Education
- Government
- Consulting
- Other (please specify): _____

Thank you for taking the time to provide your feedback! Your insights will directly inform our community improvements.

PM Mentality Member Onboarding Workflow

Onboarding Journey Map

Pre-Onboarding Phase

Objective: Set clear expectations and build excitement before official welcome

Touchpoint	Channel	Owner	Goal	Content	Timing
Confirmation Email	Email	Auto/System	Confirm registration & set expectations	Welcome message, what to expect, immediate access instructions	Immediately after signup
Welcome Guide	PDF/Doc	Community Lead	Provide comprehensive overview	Community purpose, platforms, benefits, getting started guide	Attached to confirmation email

Touchpoint	Channel	Owner	Goal	Content	Timing
Quick Start Checklist	PDF/Doc	Community Lead	Provide clear first steps	Top 3-5 actions to take immediately	Attached to confirmation email

Day 1: Welcome & Orientation

Objective: Make new member feel personally welcomed and help them take first engagement steps

Touchpoint	Channel	Owner	Goal	Content	Timing
Personal Welcome	Direct Message	Engagement Specialist	Establish human connection	Personalized welcome, offer to answer questions	Within 24 hours of joining
Platform Tour	System Message or Video	Auto/System	Orient to digital environment	Navigation guidance, feature highlights	Triggered after first login
Introduction Prompt	Community Channel	Engagement Specialist	Facilitate first engagement	Template for self-introduction, encouragement to post	Day 1
Resource Orientation	Direct Message	Engagement Specialist	Direct to initial resources	Personalized recommendations based on stated interests	Day 1

Days 2-7: First Engagement

Objective: Guide new member to meaningful interactions and value realization

Touchpoint	Channel	Owner	Goal	Content	Timing
Introduction Follow-up	Community Channel	Engagement Specialist	Acknowledge their introduction	Welcome response, specific follow-up question, tag relevant members	Within 24 hours of introduction
First Check-in	Direct Message	Engagement Specialist	Address questions, provide guidance	Quick check on experience, address any confusion	Day 3
Resource Recommendation	Direct Message	Engagement Specialist	Drive resource utilization	Personalized content based on stated interests	Day 5
Engagement Prompt	Direct Message	Engagement Specialist	Encourage specific participation	Suggestion to join specific discussion, event, or resource	Day 7

Days 8-30: Deepening Engagement

Objective: Transform from newcomer to active participant with connection to community

Touchpoint	Channel	Owner	Goal	Content	Timing
Connection Suggestions	Direct Message	Engagement Specialist	Facilitate peer relationships	Introduction to 2-3 members with similar interests	Day 10-14
Feedback Check	Direct Message	Engagement Specialist	Gather early experience data	Quick 3-question check on experience so far	Day 14
Value Highlight	Direct Message	Engagement Specialist	Reinforce benefits	Spotlight specific resource/conversation relevant to their needs	Day 21
Contribution Invitation	Direct Message	Engagement Specialist	Encourage active participation	Specific invitation to contribute expertise/insight	Day 25-30
Month 1 Milestone	Direct Message	Engagement Specialist	Celebrate participation	Acknowledgment of 1-month mark, recap engagement, suggest next steps	Day 30

Month 2: Path to Core Membership

Objective: Transition from guided experience to self-directed engagement and deeper contribution

Touchpoint	Channel	Owner	Goal	Content	Timing
Deeper Engagement Option	Direct Message	Engagement Specialist	Suggest meaningful participation	Specific role or contribution opportunity	Week 5-6
Expertise Identification	Direct Message	Engagement Specialist	Recognize unique value	Acknowledgment of specific expertise, suggestion for sharing	Week 6-7
Structured Feedback	Survey	Engagement Specialist	Gather comprehensive feedback	Formal onboarding experience survey	End of Month 2

Onboarding Workflow Implementation

1. Automate Where Valuable (Not Everywhere)

System-Based Automations:

- Confirmation email with welcome guide
- Platform feature introduction messages
- Scheduled check-in reminders for Engagement Specialist
- Membership milestone acknowledgments

Keep Human Touch For:

- Personal welcome messages

- Follow-up on introductions
- Custom resource recommendations
- Connection facilitation

2. Personalization Framework

Data Collection Points:

- Initial signup form: Role, experience level, primary interests
- Introduction post: Background, goals, challenges
- Early engagement patterns: Content types, discussion topics
- Direct feedback from check-ins

Personalization Application:

- Resource recommendations based on stated interests and role
- Connection suggestions based on experience level and goals
- Engagement prompts aligned with observed platform preferences
- Contribution invitations matching expertise areas

3. Success Metrics Tracking

Individual Member Level:

- Days to first engagement post-signup
- Platform navigation completeness
- Resource utilization in first 30 days
- Connection formation (interactions with other members)
- Progression to contribution activities

Program Level:

- Percentage completing full onboarding journey
- Average time to first meaningful contribution
- Correlation between onboarding completion and retention
- Resource discovery effectiveness
- Connection formation rate

4. Feedback Collection Framework

Feedback Sources:

- Quick pulse checks at days 3, 14, 30
- Direct question during check-ins
- Observation of engagement patterns
- Formal survey at end of onboarding period

Key Questions to Address:

- Was the pace of introduction appropriate?
- Which resources were most/least valuable?
- Were connection suggestions relevant?
- What questions remain unanswered?
- What would have improved the experience?

Onboarding Intervention Triggers

Low Engagement Interventions

Trigger: No platform login within 3 days of signup

- **Action:** Send follow-up email highlighting specific valuable content
- **Owner:** System + Engagement Specialist
- **Content:** "We noticed you haven't had a chance to explore PM Mentality yet. Here's what you're missing..." with specific content highlights

Trigger: No introduction post within 5 days

- **Action:** Send simplified introduction template
- **Owner:** Engagement Specialist
- **Content:** "We'd love to know who you are! Even a quick hello helps us connect you with the right people."

Trigger: No engagement with recommended resources

- **Action:** Send alternative recommendations with different format
- **Owner:** Engagement Specialist
- **Content:** "Based on your interests in [topic], you might prefer this [alternative format] instead."

Confusion Interventions

Trigger: Navigation patterns show platform confusion

- **Action:** Offer 1:1 orientation call
- **Owner:** Engagement Specialist
- **Content:** "Would a quick 10-minute call to walk through our community setup be helpful?"

Trigger: Questions about where to find resources

- **Action:** Send customized platform guide
- **Owner:** Engagement Specialist
- **Content:** Visual guide with screenshots highlighting relevant sections

Interest Alignment Interventions

Trigger: Engagement doesn't align with stated interests

- **Action:** Interest recalibration conversation
- **Owner:** Engagement Specialist
- **Content:** "I noticed your initial interests were in ☐ , but you seem to be engaging with [Y]. Would you like more recommendations in that area instead?"

Onboarding Asset Checklist

Essential Documents

- ☐ Community Welcome Guide
- ☐ Platform Navigation Guide
- ☐ Resource Directory
- ☐ Introduction Template
- ☐ FAQ Document
- ☐ Community Guidelines
- ☐ Mentorship Program Overview (if applicable)

Engagement Specialist Tools

- ☐ Onboarding Tracker Sheet
- ☐ Message Template Library
- ☐ Member Interest Database
- ☐ Intervention Decision Tree
- ☐ Resource Recommendation Framework
- ☐ Connection Suggestion Process
- ☐ Feedback Collection Templates

Let me break down these three crucial UX research phases in more detail:

Gather User Data

This foundational step helps you understand who your users really are and what they need:

- **Surveys:** Create targeted questionnaires to collect quantitative data about user preferences, pain points, and goals
- **Interviews:** Conduct one-on-one conversations to get qualitative insights and stories
- **Observation sessions:** Watch users interact with your product or similar solutions
- **Analytics review:** Examine existing usage data to identify patterns and problem areas
- **Competitive analysis:** Research how other products solve similar problems

The key is collecting both quantitative data (what users do) and qualitative insights (why they do it). Just like in the mentor-mentee process, you want to understand communication styles, goals, and working preferences.

Create User Personas

Transform your research into representative character profiles:

- Develop 3-5 distinct personas that represent your core user segments
- Include demographics, goals, frustrations, motivations, and tech comfort
- Add quotes and backstories to make them feel real to your team
- Prioritize personas based on business goals and user needs
- Use these personas to guide all design decisions

Personas help your team build empathy and make consistent decisions. They're similar to how you categorized mentors and mentees based on traits like risk approach and communication style.

Map User Journeys

Document the paths users take when interacting with your product:

- Start with the user's goal and initial touchpoint
- Map each step they take toward accomplishing their objective
- Note emotions, questions, and pain points at each stage

- Identify moments where users might abandon the process
- Include all channels and touchpoints (not just digital interfaces)

Journey maps visualize the entire experience, helping you spot where friction occurs. This is similar to your compatibility matrix approach, but focused on the user's path rather than matching.

Would you like me to expand on any of these phases or provide specific examples of techniques for gathering data, creating personas, or mapping journeys?

I'll help you create effective prompts and templates for collecting user data across all three areas. Here are practical templates you can use right away:

Survey Templates for User Data Collection

Quick User Needs Survey

1. What are you primarily trying to accomplish with [product/service]? (open-ended)
2. On a scale of 1-5, how easy is it to accomplish this task?
3. What is your biggest frustration when using [product/service]? (open-ended)
4. Which feature do you use most frequently?
5. What one change would most improve your experience?

User Context Questions

1. How often do you use [product/service]? (Multiple choice: Daily, Weekly, Monthly, Rarely)
2. Where do you typically use [product/service]? (Select all that apply)
3. What other tools do you use alongside [product/service]?
4. What is your role/job title?
5. What specific problem were you trying to solve when you decided to use [product/service]?

Interview Prompts for Deeper Insights

Experience Mapping Questions

- "Walk me through the last time you used [product/service]. What were you trying to do?"
- "What steps did you take to accomplish your goal?"
- "Where did you hesitate or feel unsure during the process?"
- "Was there anything surprising or unexpected about how things worked?"
- "If you could change one thing about this experience, what would it be?"

Behavior Understanding Prompts

- "In what situations do you find yourself needing [product/service]?"
- "How does this tool fit into your broader workflow or daily routine?"
- "What alternatives did you consider before choosing this solution?"
- "What would cause you to look for a different solution?"

User Persona Data Collection Template

Persona Development Worksheet

Demographics:

- Age range:
- Occupation:
- Technical proficiency (1-5):

Goals & Motivations:

- Primary goal when using our product:
- What success looks like to them:
- What motivates them to use our solution:

Pain Points & Frustrations:

- Current challenges:
- Workarounds they're using:
- What makes them abandon a task:

Behaviors & Preferences:

- When they typically use our product:
- Device preferences:
- Feature usage patterns:

Quote that captures their perspective:

User Journey Mapping Template

Journey Stage Documentation

For each stage in the user journey (Awareness, Consideration, Onboarding, etc.):

Stage: [Name]

User Actions:

- What is the user doing at this stage?
- What decisions are they making?

Touchpoints:

- What parts of your interface/product are they interacting with?
- What channels are they using?

Questions & Thoughts:

- What information does the user need?
- What might they be wondering?

Pain Points:

- What frustrations might occur?
- Where could they get stuck?

Emotions:

- How does the user feel at this stage?
- What's their satisfaction level (1-5)?

Opportunities:

- How could this stage be improved?
- What friction could be removed?

I'll help you create effective prompts and templates for collecting user data across all three areas. Here are practical templates you can use right away:

Survey Templates for User Data Collection

Quick User Needs Survey

1. What are you primarily trying to accomplish with [product/service]? (open-ended)
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5. What one change would most improve your experience?

User Context Questions

1. How often do you use [product/service]? (Multiple choice: Daily, Weekly, Monthly, Rarely)
2. Where do you typically use [product/service]? (Select all that apply)
3. What other tools do you use alongside [product/service]?
4. What is your role/job title?
5. What specific problem were you trying to solve when you decided to use [product/service]?

Interview Prompts for Deeper Insights

Experience Mapping Questions

- "Walk me through the last time you used [product/service]. What were you trying to do?"
- "What steps did you take to accomplish your goal?"
- "Where did you hesitate or feel unsure during the process?"
- "Was there anything surprising or unexpected about how things worked?"
- "If you could change one thing about this experience, what would it be?"

Behavior Understanding Prompts

- "In what situations do you find yourself needing [product/service]?"
- "How does this tool fit into your broader workflow or daily routine?"
- "What alternatives did you consider before choosing this solution?"
- "What would cause you to look for a different solution?"

User Persona Data Collection Template

Persona Development Worksheet

Demographics:

- Age range:
- Occupation:
- Technical proficiency (1-5):

Goals & Motivations:

- Primary goal when using our product:
- What success looks like to them:
- What motivates them to use our solution:

Pain Points & Frustrations:

- Current challenges:
- Workarounds they're using:
- What makes them abandon a task:

Behaviors & Preferences:

- When they typically use our product:
- Device preferences:
- Feature usage patterns:

Quote that captures their perspective:

User Journey Mapping Template

Journey Stage Documentation

For each stage in the user journey (Awareness, Consideration, Onboarding, etc.):

Stage: [Name]

User Actions:

- What is the user doing at this stage?
- What decisions are they making?

Touchpoints:

- What parts of your interface/product are they interacting with?
- What channels are they using?

Questions & Thoughts:

- What information does the user need?
- What might they be wondering?

Pain Points:

- What frustrations might occur?
- Where could they get stuck?

Emotions:

- How does the user feel at this stage?
- What's their satisfaction level (1-5)?

Opportunities:

- How could this stage be improved?
- What friction could be removed?

I see you're specifically focusing on the mentor-mentee program now. I'd be happy to create specialized templates for collecting user data specifically for a mentor-mentee matching platform. Here are customized templates you can use immediately:

Mentor Profile Data Collection Survey

1. EXPERIENCE & EXPERTISE

- What is your primary area of expertise? (dropdown with options)
- How many years of experience do you have in this field?
- What specific skills or knowledge are you most qualified to share?

2. MENTORING STYLE

- How would you describe your mentoring approach? (Select all that apply)
 - ☐ Hands-on coaching
 - ☐ Providing feedback on specific work
 - ☐ Sharing industry insights
 - ☐ Career guidance
 - ☐ Problem-solving partner
 - ☐ Networking facilitator
- How do you prefer to communicate? (Rank in order of preference)
 - ☐ Video calls
 - ☐ Voice calls
 - ☐ Text messaging
 - ☐ Email
 - ☐ In-person meetings
- How often would you ideally connect with your mentee?
 - ☐ Weekly
 - ☐ Bi-weekly
 - ☐ Monthly
 - ☐ As needed

3. WORKING PREFERENCES

- How would you describe your communication style? (Scale 1-5)
Direct ○ ○ ○ ○ ○ Diplomatic
- What is your approach to structure?
Highly structured ○ ○ ○ ○ ○ Flexible/adaptive
- What is your risk tolerance in advising mentees?
Conservative ○ ○ ○ ○ ○ Experimental

4. MENTORING GOALS

- What do you hope to gain from being a mentor? (Open-ended)
- What types of mentees do you connect with best? (Open-ended)
- Are there any specific challenges you'd prefer your mentee NOT to be facing?

Mentee Profile Data Collection Survey

1. DEVELOPMENT NEEDS

- What primary skill or knowledge area are you looking to develop?
- What specific goals do you hope to achieve through mentorship?
- What is your current experience level in this area?
 - ☐ Beginner
 - ☐ Intermediate
 - ☐ Advanced
 - ☐ Expert looking to pivot

2. LEARNING PREFERENCES

- How do you learn best? (Select all that apply)
 - ☐ Through observation
 - ☐ Through guided practice
 - ☐ Through independent work with feedback
 - ☐ Through theoretical discussion
 - ☐ Through problem-solving
 - How much structure do you prefer in a mentoring relationship?
 - Highly structured ☐ ☐ ☐ ☐ ☐ Flexible/adaptive
 - How do you prefer to receive feedback?
 - Direct ☐ ☐ ☐ ☐ ☐ Gentle/supportive
3. AVAILABILITY & COMMITMENT
- How frequently would you like to meet with your mentor?
 - How much time can you commit to work between mentoring sessions?
 - What is your timeline for achieving your mentoring goals?
4. MATCHING PREFERENCES
- Would you prefer a mentor with a similar background to yours or someone with a different perspective?
 - Is industry-specific experience essential for your mentor?
 - Do you have any specific preferences regarding your mentor's communication style?

Interview Questions for Program Administrators

1. PROGRAM GOALS
- What metrics will define success for this mentor-mentee program?
 - Are there specific skills or knowledge areas your organization wants to develop?
 - How do you plan to measure the effectiveness of the matches?
2. PRACTICAL CONSTRAINTS
- What is the duration of the mentoring relationship?
 - Will there be any structured activities or checkpoints built into the program?
 - What resources will be available to support mentors and mentees?
3. MATCHING PRIORITIES
- What factors should be given the highest priority when matching mentors and mentees?
 - Are there any absolute deal-breakers that would make a match inappropriate?
 - How important is personality compatibility versus skill alignment?

User Journey Mapping Template (Mentor-Mentee Specific)

STAGE: [Application / Matching / Initial Meeting / Ongoing Relationship / Conclusion]

MENTOR EXPERIENCE:

- Actions: What is the mentor doing at this stage?
- Pain points: What frustrations might they encounter?
- Expectations: What do they hope will happen?
- Support needs: What resources would help them succeed?

MENTEE EXPERIENCE:

- Actions: What is the mentee doing at this stage?
- Pain points: What frustrations might they encounter?
- Expectations: What do they hope will happen?
- Support needs: What resources would help them succeed?

PROGRAM ADMINISTRATOR TOUCHPOINTS:

- What interventions should happen at this stage?
- What information needs to be communicated?
- What metrics should be tracked?

OPPORTUNITIES FOR IMPROVEMENT:

- How could this stage be made more friction-free?
- What automation could help?
- What preventive measures could avoid common problems?

ACADEMIC MENTORING

Professor-Student Research Mentorship Survey

1. RESEARCH INTERESTS
- What specific research areas are you interested in exploring?
 - What research methodologies are you most comfortable with?
 - What academic databases/tools are you proficient in using?
2. ACADEMIC GOALS
- Are you pursuing publication, thesis completion, or knowledge acquisition?
 - What is your timeline for completing your research goals?
 - Do you have interest in pursuing further academic studies?
3. COLLABORATION STYLE
- Do you prefer structured weekly meetings or flexible check-ins?
 - How do you prefer to receive criticism on your academic work?
 - Do you work better with detailed guidance or general direction?

TECHNICAL SKILLS MENTORING

Software Development Mentor-Mentee Matching

1. TECHNICAL EXPERTISE
 - What programming languages are you proficient in? (Select all)
 - What development methodologies have you worked with?
 - What is your experience level with: (Rate 1-5)
 - * Front-end development
 - * Back-end systems
 - * Database design
 - * DevOps practices
 - * Testing frameworks
2. LEARNING/TEACHING OBJECTIVES
 - Are you looking to learn cutting-edge technologies or master fundamentals?
 - Do you prefer pair programming sessions or code reviews?
 - Are you interested in project-based learning or concept exploration?
3. CAREER PATH ALIGNMENT
 - What technical role are you currently in/aspiring toward?
 - Are you looking to specialize or become a generalist?
 - How important is industry-specific knowledge to your goals?

CORPORATE LEADERSHIP MENTORING

Executive Leadership Development Program

1. LEADERSHIP COMPETENCIES
 - Which leadership skills do you most want to develop? (Select top 3)
 - ☐ Strategic thinking
 - ☐ Team management
 - ☐ Change leadership
 - ☐ Crisis management
 - ☐ Stakeholder communication
 - ☐ Executive presence
 - ☐ Financial acumen
2. ORGANIZATIONAL CONTEXT
 - What size organization do you lead/aspire to lead?
 - Which industry sectors are most relevant to your career?
 - What organizational challenges are you currently facing?
3. LEADERSHIP STYLE
 - How would you describe your current leadership approach?
 - What leadership environments do you thrive in?
 - How do you typically handle conflict resolution?
4. MENTOR PREFERENCES
 - Would you prefer a mentor from your industry or a different sector?
 - Is geographic/cultural alignment important for your mentoring relationship?
 - Would you value more tactical advice or strategic guidance?

ENTREPRENEURSHIP MENTORING

Startup Founder Matching Program

1. VENTURE DETAILS
 - What stage is your business in? (Idea, MVP, Market Entry, Growth)
 - What industry/market are you targeting?
 - What is your current primary challenge? (Funding, Product, Team, Sales)
2. FOUNDER EXPERIENCE
 - Is this your first venture or have you founded companies before?
 - What aspects of entrepreneurship are you most comfortable with?
 - What specific entrepreneurial skills do you need to develop?
3. MENTORSHIP NEEDS
 - Are you looking for tactical advice or strategic guidance?
 - Would you benefit more from industry expertise or functional expertise?
 - Are you seeking connections to resources (investors, partners, talent)?
4. TIMELINE & COMMITMENT
 - How urgent are your mentoring needs? (Critical, Important, Developmental)
 - How frequently would you want to connect with your mentor?
 - Are you looking for short-term problem solving or ongoing guidance?

CREATIVE INDUSTRIES MENTORING

Arts & Design Mentorship Program

1. CREATIVE DISCIPLINE
 - What creative field do you work in? (Visual arts, music, design, writing, etc.)
 - What is your primary medium or specialization?
 - How would you describe your creative style or approach?
2. CAREER STAGE & GOALS
 - Are you emerging, mid-career, or established in your field?
 - What specific aspect of your creative practice needs development?
 - Are you seeking commercial success, artistic development, or both?
3. FEEDBACK PREFERENCES
 - How do you prefer to receive critique on your creative work?
 - Would you prefer in-progress feedback or evaluations of completed work?

- Are you looking for technical guidance, conceptual input, or career advice?

4. INSPIRATION & INFLUENCES

- What creators, movements, or styles influence your work?
- How important is conceptual alignment with your mentor?
- Would you prefer a mentor with similar aesthetic sensibilities or someone who provides contrast?

HEALTHCARE MENTORING

Medical Professional Development Program

1. CLINICAL FOCUS

- What is your medical specialty or area of practice?
- What specific clinical skills are you looking to develop?
- What patient populations do you primarily work with?

2. CAREER PATH

- Are you on an academic, clinical, research, or administrative track?
- What are your long-term goals in healthcare?
- What work-life balance considerations are important to you?

3. PRACTICE ENVIRONMENT

- What type of healthcare setting do you work in? (Hospital, clinic, private practice, etc.)
- What healthcare systems/EMRs are you familiar with?
- What interprofessional collaborations are part of your work?

4. MENTORSHIP FOCUS

- Are you seeking clinical expertise, research guidance, or career navigation?
- Would you benefit from a mentor in your specialty or a different area?
- Are you interested in developing teaching skills as part of your mentorship?

DIVERSITY & INCLUSION MENTORING

Inclusion-Focused Mentorship Program

1. IDENTITY & EXPERIENCE

- What aspects of your identity would you like acknowledged in the matching process? (Optional)
- Have you experienced specific barriers in your career progression?
- What supportive experiences have been most valuable to you?

2. MENTORING GOALS

- Are you seeking career advancement, skill development, or community building?
- Would you prefer a mentor with shared lived experiences or different perspectives?
- What specific challenges are you looking to navigate?

3. ORGANIZATIONAL CONTEXT

- How would you describe the inclusivity of your current environment?
- What D&I initiatives exist in your organization?
- What influence do you have to create positive change?

4. SUPPORT PREFERENCES

- Do you prefer direct advocacy, strategic guidance, or supportive listening?
- How comfortable are you discussing identity-related challenges?
- Would you benefit from connecting to specific networks or resources?

CROSS-CULTURAL MENTORING

Global Professional Development Program

1. CULTURAL BACKGROUND

- What cultures have shaped your professional approach?
- What languages do you speak professionally?
- Have you worked in multinational or cross-cultural environments?

2. GLOBAL EXPERIENCE

- Have you worked or studied internationally? Where?
- What cross-cultural challenges have you encountered professionally?
- What global markets are you most interested in understanding?

3. MENTORING FOCUS

- Are you seeking guidance on working across specific cultures?
- Are you preparing for an international assignment or role?
- Are you looking to develop global leadership capabilities?

4. COMMUNICATION PREFERENCES

- How directly do you prefer to receive feedback?
- How formally do you prefer to structure the mentoring relationship?
- How important is building personal rapport before addressing professional topics?

I'll expand with additional templates for more mentoring contexts as well as some communication post templates:

NONPROFIT LEADERSHIP MENTORING

Social Impact Leadership Program

1. MISSION FOCUS

- What social issues is your work addressing?

- What is your organization's current size and scope?
 - What is your vision for scaling your impact?
2. RESOURCE MANAGEMENT
 - What funding models are you currently using?
 - What stakeholders are you accountable to?
 - What resource challenges are you currently facing?
 3. LEADERSHIP NEEDS
 - How do you balance mission fulfillment with sustainability?
 - What governance structures are you working within?
 - What partnerships are crucial to your success?
 4. MENTOR ALIGNMENT
 - Would you benefit more from a mentor with nonprofit expertise or corporate crossover experience?
 - Are you seeking strategic guidance or operational insights?
 - What specific skills gap are you looking to address through mentorship?

CAREER TRANSITION MENTORING

Professional Pivot Program

1. TRANSITION DETAILS
 - What industry/role are you transitioning from?
 - What industry/role are you aiming to enter?
 - What is your timeline for making this change?
2. TRANSFERABLE SKILLS
 - What skills from your background are relevant to your target field?
 - What new skills do you need to develop?
 - What credentials or qualifications might you need?
3. NETWORK STATUS
 - What connections do you currently have in your target field?
 - What industry-specific knowledge gaps do you have?
 - What insider perspectives would be most valuable?
4. TRANSITION CHALLENGES
 - What specific barriers have you encountered in your transition?
 - What aspects of the change feel most uncertain?
 - What support systems do you currently have in place?

VETERANS MENTORING

Military-to-Civilian Transition Program

1. SERVICE BACKGROUND
 - What branch and role did you serve in?
 - What leadership experiences did you have during service?
 - What technical skills did you develop in the military?
2. CIVILIAN GOALS
 - What industry or role are you targeting?
 - What timeframe are you working with for your transition?
 - What aspects of civilian workplace culture are you adjusting to?
3. TRANSLATION CHALLENGES
 - How effectively can you communicate your military experience to civilian employers?
 - What parts of your service experience seem most valuable in civilian contexts?
 - What military skills or experiences have been challenging to translate?
4. MENTORSHIP NEEDS
 - Would you prefer a mentor with military background or civilian-only experience?
 - What specific guidance would be most valuable? (Job search, culture adjustment, skills development)
 - What support networks are you currently connected to?

MENTORSHIP COMMUNICATION TEMPLATES

Program Announcement Post

□ LAUNCHING: [PROGRAM NAME] MENTORSHIP PROGRAM

We're excited to announce our new mentorship initiative designed to [primary program goal]. Whether you're looking to share

□ AS A MENTOR, YOU'LL:

- Share your valuable insights and experience
- Develop your leadership and coaching abilities
- Expand your professional network
- Make a meaningful impact on someone's career journey

□ AS A MENTEE, YOU'LL:

- Gain personalized guidance aligned with your goals
- Develop new skills and perspectives
- Navigate challenges with experienced support
- Build valuable professional relationships

□ HOW TO APPLY:

Complete our matching survey by [DATE] at [LINK]

Program runs from [START DATE] to [END DATE]

Expected commitment: [TIME COMMITMENT]

Questions? Contact [PROGRAM COORDINATOR] at [CONTACT INFO]

Mentor Welcome Email

Subject: Welcome to the [PROGRAM NAME] Mentorship Program!

Dear [MENTOR NAME],

Thank you for volunteering your time and expertise as a mentor in our [PROGRAM NAME] program! Your willingness to guide oth

Based on our carefully designed matching process, we've paired you with [MENTEE NAME], who is [brief mentee description]. W

NEXT STEPS:

1. Review your mentee's profile in the attached document
2. Schedule your first meeting using the calendar link below (aim for within the next 2 weeks)
3. Complete the short "First Meeting Reflection" form afterward

RESOURCES:

- Mentorship Handbook: [LINK]
- Meeting Agenda Templates: [LINK]
- Program Timeline: [LINK]
- Support Contact: [CONTACT INFO]

Remember, successful mentorship relationships balance structure with flexibility. We recommend setting clear expectations i

We're here to support you throughout this journey. Please don't hesitate to reach out with any questions or concerns.

Warm regards,
[PROGRAM COORDINATOR]

Mentee Welcome Email

Subject: You've Been Matched! Welcome to the [PROGRAM NAME] Mentorship Program

Dear [MENTEE NAME],

Congratulations! We're excited to welcome you to the [PROGRAM NAME] mentorship program. After careful consideration of your

We believe [MENTOR NAME]'s experience in [relevant area] aligns well with your interest in [mentee's goal], making this a p

GETTING STARTED:

1. Review your mentor's profile in the attached document
2. Your mentor will reach out to schedule your first meeting within the next two weeks
3. Before your first meeting, please complete the "Mentorship Goals Worksheet" at [LINK]

PROGRAM DETAILS:

- Duration: [TIMEFRAME]
- Expected meeting frequency: [FREQUENCY]
- Key program milestones: [BRIEF LIST]

MAKING THE MOST OF MENTORSHIP:

- Come prepared to each meeting with specific questions or topics
- Be open to feedback and new perspectives
- Take initiative in scheduling and following up
- Respect your mentor's time by being punctual and prepared

If you have any questions or need support at any point, please contact [PROGRAM COORDINATOR] at [CONTACT INFO].

We're excited to see how this mentorship journey unfolds for you!

Best regards,
[PROGRAM COORDINATOR]

Mid-Program Check-in Survey

MENTORSHIP PROGRESS CHECK-IN

1. RELATIONSHIP QUALITY
 - How would you rate the quality of your mentoring relationship? (1-5)
 - What aspects of the relationship are working well?
 - What aspects could be improved?
2. PROGRESS ASSESSMENT
 - What progress have you made toward your original goals?
 - Have your goals evolved since the program began?
 - Are you encountering any obstacles to progress?
3. COMMUNICATION EFFECTIVENESS
 - How effectively are you communicating with your mentor/mentee?
 - Is the frequency of meetings adequate?
 - Are there any communication challenges to address?
4. SUPPORT NEEDS
 - What additional resources would help you succeed in this relationship?
 - Is there any intervention needed from program administrators?
 - What could the program provide to enhance your experience?
5. LOOKING AHEAD
 - What specific goals do you have for the remainder of the program?
 - Are there any adjustments needed to your mentorship agreement?
 - What would make the conclusion of this mentorship successful for you?

Success Story Template

□ MENTORSHIP SUCCESS SPOTLIGHT □

MEET THE PAIR:

[Mentor Name], [Mentor Title/Background]
[Mentee Name], [Mentee Title/Background]

THE CHALLENGE:

When [Mentee] joined the mentorship program, they were facing [specific challenge or goal]. They needed guidance on [specific]

THE APPROACH:

Working together, [Mentor] and [Mentee] focused on:

- [Specific strategy or approach #1]
- [Specific strategy or approach #2]
- [Specific strategy or approach #3]

THE BREAKTHROUGH:

After [timeframe] of consistent work, [Mentee] achieved [specific outcome or milestone]. According to [Mentee], "[Quote about]

[Mentor] reflects: "[Quote about what was rewarding about the mentorship]"

KEY LESSONS:

- [Insight or lesson learned]
- [Insight or lesson learned]
- [Insight or lesson learned]

WHAT'S NEXT:

[Mentee] is now [next steps or future goals].
[Optional: How the mentorship relationship will continue]

Inspired by this story? Learn more about our mentorship program: [LINK]

Here are templates designed specifically for community engagement, leveraging existing relationships, user discovery, and building personal connections with users:

COMMUNITY ENGAGEMENT TEMPLATES

Community Member Profile Survey

GETTING TO KNOW OUR COMMUNITY

1. COMMUNITY CONNECTION
 - How did you first discover our community?
 - How long have you been a member?
 - What initially drew you to participate?
2. PARTICIPATION PATTERNS
 - How do you typically engage with our community? (Select all that apply)
 - ☐ Attend events
 - ☐ Participate in discussions
 - ☐ Share resources/content
 - ☐ Mentor others
 - ☐ Learn from others
 - ☐ Connect with specific members
 - What times/days are you most likely to engage?
 - What barriers prevent you from participating more actively?
3. VALUE & MOTIVATION
 - What value do you gain from this community?
 - What keeps you coming back?
 - What would make this community even more valuable to you?
4. CONTRIBUTION POTENTIAL
 - What expertise or perspective could you share with others?
 - Would you be interested in taking a more active role? How?
 - What would make it easier for you to contribute?
5. PERSONAL CONNECTION
 - What do you do professionally?
 - What are you passionate about outside of work?
 - What's something about you that might surprise others?

Community Event Feedback Form

EVENT REFLECTION

1. EXPERIENCE RATING
 - Overall, how would you rate this event? (1-5 stars)
 - How relevant was the content to your needs/interests? (1-5)
 - How engaging was the format? (1-5)
2. HIGHLIGHTS & IMPROVEMENTS
 - What was the most valuable aspect of this event for you?
 - What could have made this event more valuable?
 - Was there anything missing that you hoped would be included?
3. CONNECTIONS MADE
 - Did you connect with new community members? (Yes/No)
 - How meaningful were these connections? (1-5)
 - Would you like support in following up with anyone you met?

4. FOLLOW-UP INTERESTS
 - What topics would you like to explore further?
 - Would you be interested in leading a discussion on a related topic?
 - What resources would help you implement what you learned?
5. PERSONAL IMPACT
 - How will you apply what you experienced today?
 - Has this event changed your perspective in any way?
 - What's one action you'll take as a result of attending?

USER DISCOVERY TEMPLATES

Deep Dive User Interview Guide

USER DISCOVERY CONVERSATION

INTRODUCTION (5 MIN)

- Thank you for taking the time to speak with me today
- This conversation will help us understand your needs better
- There are no right or wrong answers - we value your honest thoughts
- Do you mind if I record our conversation for note-taking purposes?

BACKGROUND & CONTEXT (10 MIN)

- Tell me a bit about yourself and your role
- Walk me through a typical day in your life
- What are the biggest challenges you face in your role?
- How do you currently solve these challenges?

PROBLEM EXPLORATION (15 MIN)

- When was the last time you encountered [specific problem]?
- Can you walk me through that experience step by step?
- What was most frustrating about that situation?
- How did you feel during this process?
- What solutions have you tried before?
- What worked well? What didn't work?

CURRENT SOLUTIONS (15 MIN)

- What tools or methods do you currently use?
- How did you discover these solutions?
- What do you like most about your current approach?
- If you could magically improve one thing, what would it be?
- Have you considered alternatives? Why or why not?

NEEDS & DESIRES (10 MIN)

- If you had a perfect solution, what would it do for you?
- How would you measure whether a new solution is successful?
- What would make you excited to try something new?
- What concerns would you have about adopting a new approach?

WRAP-UP (5 MIN)

- Is there anything else you think I should know?
- Would you be open to testing potential solutions in the future?
- Do you know anyone else who might have valuable insights on this?
- Thank you for your time and insights

User Journey Observation Guide

CONTEXTUAL INQUIRY FRAMEWORK

SETUP & PERMISSION

- Request to observe user in their natural environment
- Explain you'll be taking notes but won't interrupt their process
- Ask them to narrate their thoughts as they work (think-aloud protocol)

OBSERVATION FOCUS AREAS

- ☐ Physical Environment
 - How is their workspace arranged?
 - What tools/resources are within reach?
 - What environmental factors impact their work?
- ☐ Process Flow
 - What steps do they take to accomplish goals?
 - Where do they pause or hesitate?
 - What shortcuts or workarounds do they use?
 - What triggers them to shift between tasks?
- ☐ Pain Points
 - When do they show signs of frustration?
 - What tasks take longer than expected?
 - Where do errors or confusion occur?
 - What problems do they encounter but not mention?
- ☐ Social Interactions
 - Who do they collaborate with?
 - How do they seek help or information?
 - How do they share their work with others?
- ☐ Tools & Resources
 - What applications/tools do they use?
 - How do they transition between different tools?
 - What information do they reference repeatedly?

FOLLOW-UP QUESTIONS

- "I noticed you [specific behavior]. Can you tell me more about why you did that?"

- "That seemed to take longer than you expected. Is that typical?"
- "You looked unsure there. What were you thinking at that moment?"
- "How did you learn to do it that way?"
- "If you could change anything about this process, what would it be?"

PERSONAL CONNECTION TEMPLATES

Personal Values & Motivation Explorer

GETTING TO KNOW YOU DEEPLY

1. PERSONAL JOURNEY
 - What path led you to where you are today?
 - What was a pivotal moment that shaped your current direction?
 - What's a challenge you've overcome that you're proud of?
2. VALUES & MOTIVATIONS
 - What matters most to you in your work?
 - What gets you excited to start your day?
 - When do you feel most fulfilled or in flow?
 - What problem in the world would you most like to solve?
3. ASPIRATIONS & DREAMS
 - Where do you hope to be in 5 years?
 - What's something you've always wanted to learn or try?
 - What impact do you hope to have in your field or community?
 - What does success look like to you personally?
4. LIFESTYLE & PREFERENCES
 - How do you recharge outside of work?
 - What's a perfect day look like for you?
 - Who or what inspires you?
 - What environments help you do your best work?
5. CONNECTION POINTS
 - What topics could you talk about for hours?
 - What communities or groups are you part of?
 - How do you prefer to build relationships with others?
 - What makes you feel genuinely appreciated?

Empathy Building Activity

PERSPECTIVE SHARING EXERCISE

This exercise helps build deeper connections by exploring shared and divergent perspectives. Complete these prompts individ

PART 1: EXPERIENCES THAT SHAPED YOU

- Share a challenge you've faced that others might not know about
- Describe a moment when you felt truly understood
- Recall a time when your perspective dramatically changed
- What's a life experience that gives you unique insight?

PART 2: VALUES & PRINCIPLES

- What three principles guide your decisions?
- What's something you believe that most people disagree with?
- What do you think is often misunderstood about you?
- What would you stand up for, even at personal cost?

PART 3: HOPES & FEARS

- What's one goal that excites you right now?
- What's one concern keeping you up at night?
- What change are you currently navigating?
- What support would make the biggest difference for you?

PART 4: FINDING COMMON GROUND

- What similarities have you discovered during this conversation?
- What differences provide valuable perspective?
- How might we leverage our diverse viewpoints?
- What's one way we could support each other going forward?

RELATIONSHIP LEVERAGING TEMPLATES

Existing Relationship Enrichment Survey

DEEPENING OUR PARTNERSHIP

1. RELATIONSHIP ASSESSMENT
 - How would you describe our current relationship? (Multiple choice)
 - ☐ New acquaintances
 - ☐ Working relationship
 - ☐ Established partnership
 - ☐ Deep collaboration
 - ☐ Other: _____
 - What aspects of our relationship work particularly well?
 - What aspects could be strengthened?
2. VALUE EXCHANGE
 - What value have you gained from our relationship so far?
 - What additional value could we provide?
 - What value do you bring that might be underutilized?
 - How might we create more mutual benefit?

3. COMMUNICATION PREFERENCES
- How do you prefer to communicate? (Rank options)
 - What frequency of communication works best for you?
 - How do you prefer to receive updates or information?
 - What communication challenges have you experienced with us?
4. FUTURE POSSIBILITIES
- What new opportunities might we explore together?
 - What goals do you have that we might support?
 - What resources or connections could we share?
 - How might our relationship evolve over the next year?
5. PERSONAL CONNECTION
- What would help you feel more connected to our team/community?
 - What's something we should know about you that we might not?
 - What shared interests might strengthen our connection?

Network Mapping Workshop Template

RELATIONSHIP ECOSYSTEM MAPPING

STEP 1: IDENTIFY KEY RELATIONSHIPS

- List your most important professional relationships
- For each relationship, note:
 - * How long you've known each other
 - * The nature of your connection
 - * The strength of your relationship (1-5)
 - * Key mutual interests or values
 - * Recent interactions

STEP 2: VISUALIZE YOUR NETWORK

- Create a visual map with yourself at the center
- Position contacts based on:
 - * Proximity = relationship strength
 - * Grouping = common contexts or interests
- Draw connections between contacts who know each other
- Identify clusters and isolated relationships

STEP 3: ASSESS VALUE FLOWS

- For each relationship, identify:
 - * What value you receive
 - * What value you provide
 - * Potential untapped value
 - * Any imbalances to address

STEP 4: IDENTIFY OPPORTUNITIES

- Which relationships would benefit from renewal?
- Where are there potential introductions to make?
- Which relationships could be elevated to partnerships?
- What relationship gaps exist in your network?

STEP 5: CREATE ACTION PLAN

- Select 3-5 priority relationships to nurture
- For each, define:
 - * A specific next action
 - * A meaningful way to provide value
 - * A timeline for engagement
 - * A desired outcome

Would you like me to create any additional templates focused on specific aspects of building user relationships or community engagement? Or would you prefer templates for any other context?

PM Mentality Community: Weekly Engagement Brief

Week of: [Date Range]

Prepared by: [Your Name]

1. Executive Summary

Community Pulse: [1-2 sentences on overall health]

Key Wins:

- [Significant achievement]
- [Positive trend]
- [Member success story]

Focus Areas:

- [Priority 1]
- [Priority 2]
- [Priority 3]

2. Key Metrics Snapshot

Metric	Current	Previous	Change	Target	Status
--------	---------	----------	--------	--------	--------

Metric	Current	Previous	Change	Target	Status
Active Members	#	#	%	#	□/△
Engagement Rate	%	%	%	%	□/△
New Member Onboarding	#	#	%	#	□/△
Resource Utilization	%	%	%	%	□/△
Mentor Activity	#	#	%	#	□/△

3. Community Highlights

Member Spotlight:

"[Quote from member]"
— [Member Name], [Brief context]

Top Performing Content:

- [Content piece]: [Brief performance stats]
- [Content piece]: [Brief performance stats]

Emerging Discussions:

- [Topic]: [Brief description of conversation/interest]
- [Topic]: [Brief description of conversation/interest]

4. Active Experiments

[Experiment Name]

- Status: [Running/Completed]
- Hypothesis: [Brief statement]
- Current Results: [Early findings]
- Next Steps: [Action items]

[Experiment Name]

- Status: [Running/Completed]
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5. Member Feedback Insights

Key Themes:

- [Theme]: [Brief explanation and source]
- [Theme]: [Brief explanation and source]

Actions Taken:

- [Action]: [Response to specific feedback]
- [Action]: [Response to specific feedback]

Open Issues:

- [Issue]: [Plan to address]
- [Issue]: [Plan to address]

6. Next Week's Focus

Priority Actions:

- [Specific action item with clear outcome]
- [Specific action item with clear outcome]
- [Specific action item with clear outcome]

Upcoming Events:

- [Event Name]: [Date/Time] - [Brief description]
- [Event Name]: [Date/Time] - [Brief description]

Resources Needed:

- [Specific resource/support needed]
- [Specific resource/support needed]

7. Discussion Points

- [Strategic question for team input]
- [Decision needed]
- [Opportunity to explore]

☐ Community Onboarding Master Kit

For: PM Mentality | Role: Community Engagement Specialist (PM Mentality Brainiac Edition™)

☐ Onboarding Goals (SMART AF)

- Ensure **90% onboarding checklist completion** within 72 hours of joining.
 - Achieve **75% first-week activity rate** (Slack post, poll, event RSVP, etc).
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- Assign mentor from shared mentor pool (Trello automation)
- Pre-fill checklist & add member to tracking dashboard
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☐ Stage 2: First 72 Hours

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- Encourage intro post with “3-Layer Cake” or Icebreaker Roulette prompt
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☐ Internal Sync: Meeting Brief (Markdown Format)

Date: [Insert]

Owner: [Insert]

Attendees: [Community Team / Program Lead / Ops]

☐ 1. Status Overview

- Total new members: ☒
- Onboarded within 72h: [X%]
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- Where people are getting stuck: [Platform / Checklist / Events]
- Notable intro posts / engagement highlights: [Paste or summarize]

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- Any technical access issues?
- Feedback points about the welcome flow?
- Are mentors responding fast enough?

☐ 4. Experiments

- What did we test?
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- Summarize early sentiment or confusion
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Task	Owner	Deadline
Create Slack Welcome Flow	[Name]	[Date]
Improve Onboarding Email	[Name]	[Date]
Add checklist gamification	[Name]	[Date]

☐ KPI Dashboard (per audience)

Mentees

- Time-to-first-post: Goal <48h
- Checklist Completion Rate: 90%
- First-week Feedback Response Rate: 75%

Mentors

• of mentees greeted in 72h: Goal = 100%

- Engagement support in Slack threads: 3+ per week
- Mid-season feedback summary delivered

Team / Staff

- Onboarding review cycle: Biweekly
 - Suggestions implemented: Track % of actionable ideas
-

☐ Storage, Tracking & Automation Tools

☐ Links

- **Coda Hub:** [link]
- **Trello Tracker:** Onboarding checklist, mentor matches, weekly logs
- **Slack Workflow:** Auto-Welcome Bot + Reminder Flow

Automation Plan

- Welcome Reminder Bot @48h silence
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 - Calendar auto-subscribe in onboarding form
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☐ Bonus Sections (if you want to be THAT good)

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- Welcome Message DM
- Mentor Intro Prompt
- First Feedback Form Questions

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- “React to your favorite icebreaker!”
- “Find your PM twin!” personality quiz
- “Share your current project like a haiku”

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- Add humor + memes to Coda onboarding doc
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❑ Powerful Intro Frameworks (for personality-rich posts)

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Ask them to write a post in 3 parts:

1. **Top Layer (Fun Fluff):** Pick your vibe: a meme, a weird talent, or your guilty productivity pleasure.
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Example prompt:

"Hey fam! I’m [Name] and here’s my 3-Layer Cake Intro ❑:

❑ My vibe is: ‘Calendar sorceress meets dark-mode detective.’ ❑ I joined PMM to finally stop yelling at Jira and find a tribe that gets it. ❑ Biggest recent win: Finally launched a side project after 6 years of fear. Ask me how I destroyed perfectionism with Notion and memes."

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Build a Slack bot or doc with rotating prompts like:

- “Your toxic PM trait in a dating app bio?”
- “If your current task was a movie, what’s the title?”
- “What’s your red flag in a team project?”
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Gamify the intro with a template card:

📄 Name:
❑ Location:
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❑ Superpower:
❑ Weakness:
❑ Soundtrack for your workflow:
❑ DM me if you wanna talk about:

—> Let them post as an image, story-style (Canva templates FTW) or in Slack.

❑ Optional Add-ons to Deepen Personality Mapping:

- Add a “personality board” Coda form: music, memes, Enneagram/MBTI, favorite work tool
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❑ Let’s Set Priorities (Prompting Leadership)

Ask in your 1:1 or sync:

- "What type of member experience is most important to nail in the first 72h?"
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Let me know when you want the **Discord Migration Blueprint**, **Gamified Onboarding Tracker** in Coda, or a **Voice-of-Community system** hooked into your briefings.

❑ Coda Gamified Onboarding Tracker (Workflow Overview)

❑ Main Table: Onboarding Master Tracker

Columns:

- Name
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Filter: Status \neq Ghosting ☐ Sort by: XP Points DESC

Add: Progress bar, fun badge like:

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 - ☐ Missing in Action
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Filter:

- Join Date is > 72h ago
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Use Conditional Format: ☐ Red background. Because shame is a motivator, right?

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Use to auto-generate Slack digest for “What new members are saying”

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- **Slack Welcome Bot** → Adds member to Coda + kicks off row
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- ☐ **AI Column**: Summarize onboarding vibe per person (e.g. “Motivated but confused,” “Ghost-mode,” “Cracked energy.”)
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Wanna be *extra*, Miss Big Brain? I can help you:

- Design a matching **Coda Doc Homepage** with emoji tabs and themes
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☐ Gamified Trello Flow

Why? Because it locks in behavior, habit, and checklist dopamine fast. That onboarding flow needs to run like it's on rails with glitter and threats.

☐ Trello Automation Templates:

Columns:

- ☐ Welcome Brain Dump
- ☐ First 24h Wins
- ☐ 72h Missions
- ☐ Identity Challenges
- ☐ Ongoing XP

Card Examples:

- ☐ Post your intro in Slack (w/ button to Slack)
- ☐ Try "Icebreaker Roulette"
- ☐ Drop your Identity Card (link Canva)
- ☐ DM your mentor + screenshot it
- ☐ React in 3 threads

Automation:

- Card moves to ☐ when checklist completed
- When all 72h cards done → auto-tag as "Level 2 Initiate"
- Slack bot notification on Level Up (Zapier or Slack workflow)
- Weekly auto-email summary: your XP stats + a leaderboard tease

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YABAA, look who’s finally ready to **combine trackers like a productivity Power Ranger** ❑

Alright, Nerdzilla, here’s how you’re gonna build that **Gamified Onboarding Tracker in Coda** like the spreadsheet sorceress you pretend to be. This tracker will consolidate onboarding status, engagement actions, and feedback into a single juicy workflow. Let’s go, Big Brain:

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Say the word and I'll make your workflow prettier than your excuses.
Chat, what do we think? Is she finally ready or just pretending again? ☹

Ah, so now you want to get serious about personality combinations? Look at you, finally wanting to do something meaningful! 😊 Alright, alright, let's talk about it. When it comes to **Project Management Mentor-Mentee relationships**, you definitely need a careful blend of personalities to make sure they click and have a productive dynamic. It's not just about skills—it's about **complementary traits**.

Let's dive into the combinations:

1. Experienced Leader (Mentor) + Eager Learner (Mentee)

Personality Types:

- **Mentor:** Experienced, confident, structured, goal-oriented, patient, empathetic
- **Mentee:** Eager to learn, adaptable, open-minded, ambitious, and willing to take constructive feedback

Why This Works:

The experienced mentor will provide guidance and direction, while the mentee's eagerness and willingness to learn will allow them to soak up knowledge like a sponge. The **mentor's ability to communicate clearly** and the **mentee's humility** to ask questions creates a safe, growth-oriented relationship. The mentee's enthusiasm and fresh perspective can also energize the mentor.

2. Detail-Oriented Mentor + Big-Picture Mentee

Personality Types:

- **Mentor:** Analytical, perfectionist, methodical, cautious, detail-oriented, organized
- **Mentee:** Visionary, creative, risk-taker, strategic thinker, not always focused on details

Why This Works:

The **detail-oriented mentor** can help the **big-picture thinker** focus on the smaller aspects that might slip through the cracks. The **mentor's meticulousness** will guide the mentee in building a structured project plan, while the mentee's **creativity** will inspire the mentor to think beyond rigid constraints. It's a great blend of **practical execution** and **strategic foresight**. This relationship thrives on balance—**one provides focus, the other brings innovation**.

3. Calm, Logical Mentor + High-Energy, Motivated Mentee

Personality Types:

- **Mentor:** Calm, logical, composed, analytical, methodical, emotionally stable
- **Mentee:** High-energy, passionate, driven, impatient, possibly emotional

Why This Works:

The **calm mentor** can help the **high-energy mentee** focus their enthusiasm, keep them grounded, and provide clarity during stressful moments. The **mentor's logical approach** balances the **mentee's intense drive**, ensuring they don't burn out. Meanwhile, the mentee can teach the mentor to think outside the box and approach challenges with **newfound energy**. This is a combination where **the mentor guides and the mentee ignites**.

4. Risk-Averse Mentor + Risk-Taking Mentee

Personality Types:

- **Mentor:** Cautious, risk-averse, practical, safety-conscious, detail-oriented
- **Mentee:** Bold, adventurous, willing to take risks, innovative, potentially more comfortable with uncertainty

Why This Works:

The **risk-averse mentor** can help the **risk-taking mentee manage and mitigate risks**, ensuring that the mentee doesn't make impulsive decisions. The mentor's **safeguards** and **prudence** act as an anchor, while the mentee's willingness to experiment and think outside the box encourages **creative problem-solving**. It's a good balance of **caution and innovation**—one keeps the ship steady, and the other pushes it forward.

5. Collaborative Mentor + Independent Mentee

Personality Types:

- **Mentor:** Collaborative, supportive, communicative, team-oriented, encouraging
- **Mentee:** Independent, self-starter, prefers autonomy, goal-oriented but not necessarily looking for too much guidance

Why This Works:

The **collaborative mentor** can be a **supportive sounding board** for the **independent mentee** who thrives on autonomy. This combination allows the mentee to feel **empowered** and **trusted**, while the mentor still offers advice when needed, especially when it comes to handling project-related teamwork and collaboration. It's like a **good coach**—they push you but let you do your thing. This works well for individuals looking to **take ownership of their projects**, with the mentor stepping in to help **connect the dots** when necessary.

6. Empathetic Mentor + Assertive Mentee

Personality Types:

- **Mentor:** Compassionate, empathetic, nurturing, supportive, understanding
- **Mentee:** Assertive, proactive, confident, but might sometimes be overly direct or come off too strong

Why This Works:

The **empathetic mentor** can provide emotional support and **build a trusting relationship**, helping the **assertive mentee** refine their **communication style**. The mentee's **assertiveness** can push them to **take risks** and speak up when necessary, while the mentor's **understanding nature** keeps the mentee grounded in positive, supportive feedback. It's about teaching the mentee how to **channel their assertiveness** into effective leadership without coming off as too harsh.

7. Innovative Mentor + Practical Mentee

Personality Types:

- **Mentor:** Creative, forward-thinking, embraces change, flexible, open-minded
- **Mentee:** Practical, grounded, focused on delivering results, prefers structure, follows processes

Why This Works:

The **innovative mentor** can introduce the **practical mentee** to **new ideas** and encourage them to think creatively about project management, while the **practical mentee** helps the mentor stay grounded and focus on **tangible outcomes**. This is a good combo for environments where **change and innovation** need to be balanced with **consistent, dependable execution**. The mentor challenges the mentee to think differently, while the mentee brings it back to reality, ensuring that ideas get executed effectively.

Ah, look at you, suddenly thinking ahead! So, you wanna actually figure out who goes where, huh? Genius idea. ☺

Let's break this down, "**Professor of Project Management**," because we both know you need a **method** for this, not just some random guesswork.

Step 1: Define the Key Traits You Need

First, you need to **categorize the traits** you're looking for in both mentors and mentees. You're looking for **complementary** pairs, right? So, figure out which **personalities** will mesh well with each other. Here's how to approach it:

For Mentors:

- **Experience:** How many years have they been in project management? Are they a high-level expert or more of a mid-level mentor?
- **Leadership Style:** Are they more **hands-off** or **hands-on**? **Directive** or **coaching** style?
- **Risk Tolerance:** Are they **cautious** or do they encourage **innovative, risky ideas**?
- **Communication:** How do they communicate with people? **Supportive**? **Critical**? **Empathetic**?

For Mentees:

- **Learning Style:** Are they **independent** or do they need **guidance**? Do they thrive in a **structured environment** or need a little more **freedom** to be creative?
 - **Goals:** What are their **career objectives**? Are they focused on **learning new skills** or **advancing in their current role**?
 - **Personality:** Are they **assertive**? **Introverted**? **Open to feedback**?
 - **Risk Propensity:** Are they comfortable taking **calculated risks**, or do they prefer the safety of tried-and-true methods?
-

Step 2: Create a Compatibility Matrix

Now that you've got all these traits defined, you can set up a **matrix** to match mentors with mentees.

For example: | Trait | Mentor Type A (Analytical) | Mentor Type B (Creative) | Mentee Type 1 (Big Picture) | Mentee Type 2 (Detail-Oriented) | |---|
|-----|-----|-----|-----|-----|
Medium | Low | | Communication Style | Directive | Supportive | Open to feedback | Needs clarity | | Learning Style | Structured | Adaptive | Needs support | Independent | | Personality | Logical, cautious | Visionary, adventurous | High-energy, visionary | Methodical, reserved |

This way, you can visually **compare traits** and see which combinations will **work best**.

Step 3: Gather Personality Data

You don't just want to guess people's personalities—get some solid **data**! Here's how:

1. **Surveys/Questionnaires:** Have each potential mentor and mentee fill out a questionnaire based on the traits you've defined. Keep it short but targeted to uncover the key personality elements (e.g., "How do you handle stressful situations?", "Do you prefer to work alone or in teams?", "How do you approach risk?")
2. **Assessments:** Use existing personality frameworks like the **Myers-Briggs Type Indicator (MBTI)** or the **DISC Personality Test** to get data on their cognitive and behavioral traits. You could even create your own simple system if you want.

Step 4: Match Based on Complementary Traits

Once you have the data, **start making matches** based on the **complementary traits**. Here's a basic matching strategy:

1. **Big Picture + Detail-Oriented**: Match these because one can guide the other to ensure the project is both **visionary and executable**.
2. **Risk-Taker + Cautious Planner**: A **creative risk-taker** mentee could benefit from a **structured mentor** who can help mitigate risks while still fostering innovation.
3. **Experienced + Eager Learner**: If you have a **newcomer mentee**, you want to pair them with someone who is **patient and experienced**, but willing to help them grow.

Example Match:

- **Mentor**: Experienced, calm, and structured with high-risk aversion (Type A)
- **Mentee**: High-energy, risk-taking, innovative (Type 1)

This is a **powerful match** because the mentor will **ground** the mentee's wild ideas while the mentee will challenge the mentor to think outside the box.

Step 5: Trial and Feedback

You can't just assume it'll work perfectly right away. **Trial runs** are key.

1. **Trial Period**: Allow the mentor-mentee pairs to work together for a short period (e.g., a month) before making the final call. See if their personalities **click**.
2. **Check-Ins**: Regularly ask both mentors and mentees how things are going. Use open-ended questions like: "What do you feel is missing from your relationship?" or "Do you feel challenged in a way that helps you grow?"

If you notice mismatches:

- Swap roles based on feedback.
 - Reevaluate the traits you've matched and adjust accordingly.
-

Step 6: Data-Driven Adjustments

Once you've got a couple of people matched and some feedback rolling in, **analyze the results**. Look for patterns in the pairs that worked well, and then try to **repeat** those matches with new pairs.

It might look like this:

- **Successful Match Traits**: High-risk tolerance + grounded, creative mentor → Highly innovative outcomes
 - **Struggled Match Traits**: Detail-focused mentee + high-risk mentor → Communication breakdown
-

Step 7: Refine and Optimize

After your first round of matches and adjustments, you'll start to see **which combinations work best**. Gradually, you'll get a clearer picture of which types of **personalities truly thrive together**, and you'll be able to make even more accurate and **efficient pairings**.

Key Takeaways:

- **Personality matters**: Focus on complementary traits like risk tolerance, leadership style, and communication preferences.
- **Trial and feedback**: Test out your matches and adjust based on how well they collaborate.
- **Optimize over time**: Analyze which pairings work and refine your matching strategy.

And there you have it, genius! You're now officially equipped to **map out your perfect mentor-mentee matches** based on personality. No more guesswork. Time to make those genius pairings happen. You'll crush this! ☐

I see you're specifically focusing on the mentor-mentee program now. I'd be happy to create specialized templates for collecting user data specifically for a mentor-mentee matching platform. Here are customized templates you can use immediately:

Mentor Profile Data Collection Survey

1. EXPERIENCE & EXPERTISE
 - What is your primary area of expertise? (dropdown with options)
 - How many years of experience do you have in this field?
 - What specific skills or knowledge are you most qualified to share?
2. MENTORING STYLE
 - How would you describe your mentoring approach? (Select all that apply)
 - ☐ Hands-on coaching
 - ☐ Providing feedback on specific work
 - ☐ Sharing industry insights
 - ☐ Career guidance
 - ☐ Problem-solving partner
 - ☐ Networking facilitator
 - How do you prefer to communicate? (Rank in order of preference)

- ☐ Video calls
 - ☐ Voice calls
 - ☐ Text messaging
 - ☐ Email
 - ☐ In-person meetings
 - How often would you ideally connect with your mentee?
 - ☐ Weekly
 - ☐ Bi-weekly
 - ☐ Monthly
 - ☐ As needed
3. WORKING PREFERENCES
- How would you describe your communication style? (Scale 1-5)
Direct ☐ ☐ ☐ ☐ ☐ Diplomatic
 - What is your approach to structure?
Highly structured ☐ ☐ ☐ ☐ ☐ Flexible/adaptive
 - What is your risk tolerance in advising mentees?
Conservative ☐ ☐ ☐ ☐ ☐ Experimental
4. MENTORING GOALS
- What do you hope to gain from being a mentor? (Open-ended)
 - What types of mentees do you connect with best? (Open-ended)
 - Are there any specific challenges you'd prefer your mentee NOT to be facing?

Mentee Profile Data Collection Survey

1. DEVELOPMENT NEEDS
- What primary skill or knowledge area are you looking to develop?
 - What specific goals do you hope to achieve through mentorship?
 - What is your current experience level in this area?
 - ☐ Beginner
 - ☐ Intermediate
 - ☐ Advanced
 - ☐ Expert looking to pivot
2. LEARNING PREFERENCES
- How do you learn best? (Select all that apply)
 - ☐ Through observation
 - ☐ Through guided practice
 - ☐ Through independent work with feedback
 - ☐ Through theoretical discussion
 - ☐ Through problem-solving
 - How much structure do you prefer in a mentoring relationship?
Highly structured ☐ ☐ ☐ ☐ ☐ Flexible/adaptive
 - How do you prefer to receive feedback?
Direct ☐ ☐ ☐ ☐ ☐ Gentle/supportive
3. AVAILABILITY & COMMITMENT
- How frequently would you like to meet with your mentor?
 - How much time can you commit to work between mentoring sessions?
 - What is your timeline for achieving your mentoring goals?
4. MATCHING PREFERENCES
- Would you prefer a mentor with a similar background to yours or someone with a different perspective?
 - Is industry-specific experience essential for your mentor?
 - Do you have any specific preferences regarding your mentor's communication style?

Interview Questions for Program Administrators

1. PROGRAM GOALS
- What metrics will define success for this mentor-mentee program?
 - Are there specific skills or knowledge areas your organization wants to develop?
 - How do you plan to measure the effectiveness of the matches?
2. PRACTICAL CONSTRAINTS
- What is the duration of the mentoring relationship?
 - Will there be any structured activities or checkpoints built into the program?
 - What resources will be available to support mentors and mentees?
3. MATCHING PRIORITIES
- What factors should be given the highest priority when matching mentors and mentees?
 - Are there any absolute deal-breakers that would make a match inappropriate?
 - How important is personality compatibility versus skill alignment?

User Journey Mapping Template (Mentor-Mentee Specific)

STAGE: [Application / Matching / Initial Meeting / Ongoing Relationship / Conclusion]

MENTOR EXPERIENCE:

- Actions: What is the mentor doing at this stage?
- Pain points: What frustrations might they encounter?
- Expectations: What do they hope will happen?
- Support needs: What resources would help them succeed?

MENTEE EXPERIENCE:

- Actions: What is the mentee doing at this stage?
- Pain points: What frustrations might they encounter?

- Expectations: What do they hope will happen?
- Support needs: What resources would help them succeed?

PROGRAM ADMINISTRATOR TOUCHPOINTS:

- What interventions should happen at this stage?
- What information needs to be communicated?
- What metrics should be tracked?

OPPORTUNITIES FOR IMPROVEMENT:

- How could this stage be made more friction-free?
- What automation could help?
- What preventive measures could avoid common problems?

Would you like me to further customize any of these templates for specific types of mentoring (career development, technical skills, leadership, etc.) or for particular industries?

Here is a detailed timeline and cast of characters based on the provided sources:

PM Mentality Community Engagement Timeline This timeline outlines the key phases and activities related to the PM Mentality community, focusing on onboarding, engagement, and metrics, based on the provided sources.

Phase 1: Onboarding & Initial Engagement (Day 0 - Week 1+)

Day 0-1: New member receives Slack and Coda invites (automated). New member is added to the Trello tracker. Mentor matching is prepared. New member receives a welcome email containing an intro post guide, checklist, and Slack guide. An Auto-Welcome Bot tags the new member in Slack. A checklist link is provided in the welcome email and pinned in a Slack DM. Goal: Attain 100% Slack + Coda access within 24 hours of invite.

Day 1: Welcome Message DM is sent. **Day 1-2:** A reminder ping is sent at 48 hours if the onboarding checklist is untouched. New members are prompted to post their intro using the "3-Layer Cake" framework or "Icebreaker Roulette." The "Identity Card Challenge" (using Canva templates) is an optional gamified intro method. New members are encouraged in light engagement activities (reacting, polls, event RSVPs). New members are listed in the "Who's New" Coda table and Slack thread. New members are given a small mission, such as commenting or posting in #random or #your-journey. **Day 2:** A DM check-in message ("How's your PM Mentality experience so far?") is sent. DM: "Hey [Name]! What brings you to PM Mentality?" is sent. **Day 3:** Starter content is highlighted, and new members are invited to the intro thread. Mentor Spotlight Moment: Mentors are encouraged to post a public praise of their mentee after 72 hours. DM: "How's your PM Mentality experience so far?" is sent. Within 72 Hours of Joining: Goal: Ensure 90% onboarding checklist completion. Coda View 2 flags members who joined > 72 hours ago and have < 90% checklist completion with a red background. **Day 5:** A public nudge (if appropriate) is sent, potentially featuring the member in a "Member We Love" roundup or shouting out their intro with humor. Ask: "What's one thing you'd love help with right now?" is sent. **Day 7:** A Resource Recommendation DM is sent, personalized based on interests. New members are invited to the weekly kickoff event. A "FOMO Bomb" is deployed, inviting the member to an exclusive event or mini-challenge. Goal: Achieve 75% first-week activity rate (Slack post, poll, event RSVP, etc). Goal: Generate 1 qualitative feedback point per new member in the first week. **Phase 2: Developing Engagement & Feedback Loops (Weeks 1 - 4)**

Ongoing (Week 1+): Members gain XP points for various activities (intro post, reacting, commenting, DMing mentor, feedback forms, event participation). Trello labels (Newbie Hatchling, Level 2 Initiate, Momentum Mage, Core Cult Member) are automatically updated based on XP thresholds, triggering Slack bot behavior and access to new challenges or shoutouts. Weekly XP cycles are tracked in Coda. Gamified labels are used in Trello to signify progress and unlock rewards. Habit reinforcement is designed through variable rewards, micro-challenges, XP streaks, and public XP visibility. Feedback is collected through various channels and categorized weekly (Collection & Categorization). Patterns and trends in feedback are identified (Pattern Identification). The impact of feedback themes on the community is assessed (Impact Assessment). Action plans (Quick wins, Strategic initiatives, Long-term considerations) are developed based on feedback (Action Planning). The loop is closed by documenting feedback and actions, communicating changes, and acknowledging contributors (Closing the Loop). Experiment ideas are generated and logged (potential link to a "Lab Rats Log in Coda"). Needs Assessment surveys are conducted to shape upcoming programs/initiatives. Community Health Indicators (Engagement Vitality, Community Culture, Knowledge Exchange, Member Journey, Leadership Health) are monitored. A Community Health Index (CHI) is calculated as a weighted average of dimension scores. Weekly: Minimum goal of 3 meaningful replies to mentee threads, 1 initiated thread or check-in prompt, 1 personalized DM follow-up, and 1 piece of feedback collected for mentors. Weekly Power Prompts (Slack Thread or Coda Embed) are dropped to surface ambitious ideas and encourage constructive friction. Bi-weekly feedback sessions are aimed for. **Week 3+ (Retention Loop):** A "What's next?" DM nudge is sent with an XP goal or spotlight option. Members are invited to become a buddy/mentor-in-training. Members are added to a contributor thread (ideas, shoutouts, guest-hosting). An NPS survey or 3-minute feedback round is conducted. Members are tagged as "active core" if they have 3+ weeks of participation, triggering rewards or badges. **Day 30 (One Month Anniversary):** A DM is sent: "Your first month with PM Mentality - What's next?" Ongoing Community Activities

Regularly: Conditional Formatting is used in dashboards (Google Sheet/Coda) to visually indicate KPI health (Green, Yellow, Red) and trends (Up, Down, No Change). Meetings are tracked with action items, owners, due dates, and statuses. Community Culture and Values are reinforced through community-wide messages and integrated into onboarding materials. Behavior Modeling templates are used to address specific situations constructively. Brag Bites are encouraged for members to share accomplishments in a running thread or Coda view. Mentor KPIs (Mentee Response Rate, First Engagement, Feedback Quality Rating, Mentor Pulse Participation, Contribution to Knowledge Base) are tracked quarterly. Mentor-Mentee matching logic is applied based on key traits and compatibility matrices. Re-engagement sequences (Day 5 Public Nudge, Day 7 FOMO Bomb, Automated DMs/Emails/Trello labels for inactivity) are implemented. Bonus moves like "Comeback Kid" badges and a #resurrected-legends Slack channel are utilized for re-engagement. Surveys (Quick User Needs, User Context) and Interviews (Experience Mapping, Behavior Understanding, Deep Dive User Interview Guide) are conducted for user data collection and discovery. Personal Connection Templates (Personal Values & Motivation Explorer, Empathy Building Activity) are used. Relationship Leveraging Templates (Existing Relationship Enrichment Survey, Network Mapping Workshop Template) are utilized. Mentorship Communication Templates (Program Announcement, Mentor Welcome Email, Mentee Welcome Email, Mid-Program Check-in Survey, Success Story Template) are used. Community Engagement Templates (Community Member Profile Survey, Community Event Feedback Form) are used. Role-Based SMART Goals and KPIs for Community Culture, Experiments, Feedback, Learning Hub, and Community Voice are tracked. A Content & Learning Experience Tracker (Coda/Google Sheet) is maintained with tabs for Content Calendar, Top Used Resources, Mentor Activity Log, Member Highlights, Experiments Log, Monthly Wins Wall, and New Member Pipeline. Escalation needed messages are used to tag the Team for blockers. Community Situation Responses (Skeleton Replies) are used. Feedback templates for declining engagement follow-up and formal exit surveys are implemented. Community-wide messages and direct messages are used for celebrating milestones and documenting member impact. Community culture and values are reinforced and integrated into onboarding materials. Behavior modeling is used to guide how the community handles specific situations. Needs assessment surveys are conducted for program development. **Cast of Characters** This list includes the principal people and roles mentioned in the provided sources, along with brief descriptions of their roles and significance within the PM Mentality community context.

PM Mentality Community Engagement Specialist: This is the central figure responsible for designing, implementing, and optimizing the community's onboarding, engagement, and retention strategies for the PM Mentality community. They are highly focused on data, gamification, and creating a vibrant, productive environment. They are addressed with various informal and often playful nicknames by the "Chat" AI, reflecting the

tone of the planning documents (e.g., "Miss Big Brain", "Nerdzilla", "Queen of Community Engagement", "Miss Ghosted-Guru™", "Professor of Project Management", "Professor Onboard-o-tron 9000", "Nerd Boss™", "Queen of Organized Chaos™", "Spreadsheet Cult Leader™"). Mentors: Experienced members of the PM Mentality community who guide and support newer members (mentees). They are crucial for knowledge sharing, fostering a supportive community culture, and their activity and impact are tracked through specific KPIs. Attracting and retaining valuable mentors is a key focus. Mentees: New or less experienced members of the PM Mentality community who are going through the onboarding process and seeking guidance from mentors. The onboarding and engagement strategies are heavily tailored to their journey and needs, with the goal of quickly integrating them into the community. Team: Refers to the core team supporting the PM Mentality community, including potentially program leads, operations personnel, or other internal staff. They are involved in internal sync meetings, prioritizing blockers, and implementing initiatives related to community engagement. They are tagged for escalation when blockers are identified. @Elena: Mentioned as a mentee in the Engagement Tracker Template, receiving a supportive mentor-style reply and feedback about her take on pacing. She serves as an example of a community member benefiting from the mentor program. @Stefano: Highlighted as a "BEST ENGAGER" for Slack within the PM Mentality community. He is known for using metaphors effectively and making even routine updates engaging, serving as a model for desirable engagement behavior. @Tia: Highlighted as a "BEST ENGAGER" for Slack within the PM Mentality community. She is described as a serial tagger and hype queen who uses fire emojis strategically to boost energy and participation, serving as a model for desirable engagement behavior. @Jules: Highlighted as a "BEST ENGAGER" for Slack within the PM Mentality community. He is known for asking "weirdly specific" questions that encourage quieter members to participate and come out of hiding, serving as a model for desirable engagement behavior. @OtakuPM: Highlighted as a "BEST ENGAGER" for Discord within the PM Mentality community. He is characterized as the "King of '??'" and side-eye emojis" who reacts to everything, illustrating a distinct style of engagement on that platform. @ModMilly: Highlighted as a "BEST ENGAGER" for Discord within the PM Mentality community. She is known for dropping memes with perfect timing and having an unmatched engagement ratio, serving as a model for desirable engagement behavior on Discord. @NoiseEngineer: Highlighted as a "BEST ENGAGER" for Discord within the PM Mentality community. He is known for building lore around members (e.g., "The Notion Witch," "Sprint Goblin"), contributing to a unique and engaging community culture. Chat (or Chat Gods): This refers to the AI or conversational interface that is providing feedback, generating templates, and interacting with the Community Engagement Specialist. The tone is often sarcastic, informal, and uses various playful and sometimes teasing nicknames for the specialist. The Chat's input is integral to the development and refinement of the community engagement strategy and documentation.

PM Mentality Community Study Guide PM Mentality Community Engagement Study Guide Quiz Answer each question in 2-3 sentences based on the provided source material. 1. What are the five core health dimensions used to calculate the Community Health Index (CHI) for the PM Mentality community? 2. Describe the calculation method for the Overall CHI based on the provided sources. 3. Identify two specific SMART goals outlined for the PM Mentality community's onboarding process. 4. What is the "3-Layer Cake Intro," and why is it used during onboarding? 5. Explain how gamification is incorporated into the PM Mentality onboarding process, citing at least one specific example. 6. According to the sources, what are mentors' key responsibilities and how is their performance tracked? 7. Briefly outline the five steps of the weekly feedback synthesis process used in the PM Mentality community. 8. Besides general engagement, what are two other categories of metrics tracked for the Community Engagement Specialist's role? 9. Describe the distinctive tone and voice found in the PM Mentality internal planning documents, and what purpose it serves. 10. What is the primary purpose of having re-engagement strategies and tactics for inactive members? Quiz Answer Key 1. The five core health dimensions are Engagement Vitality, Community Culture, Knowledge Exchange, Member Journey, and Leadership Health. These dimensions are weighted differently to contribute to the final CHI score. 2. The Overall CHI is calculated by first converting each indicator within the five dimensions to a 0-100 scale based on its current value relative to defined warning and healthy thresholds. Then, a dimension average is calculated from its indicators' scores, and the Overall CHI is the weighted average of these dimension scores. 3. Two specific SMART goals are ensuring 90% onboarding checklist completion within 72 hours of joining and achieving a 75% first-week activity rate. Another goal is to generate 1 qualitative feedback point per new member in the first week. 4. The "3-Layer Cake Intro" is a structured framework for new member introductions in the community. It encourages members to include "fun fluff," "substance," and "realness" in their introductory posts to facilitate more engaging introductions. 5. Gamification is integrated through XP points awarded for various activities like intro posts, reactions, and feedback. Trello labels and Coda views track XP and signify progress, using terms like "XP God" or "Just Hatched." 6. Mentors are responsible for guiding and supporting mentees, sharing knowledge, and fostering community culture. Their performance is tracked quarterly using KPIs such as Mentee Response Rate, First Engagement, Feedback Quality Rating, Mentor Pulse Participation, and Contribution to Knowledge Base. 7. The weekly feedback synthesis process involves Collection & Categorization, Pattern Identification, Impact Assessment, Action Planning, and Closing the Loop. This ensures feedback is systematically gathered, analyzed, prioritized, and acted upon with communication back to contributors. 8. Besides general engagement (# of intro replies), metrics are tracked for Experiments (engagement delta), Feedback (response count, actionable items), Learning Hub (resource usage), and Community Voice (blocker themes surfaced). 9. The internal planning documents use a playful, sarcastic, and high-energy tone, often using nicknames for the Community Engagement Specialist. This tone is a deliberate "antidote to boring onboarding guides" and aims to create a more engaging internal environment. 10. The primary purpose of re-engagement strategies is to reactivate inactive or "ghosting" members. This involves sequences of communication and incentives, aiming to bring members back into active participation and contribute to overall community health metrics. Essay Format Questions 1. Analyze the PM Mentality community's phased engagement strategy, specifically focusing on the transition from Onboarding & Initial Engagement to Developing Engagement & Feedback Loops. Discuss the key activities and goals associated with each phase and how they contribute to long-term member retention. 2. Evaluate the importance of the Community Health Index (CHI) within the PM Mentality framework. Explain how the CHI acts as a comprehensive metric and discuss the significance of its five weighted dimensions in providing a holistic view of community well-being. 3. Discuss the role of gamification in the PM Mentality community. Provide specific examples of how XP points, badges, and other gamified elements are used during onboarding and ongoing engagement, and analyze their intended impact on member behavior and habit reinforcement. 4. Examine the closed-loop feedback system implemented in the PM Mentality community. Describe the process for collecting, analyzing, and acting upon member feedback, and explain why this systematic approach is crucial for continuous improvement and building trust. 5. Analyze the distinctive tone and voice used in the PM Mentality internal planning documents. Discuss the intended purpose of this tone, how it contrasts with traditional documentation, and provide examples of how it is manifested in the source material. Glossary of Key Terms • 3-Layer Cake Intro: A structured framework for new member introductions, encouraging posts with distinct sections for "fun fluff," "substance," and "realness." • A/B Testing: A method of comparing two versions of something (e.g., a welcome sequence) to see which performs better. • Actionable Insights: Feedback or data points that directly inform or lead to specific changes or improvements. • Brag Bites: An encouraged activity for members to share accomplishments, often in a running thread or Coda view, promoting visibility and positive peer interaction. • Chat (or Chat Gods): Refers to the AI or conversational interface that provides feedback and generates planning documents, often with a sarcastic and informal tone. • Cohort Analysis: Tracking the behavior and retention of groups of members who joined around the same time to identify patterns. • Community Culture: A dimension of community health focused on aspects like sentiment, inclusivity, psychological safety, and alignment with community values. • Community Health Index (CHI): A single metric calculated from weighted dimensions (Engagement Vitality, Culture, Knowledge Exchange, Member Journey, Leadership Health) to represent overall community well-being. • Community Onboarding Master Kit: A comprehensive set of resources, goals, and templates designed to guide new members through their initial experience in the community. • Community Situation Responses (Skeleton Replies): Pre-drafted templates for addressing specific common situations or inquiries within the community. • Conditional Formatting: Using rules to automatically change the appearance of data (e.g., cell background color) based on its value, often used in dashboards to indicate KPI health. • Coda: A collaborative document tool used for onboarding trackers, dashboards, content management, and tracking metrics. • Engagement Vitality: A dimension of community health measuring active participation, contribution rates, discussion initiation, and response times. • Experiment Hypothesis: A structured statement predicting the outcome of a specific change or initiative within the community. • Feedback Quality Rating (Peer): A metric used to assess the quality of feedback provided, often tracked for mentors. • FOMO Bomb: A tactic used in the re-engagement sequence, inviting a member to an exclusive event or mini-challenge to create a "fear of missing out." • Gamified Onboarding Tracker: A system, often built in tools like Coda or Trello, that uses game-like elements (XP, badges, points) to motivate new members during onboarding. • Ghosting: The behavior of a

member becoming inactive or unresponsive after joining the community. • Ghost-to-Checklist Conversion: A metric used in re-engagement to track the percentage of inactive members who complete the onboarding checklist after a re-engagement effort. • Icebreaker Roulette: A method using random prompts to encourage introductions or participation in community discussions. • Identity Card Challenge: An optional, gamified method for new members to post their introductions using visual templates (like Canva). • Impact Assessment (Feedback): Evaluating feedback themes based on how many members they affect, potential impact on engagement, required resources, and alignment with community goals. • KPI (Key Performance Indicator): A measurable value that demonstrates how effectively a company or community is achieving key objectives. • Leadership Health: A dimension of community health focused on mentor engagement, knowledge-sharing ratios, leadership pipeline development, and response quality. • Member Journey: A dimension of community health tracking progress through onboarding, new-to-active conversion, retention rates, and member progression. • Mentor Pulse Participation: A KPI for mentors measuring their participation in check-ins or feedback sessions. • Mentors: Experienced members who guide and support newer members, crucial for knowledge sharing and culture. • Mentees: New or less experienced members who are going through onboarding and seeking guidance. • Mid-Program Check-in Survey: A survey sent partway through a program or onboarding process to gather feedback from participants. • Needs Assessment Surveys: Surveys conducted to understand community needs and shape the development of upcoming programs or initiatives. • Net Promoter Score (NPS): A metric used to gauge customer loyalty, typically asked as "How likely are you to recommend [community/product] to a friend or colleague?" • Onboarding Checklist: A list of tasks or steps for new members to complete during their initial period in the community. • Pattern Identification (Feedback): Grouping similar feedback points and identifying emerging trends. • Participation Lift Calculation: A methodology for measuring the increase in member engagement or activity resulting from a specific experiment or initiative. • PM Mentality: The name of the community referenced throughout the sources, focused on product management. • Power Prompts: Weekly prompts (in Slack or Coda) designed to surface ambitious ideas and encourage discussion. • Psychological Safety Score: A metric within Community Culture indicating the extent to which members feel safe to share ideas and take risks without fear of negative consequences. • Qualitative Feedback Point: A piece of non-numerical feedback provided by a member, such as a comment or suggestion. • Re-Engagement Playbook: A set of strategies and templates designed to reach out to and reactivate inactive or "ghosting" members. • Re-engagement Response Rate: A metric tracking the percentage of inactive members who respond to a re-engagement effort. • Resource Utilization Tracking: Measuring how often and effectively community members use available resources (guides, templates, etc.). • Sentiment Score: A metric or qualitative assessment of the overall feeling or attitude expressed by community members. • SMART Goals: Goals that are Specific, Measurable, Achievable, Relevant, and Time-bound. • Stakeholder: Anyone influenced by, or having influence on, an organization, its people, products, or services, including members, mentors, and the core team in the context of a community. • Team: Refers to the core team supporting the PM Mentality community, involved in operations and initiative implementation. • Trello: A project management tool mentioned as a platform for tracking onboarding progress using columns and cards, integrated with the gamification system. • Warning Thresholds/Healthy Thresholds: Predefined values used in the CHI calculation to determine if a key indicator's current value is concerning or positive. • XP Points: Experience points awarded to members for completing certain actions or milestones, a core element of the gamification system.

PM Mentality Community Engagement Study PM Mentality Community Engagement Study Guide Quiz Answer each question in 2-3 sentences based on the provided source material. 1. What are the five core health dimensions used to calculate the Community Health Index (CHI) for the PM Mentality community? 2. Describe the calculation method for the Overall CHI based on the provided sources. 3. Identify two specific SMART goals outlined for the PM Mentality community's onboarding process. 4. What is the "3-Layer Cake Intro," and why is it used during onboarding? 5. Explain how gamification is incorporated into the PM Mentality onboarding process, citing at least one specific example. 6. According to the sources, what are mentors' key responsibilities and how is their performance tracked? 7. Briefly outline the five steps of the weekly feedback synthesis process used in the PM Mentality community. 8. Besides general engagement, what are two other categories of metrics tracked for the Community Engagement Specialist's role? 9. Describe the distinctive tone and voice found in the PM Mentality internal planning documents, and what purpose it serves. 10. What is the primary purpose of having re-engagement strategies and tactics for inactive members? Quiz Answer Key 1. The five core health dimensions are Engagement Vitality, Community Culture, Knowledge Exchange, Member Journey, and Leadership Health. These dimensions are weighted differently to contribute to the final CHI score. 2. The Overall CHI is calculated by first converting each indicator within the five dimensions to a 0-100 scale based on its current value relative to defined warning and healthy thresholds. Then, a dimension average is calculated from its indicators' scores, and the Overall CHI is the weighted average of these dimension scores. 3. Two specific SMART goals are ensuring 90% onboarding checklist completion within 72 hours of joining and achieving a 75% first-week activity rate. Another goal is to generate 1 qualitative feedback point per new member in the first week. 4. The "3-Layer Cake Intro" is a structured framework for new member introductions in the community. It encourages members to include "fun fluff," "substance," and "realness" in their introductory posts to facilitate more engaging introductions. 5. Gamification is integrated through XP points awarded for various activities like intro posts, reactions, and feedback. Trello labels and Coda views track XP and signify progress, using terms like "XP God" or "Just Hatched." 6. Mentors are responsible for guiding and supporting mentees, sharing knowledge, and fostering community culture. Their performance is tracked quarterly using KPIs such as Mentee Response Rate, First Engagement, Feedback Quality Rating, Mentor Pulse Participation, and Contribution to Knowledge Base. 7. The weekly feedback synthesis process involves Collection & Categorization, Pattern Identification, Impact Assessment, Action Planning, and Closing the Loop. This ensures feedback is systematically gathered, analyzed, prioritized, and acted upon with communication back to contributors. 8. Besides general engagement (# of intro replies), metrics are tracked for Experiments (engagement delta), Feedback (response count, actionable items), Learning Hub (resource usage), and Community Voice (blocker themes surfaced). 9. The internal planning documents use a playful, sarcastic, and high-energy tone, often using nicknames for the Community Engagement Specialist. This tone is a deliberate "antidote to boring onboarding guides" and aims to create a more engaging internal environment. 10. The primary purpose of re-engagement strategies is to reactivate inactive or "ghosting" members. This involves sequences of communication and incentives, aiming to bring members back into active participation and contribute to overall community health metrics. Essay Format Questions 1. Analyze the PM Mentality community's phased engagement strategy, specifically focusing on the transition from Onboarding & Initial Engagement to Developing Engagement & Feedback Loops. Discuss the key activities and goals associated with each phase and how they contribute to long-term member retention. 2. Evaluate the importance of the Community Health Index (CHI) within the PM Mentality framework. Explain how the CHI acts as a comprehensive metric and discuss the significance of its five weighted dimensions in providing a holistic view of community well-being. 3. Discuss the role of gamification in the PM Mentality community. Provide specific examples of how XP points, badges, and other gamified elements are used during onboarding and ongoing engagement, and analyze their intended impact on member behavior and habit reinforcement. 4. Examine the closed-loop feedback system implemented in the PM Mentality community. Describe the process for collecting, analyzing, and acting upon member feedback, and explain why this systematic approach is crucial for continuous improvement and building trust. 5. Analyze the distinctive tone and voice used in the PM Mentality internal planning documents. Discuss the intended purpose of this tone, how it contrasts with traditional documentation, and provide examples of how it is manifested in the source material. Glossary of Key Terms • 3-Layer Cake Intro: A structured framework for new member introductions, encouraging posts with distinct sections for "fun fluff," "substance," and "realness." • A/B Testing: A method of comparing two versions of something (e.g., a welcome sequence) to see which performs better. • Actionable Insights: Feedback or data points that directly inform or lead to specific changes or improvements. • Brag Bites: An encouraged activity for members to share accomplishments, often in a running thread or Coda view, promoting visibility and positive peer interaction. • Chat (or Chat Gods): Refers to the AI or conversational interface that provides feedback and generates planning documents, often with a sarcastic and informal tone. • Cohort Analysis: Tracking the behavior and retention of groups of members who joined around the same time to identify patterns. • Community Culture: A dimension of community health focused on aspects like sentiment, inclusivity, psychological safety, and alignment with community values. • Community Health Index (CHI): A single metric calculated from weighted dimensions (Engagement Vitality, Culture, Knowledge Exchange, Member Journey, Leadership Health) to represent overall community well-being. • Community Onboarding Master Kit: A comprehensive set of resources, goals, and templates designed to guide new members through their initial experience in the community. • Community Situation Responses (Skeleton Replies): Pre-drafted templates for addressing specific common situations or inquiries within the community. • Conditional Formatting: Using rules to automatically change the

appearance of data (e.g., cell background color) based on its value, often used in dashboards to indicate KPI health. • Coda: A collaborative document tool used for onboarding trackers, dashboards, content management, and tracking metrics. • Engagement Vitality: A dimension of community health measuring active participation, contribution rates, discussion initiation, and response times. • Experiment Hypothesis: A structured statement predicting the outcome of a specific change or initiative within the community. • Feedback Quality Rating (Peer): A metric used to assess the quality of feedback provided, often tracked for mentors. • FOMO Bomb: A tactic used in the re-engagement sequence, inviting a member to an exclusive event or mini-challenge to create a "fear of missing out." • Gamified Onboarding Tracker: A system, often built in tools like Coda or Trello, that uses game-like elements (XP, badges, points) to motivate new members during onboarding. • Ghosting: The behavior of a member becoming inactive or unresponsive after joining the community. • Ghost-to-Checklist Conversion: A metric used in re-engagement to track the percentage of inactive members who complete the onboarding checklist after a re-engagement effort. • Icebreaker Roulette: A method using random prompts to encourage introductions or participation in community discussions. • Identity Card Challenge: An optional, gamified method for new members to post their introductions using visual templates (like Canva). • Impact Assessment (Feedback): Evaluating feedback themes based on how many members they affect, potential impact on engagement, required resources, and alignment with community goals. • KPI (Key Performance Indicator): A measurable value that demonstrates how effectively a company or community is achieving key objectives. • Leadership Health: A dimension of community health focused on mentor engagement, knowledge-sharing ratios, leadership pipeline development, and response quality. • Member Journey: A dimension of community health tracking progress through onboarding, new-to-active conversion, retention rates, and member progression. • Mentor Pulse Participation: A KPI for mentors measuring their participation in check-ins or feedback sessions. • Mentors: Experienced members who guide and support newer members, crucial for knowledge sharing and culture. • Mentees: New or less experienced members who are going through onboarding and seeking guidance. • Mid-Program Check-in Survey: A survey sent partway through a program or onboarding process to gather feedback from participants. • Needs Assessment Surveys: Surveys conducted to understand community needs and shape the development of upcoming programs or initiatives. • Net Promoter Score (NPS): A metric used to gauge customer loyalty, typically asked as "How likely are you to recommend [community/product] to a friend or colleague?" • Onboarding Checklist: A list of tasks or steps for new members to complete during their 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a key indicator's current value is concerning or positive. • XP Points: Experience points awarded to members for completing certain actions or milestones, a core element of the gamification system.

□ Meeting Tracking Template

Meeting Title:

Date & Time:

Facilitator:

Attendees:

Location/Platform:

□ Agenda

1. Welcome & Objectives

- Brief overview of meeting goals.

2. Community Culture Updates

- New member introductions.
- Notable interactions on Slack, LinkedIn, Coda.
- Upcoming events or initiatives.

3. Engagement Experiments

- Review of recent experiments and outcomes.
- Discussion of new ideas for engagement.

4. Feedback Collection

- Summary of recent feedback received.
- Plans for addressing feedback.

5. Learning Experience Enhancements

- Updates on Coda hub improvements.
- Discussion on resource clarity and accessibility.

6. Community Voice

- Identification of blockers or unmet needs.
- Suggestions for new initiatives.

7. Action Items & Next Steps

- Assignments and deadlines.

☐ Action Items

Task Owner Due Date Status

☐ SMART Goals & KPIs

1. Build & Maintain Community Culture

- *SMART Goal:* Increase member engagement by 20% over the next quarter.
- *KPI:* Number of active participants per week.

2. Drive Engagement through Experiments

- *SMART Goal:* Implement 3 new engagement strategies monthly.
- *KPI:* Participation rates in new initiatives.

3. Collect & Translate Feedback

- *SMART Goal:* Conduct bi-weekly feedback sessions.
- *KPI:* Number of actionable insights gathered.

4. Shape the Learning Experience

- *SMART Goal:* Update 100% of learning resources by end of Q2.
- *KPI:* User satisfaction scores on resource usefulness.

5. Be the Voice of the Community

- *SMART Goal:* Identify and address 5 major community concerns quarterly.
 - *KPI:* Resolution rate of reported issues.
-

☐ Discussion Prompts

- Which community segments are most engaged, and why?
 - What feedback trends are emerging?
 - Are there any barriers to participation we need to address?
 - How can we enhance the learning resources for better accessibility?
-

For additional resources, you might find these templates helpful:

- [Smartsheet Project Management Meeting Agenda Templates](#)
- [ClickUp Meeting Tracker Template](#)
- [Lark Meeting Tracker Template](#)

Would you like assistance in customizing these templates further or integrating them into your preferred platforms like Google Workspace, Trello, or Discord?

Community Engagement Specialist Roadmap: From Setup to Success

Let me break down a practical roadmap for implementing your community engagement strategy with all the PM rigor it deserves. This isn't just about creating documents—it's about building systems that drive real results.

Phase 1: Foundation & Benchmarking (Weeks 1-2)

Key Deliverables:

- Establish baseline metrics across all 5 responsibility areas
- Set up integrated dashboard connecting Trello + Google Sheets
- Develop community health scoring system

Implementation Steps:

1. **Audit current engagement levels** across all platforms (capture your "starting point")
2. **Research industry benchmarks** for similar communities at your stage
3. **Build your measurement infrastructure:**
 - Create master Google Sheet with conditional formatting for at-a-glance health monitoring
 - Set up Trello integration using Zapier or native power-ups to feed data automatically
 - Implement tagging system for categorizing community interactions

Pro Tip: Don't get lost in vanity metrics. For a mentorship community, depth of engagement (quality of interactions) often matters more than pure volume (number of posts).

Phase 2: Experiment Framework Development (Weeks 3-4)

Key Deliverables:

- Create engagement experiment template with clear hypothesis structure
- Build feedback collection system across touchpoints
- Establish experiment review cadence

Implementation Steps:

1. **Design your experiment blueprint** (problem → hypothesis → test → measure → iterate)
2. **Set up lightweight feedback channels:**
 - Quick-pulse emoji reactions
 - Micro-surveys (1-3 questions max)
 - Conversation starter prompts for qualitative insights
3. **Create your first experiment backlog** (start with 3-5 ideas maximum)

Pro Tip: Small tests yield faster insights. Instead of overhauling your entire approach, isolate variables: test a new welcome sequence while keeping everything else constant.

Phase 3: KPI Activation & Optimization (Weeks 5-8)

Key Deliverables:

- Finalized SMART KPIs with leadership buy-in
- Integration of metrics into weekly/monthly reporting cycles
- First optimization actions based on early data

Implementation Steps:

1. **For Community Culture:**
 - Define specific "active participation" thresholds by member segment
 - Establish NPS or sentiment tracking methodology
 - Set up cohort analysis to track retention patterns
2. **For Engagement Experiments:**
 - Implement A/B testing framework for new initiatives
 - Create participation lift calculation methodology
 - Establish minimum viable sample sizes for conclusive results
3. **For Feedback Collection:**
 - Build insight categorization system
 - Establish feedback-to-action pipeline with SLAs
 - Develop closed-loop reporting for participants who provide feedback
4. **For Learning Experience:**
 - Implement resource utilization tracking
 - Create learning path completion metrics
 - Establish knowledge application success indicators
5. **For Community Advocacy:**
 - Set up issue tracking with resolution timeframes
 - Create initiative adoption measurement framework
 - Develop leadership action tracking system

Pro Tip: Use the 80/20 rule for your metrics. Identify the 20% of metrics that drive 80% of your community success, and prioritize those for deep analysis.

Phase 4: Automation & Scaling (Weeks 9-12)

Key Deliverables:

- Automated reporting workflows
- Playbooks for repeatable community processes
- Self-serve analytics dashboard

Implementation Steps:

1. **Set up automatic data population** in Google Sheets (via forms, Zapier, or APIs)
2. **Create Trello automation rules** for community management tasks:
 - Card creation for new member welcomes
 - Automated movement through experiment pipelines
 - Deadline reminders for engagement touchpoints
3. **Build reusable templates** for recurring community activities

Pro Tip: Document everything as you go. Your future self (and potential team members) will thank you for creating clear standard operating procedures.

Dashboard Integration: The Command Center

Your dashboard should unite all these elements into a single source of truth. Here's a practical structure:

1. Top-level scorecard:

- Overall health score (composite of key metrics)
- Trend indicators (up/down from previous period)
- Alert indicators for metrics falling below thresholds

2. Drill-down views:

- Member segment performance
- Platform-specific engagement
- Experiment status tracking
- Feedback theme analysis

3. Action center:

- Prioritized intervention opportunities
- Resource allocation recommendations
- Quick-win identification

Would you like me to elaborate on any particular phase or component of this roadmap? Or would you prefer I create a specific template for one of these deliverables to help you get started immediately?

Community Engagement Workflow Automations

This document provides concrete instructions for setting up powerful automations to streamline your community management workflows using Trello, Google Workspace, and Discord.

Google Sheets Dashboard Automations

1. Automatic Data Import from Trello

Setup Instructions:

1. Install the Trello Add-on for Google Sheets:

- In your Community Dashboard Sheet, go to Extensions > Add-ons > Get add-ons
- Search for "Trello" and install the official add-on

2. Create an import configuration:

```
=IMPORTTRELLOCARD("Board ID", "List Name", "Optional Card Filter")
```

3. Set up recurring imports for key metrics:

- In your sheet, go to Extensions > Trello > Schedule Refresh
- Set daily imports of active cards from your experiment boards
- Set weekly imports of completed cards for reporting

2. Conditional Formatting for Metric Monitoring

Setup Instructions:

1. Set up health indicators in your Executive Summary tab:

- Select your KPI cells
- Choose Format > Conditional Formatting
- Create rules for:
 - Green (>=100% of target): Background #b7e1cd
 - Yellow (80-99% of target): Background #fce8b2
 - Red (<80% of target): Background #f4c7c3

2. Create trend indicators:

- Select % change columns
- Set conditional formatting:
 - Positive change: ▲ in green (#0f9d58)
 - Negative change: ▼ in red (#db4437)
 - No change: ◆ in gray (#7e7e7e)

3. Automated Weekly Report Generation

Setup Instructions:

1. Create a report template in Google Docs

2. Set up Apps Script automation:

- In your Google Sheet, go to Extensions > Apps Script

- Create a new script named "weeklyReportGenerator"
- Paste this code:

```
function generateWeeklyReport() {
  // Get the template
  var templateDoc = DocumentApp.openById('YOUR_TEMPLATE_DOC_ID');

  // Create a new doc for this week's report
  var newDoc = DocumentApp.create('PM Mentality Weekly Report - ' + new Date().toLocaleDateString());

  // Copy template content to new doc
  var body = newDoc.getBody();
  body.appendParagraph(templateDoc.getBody().getText());

  // Get data from the dashboard
  var sheet = SpreadsheetApp.getActiveSpreadsheet().getSheetByName('Executive Summary');
  var data = sheet.getRange('A1:F10').getValues();

  // Replace placeholders with actual data
  // [Implementation details would follow...]

  // Email the report to team
  var emailTo = "team@example.com";
  var subject = "Weekly PM Mentality Community Report";
  var emailBody = "This week's community report is attached.";
  var pdfReport = newDoc.getAs('application/pdf');


  GmailApp.sendEmail(emailTo, subject, emailBody, {
    attachments: [pdfReport]
  });
}
```

3. Set a time-based trigger:
 - In Apps Script, click Triggers > Add Trigger
 - Choose weekly execution on Friday afternoons

Trello Workflow Automations

1. New Member Onboarding Automation

Setup Instructions:

1. In your Member Journey Trello board, click "Automation" > "Create Button"
2. Create a "New Cohort" button:
 - Name: "Create New Member Cohort"
 - Icon: 
3. Set the button actions:
 - Create a card in "New Member Cohort" list
 - Add a standardized checklist:
 - Send welcome messages
 - Create introduction thread
 - Schedule group orientation
 - First-week check-in
 - Add to resource access group
4. Set up a "When card is created in New Member Cohort" trigger:
 - Automatically assign to Community Engagement Specialist
 - Set due date for 1 week from creation
 - Add yellow "Onboarding" label

2. Experiment Pipeline Automation

Setup Instructions:

1. Create status change rules:
 - When card moves to "Currently Running":
 - Add "Start Date" to custom field with current date
 - Add standard "Monitoring" checklist
 - Send notification to team channel
2. Create measurement reminder:
 - When card has been in "Currently Running" for 7 days:
 - Add comment "Time for mid-experiment check-in"
 - Add yellow "Review Needed" label
 - Notify card owner
3. Create results documentation workflow:
 - When card moves to "Analysis Phase":

- Add "Results Documentation" checklist:
 - Record final metrics
 - Document key findings
 - Identify next steps
 - Update experiment log in Google Sheet

4. Integration with dashboard:

- When "Results" custom field is updated:
 - Run Zapier workflow to update Google Sheet
 - Create card in "This Week's Focus" on Community Management board to implement findings

3. Feedback Collection Automation

Setup Instructions:

1. Create recurring feedback cards:

- Use Butler command:

```
every Monday at 9:00 AM create card "Weekly Feedback Review" in list "Feedback Collection" with description "Gather feedback from the community and document findings for the week"
```

2. Set up issue escalation workflows:

- When label "Critical Issue" is added to a card:
 - Move to top of "Blockers & Concerns" list
 - Add all board members as watchers
 - Send notification to leadership channel
 - Create calendar event for review within 24 hours

3. Configure feedback closure tracking:

- When a card moves to "Insights & Actions":

☐ ENGAGEMENT SUPPORT PLAN (Slack Threads: 3+ Per Week)

☐ Weekly Goals

- 3 meaningful replies to mentee threads
- 1 initiated thread or check-in prompt
- 1 personalized DM follow-up based on a thread
- 1 piece of feedback collected (reaction, quote, or direct DM)

☐ *Bonus if you start a friendly roast war or quote someone in a way that makes them feel like the main character of the week*

☐ Engagement Tracker Template (Google Sheet / Coda / Notion)

Week	Thread Link	Type (Reply/Prompt)	Who You Engaged	Topic	Response Quality (1-5)	Feedback Noted	Follow-up Planned
W1	[Slack link]	Reply	@Elena	Burnout hacks	4	"Loved your take on pacing, thanks!"	DM to ask about blog
W1	[Slack link]	Prompt	Whole channel	"Toxic PM trait?"	5	Got 6 LOL reacts + 2 replies	Share best in #intros
...

Use emojis as engagement radar. If your post is crickets, you're being basic. Try again.

☐ Message Templates (Slack + Discord)

➤ Supportive Mentor-Style Thread Reply:

"Oof, that's a classic sprint spiral ☐. Been there. Curious—do you have a go-to ritual to reset when stuff gets chaotic? Asking for a 'friend' ☐"

➤ Sassy Check-in Prompt:

"Alright, thread lurkers. You've been watching in silence like it's reality TV. Time to drop your red flags as a PM. GO. ☐"

➤ Curiosity-Driven Feedback Bait:

"Quick pulse check ☐
What's been the weirdest thing you've *actually* enjoyed about onboarding so far? (Mine is stalking everyone's workflows)"

☐ BEST ENGAGERS TO STUDY + STEAL FROM

For Slack:

1. **@Stefano** – Obsessed with metaphors, makes even checklist updates sound like Shakespeare.
2. **@Tia** – Serial tagger + hype queen. Drops fire emojis like they're strategy.
3. **@Jules** – Asks *weirdly specific* questions that pull quiet folks out of hiding.

For Discord:

1. **@OtakuPM** – Reacts to *everything*, even when it doesn't warrant it. King of "???" and side-eye emojis.
2. **@ModMilly** – Drops memes with perfect timing. Her engagement ratio is unmatched.
3. **@NoiseEngineer** – Builds lore around members like "The Notion Witch" or "Sprint Goblin."

For LinkedIn:

1. **Rosie Sherry** – Community queen. Always replies like it's tea time.
2. **Erica Kuhl** – Shares real wins + asks subtle vulnerable questions.
3. **David Spinks** – Posts feel like open-ended brain pokes. People can't help but comment.

☐ Touch 'Em in the Soul (Without Being Creepy™)

Use this **3-Part "Touch-Point" Framework** in responses:

1. **Relate (shared struggle)**: "Ah, I've rage-quit retros over less."
2. **Reveal (mini story)**: "Last time I led a project like that, I accidentally caused a two-week Jira crisis."
3. **Re-engage (ask)**: "Curious how you framed that convo with your team?"

—
Wanna go next level? ☐

Let me build you a **custom Slack thread responder cheat sheet** with power openers, feedback bait lines, and emoji-as-signal decoding.
Or I can rig your **Discord bot** to serve random "engagement dares" like "Post a voice note of you reading your last sprint review in a dramatic tone."

Just say the word. Or blink. Or type like the chaotic overachiever you are.

Ready to throw this into your Coda tracker or want me to inject this right into the doc, Big Brain?

☐ Stage 1: Pre-Onboarding Prep

- ☐ **Account Setup:**
 - Send Slack + Coda invites at least 24h before start.
 - Pre-add to channels: #intros, #announcements, #mentor-match.
 - Auto-subscribe to Community Calendar.
- ☐ **Resource Pack Prep:**
 - Send welcome email with starter kit (Coda + Trello links).
 - Include intro post template, event schedule, and FAQ.
 - Add optional memes folder for ☐vibe setting☐.
- ☐ **Internal Prep:**
 - Assign onboarding buddy (mentor or team member).
 - Review mentee/mentor goals if known.
 - Pre-tag in Slack with customized welcome DM queued.
- ☐ **Expectations Alignment:**
 - Add new joiners to onboarding tracking sheet.
 - Ensure checklist is customized per role (mentee/mentor/staff).
 - Schedule 15-min intro sync within first 3 days.

☐ 1. Status Overview

- Total new members: [X]
- Onboarded within 72h: [X%]
- Activity in Week 1 (Slack + Event + Feedback): [X%]

☐ 2. Patterns + Highlights

- **Checklist Stalls:** [Platform / Mentorship Wait / Event Fatigue]
 - **Engagement Highlights:** [Funny Icebreaker, Meme Post, Great Intro, etc]
-

☐ 3. Blockers + Friction

- Slack access issues? DM bottlenecks?
 - Feedback fatigue or unclear prompts?
 - **Mentor response time >48h?**
-

☐ 4. Experiments

- = tested this
 - ↑ or ↓ in engagement?
 - Verdict: Keep / Kill / Iterate
-

☐ 5. Community Voice

- ☐ What people *loved*: [Summary]
 - ☐ What made them ☐: [Summary]
 - Are we living up to the vibe? Or just posting into the void?
-

☐ 6. Action Items

Task	Owner	Deadline
Improve Intro Prompt Variety	[Name]	[Date]
Mentor Onboarding Speed Boost	[Name]	[Date]
Feedback UX (form OR in-Slack emoji)	[Name]	[Date]

☐ EXECUTION + VISUALIZATION PLAN FOR THE KPI DASHBOARD

We're building:

- **KPI Dashboard (interactive + visual)**
 - Based on: **Coda** or **Notion**, whichever you're using (but I'll write it for Coda since your doc screams "Coda cultist")
 - Visuals: Progress bars, emoji indicators, auto-updating stats, etc.
-

☐ BASE STRUCTURE (Coda Tables Needed)

1. ☐ Member Data

Name Join Date Checklist % First Post Date Feedback Submitted Mentor Assigned Events Attended

2. ☐ Engagement Logs

| Member | Action | Date | Type (Post, RSVP, Feedback, DM, etc) |

3. ☐ KPI Tracker

Metric	Goal	Current	Status
Checklist Completion Rate	90%	Auto %	<input type="checkbox"/> / <input type="triangle-up"/> / <input type="checkbox"/>
First-week Feedback Rate	75%	Auto %	<input type="checkbox"/> / <input type="triangle-up"/> / <input type="checkbox"/>
Time-to-First-Post (<48h goal)	TRUE %	Auto %	<input type="checkbox"/> / <input type="triangle-up"/> / <input type="checkbox"/>
Mentorship Assignments in 72h	100%	Auto %	<input type="checkbox"/> / <input type="triangle-up"/> / <input type="checkbox"/>
Staff Suggestions Implemented % [Goal]		Manual	TBD

☐ AUTO-CALCULATIONS

Set up calculated columns to do the following:

- Checklist Completion Rate = Avg of checklist % from Member Data
 - First-week Feedback Rate = Count of "Feedback Submitted = ☐" / Total members
 - Time-to-First-Post = First Post Date - Join Date < 2 days? ☐
-

☐ VISUALIZATION

Use:

- **Progress Bars** for % goals
 - **Emoji Indicators:**
 - ☐ = On target
 - ⚠ = Needs attention
 - ☐ = Behind
 - **Conditional Formatting:**
 - Green = Above Goal
 - Yellow = Near Goal
 - Red = Failing harder than your high school crush's mixtape career
-

☐ BONUS FLAIR

- Embed GIF reactions for milestones (e.g. “☐ First post in <48h! Welcome aboard!”)
 - Add a filter for “Stuck Users” = Checklist < 50% AND No Engagement
 - Leaderboard for most engaging mentors (yes, competitive chaos mode ON)
-

☐ Coda Page Layout

Page: Onboarding KPI HQ

Header: ☐ Community Pulse

Sub-header: “If you’re not measuring it, you’re just hoping real hard.”

Sections:

1. ☐ Quick Stats Snapshot (using canvas formulas)
 2. ☐ KPI Table (use conditional formatting)
 3. ☐ Mentor Leaderboard
 4. ☐ Stuck Users Watchlist
 5. ☐ Staff Tasks Tracker
-

☐ NEXT STEPS TO SET IT UP

1. **Build tables:** Use the schema above in Coda.
2. **Add buttons:**
 - “New Member Entry”
 - “Log Engagement”
3. **Add formulas:**
 - Progress %, Time-to-Post, etc.
4. **Visuals:**
 - Add conditional formatting
 - Insert emojis + conditional icons

5. Set up syncs:

- Coda-Google Forms integration (for feedback auto-fill)
- Slack Zapier workflow to log posts/reactions automatically

☐ STAGE-BY-STAGE EXECUTION PLAN

(For Mentees, Mentors, and Team – separately, because apparently clarity *matters*)

☐ ♀ Mentees: "Help I just joined, what is this place??"

Day 0-1

- ☐ Receive Slack & Coda invite (automated)
- ☐ Added to Trello tracker (mentor match prepped)
- ☐ Get welcome email (includes intro post, checklist, Slack guide)
- ☐ Auto-Welcome Bot tags in Slack
- ☐ Checklist link in email + pinned in Slack DM

Day 1-2

- ☐ Reminder ping at 48h if checklist untouched
- ☐ Prompted for intro post using 3-Layer Cake OR Roulette
- ☐ Light engagement: react, poll, RSVP to event
- ☐ Listed in "Who's New" Coda & Slack thread
- ☐ Small mission: Comment/post in #random or #your-journey

Day 3-7

- ☐ DM follow-up from mentor
- ☐ Checklist at 50–90% (bot nags encouraged)
- ☐ 1 Slack comment/post minimum
- ☐ Feedback form filled (Google Form)
- ☐ Matched with confirmed mentor in system
- ☐ Added to "Starter Pack" or tagged in helpful threads

☐ Mentors: "You're the adult in the room (sorry)"

Day 0-1

- ☐ Notification of new mentee match
- ☐ Access to mentee checklist & Coda profile
- ☐ Mentorship intro DM within 24h (template provided)
- ☐ Confirm intro post published or help initiate one

Day 3-7

- ☐ Check in via Slack (1 DM or 1 public thread reply)
- ☐ Ensure mentee has 1 engagement action (comment/post/event)
- ☐ Submit mini-mentorship log (can be 2-sentence update)
- ☐ Flag issues or friction to community team

Ongoing (Weekly)

- ☐ Slack presence: 3+ thread support replies
 - ☐ Mid-season feedback via form or async check-in
 - ☐ Bonus: Nominate standout mentees for shoutouts
-

☐ **Team / Staff: "You run this circus"**

Daily / Ongoing

- ☐ Monitor automation flows (Slack, Trello, Coda)
- ☐ Manually DM if bots don't trigger (48h+ silence)
- ☐ Weekly sync: use Meeting Brief format
- ☐ Log drop-offs (checklist incomplete, no Slack activity, no intro post)

Weekly

- ☐ Update KPI dashboard (from Coda + Slack + Trello)
- ☐ Test 1 onboarding improvement per week (meme, badge, prompt)
- ☐ Share top intro post externally (LinkedIn, etc.)

Biweekly

- ☐ Onboarding review cycle: clean up stale checklists, reset dropped mentees
- ☐ Share "Voice of Community" digest with leadership (sentiment, issues, fun quotes)

☐ **DO THIS FIRST: Gamified Trello Flow**

Why? Because it locks in behavior, habit, and checklist dopamine fast. That onboarding flow needs to run like it's on rails with glitter and threats.

☐ **Trello Automation Templates:**

Columns:

- ☐ Welcome Brain Dump
- ☐ First 24h Wins
- ☐ 72h Missions
- ☐ Identity Challenges
- ☐ Ongoing XP

Card Examples:

- ☐ Post your intro in Slack (w/ button to Slack)
- ☐ Try "Icebreaker Roulette"
- ☐ Drop your Identity Card (link Canva)
- ☐ DM your mentor + screenshot it
- ☐ React in 3 threads

Automation:

- Card moves to ☐ when checklist completed
- When all 72h cards done → auto-tag as "Level 2 Initiate"
- Slack bot notification on Level Up (Zapier or Slack workflow)
- Weekly auto-email summary: your XP stats + a leaderboard tease

—

☐ **THEN: Canva Identity Card Generator**

This one is sexy, high-visibility, but **low retention impact** unless it's tied into Trello or Slack rewards.

Why do it second? Because without the Trello gamification layer, people just post pretty intros once and ghost us harder than your last situationship.

What you'll want:

- 3–4 Canva templates, editable, drag-drop
- "Post your card" call-to-action in Slack

- Tie submissions to leaderboard or badges (e.g. “Identity Unlocked”)

TL;DR for your big forehead:

Priority	Flow	Outcome	Automation Potential
<input type="checkbox"/> FIRST	Trello XP Tracker	Checklist Completion + Retention	HIGH
<input type="checkbox"/> SECOND	Canva Identity Card	Engagement + Vibes	MEDIUM

Now lemme know if you want:

- Pre-filled **Trello template board** with automation cheats
- Canva card generator embedded in onboarding email
- Slack leaderboard hack to auto-show “Level Ups”

Choose your chaos, Professor Spreadsheet ☐ ☐

🔪 Feedback on Your Edits:

☐ Tone:

Dead-on. That **"you got this, but also here's a glitter flamethrower in case you need it"** tone is just chef's kiss. Friendly? ☐ Motivating? ☐ Slightly unhinged? ☐ ☐ ☐

You're hitting that sweet spot between “competent cult leader” and “your cool older cousin who got out of a pyramid scheme.”

☐ Clarity & Flow:

Your bullet flow is so smooth it makes butter look clumsy. Everything reads clearly and in a digestible rhythm. I can actually picture the flow of new members getting absorbed into the system like it's a Pixar onboarding montage.

☐ BUTTTTT (yes, there's always a butt):

☐ “Powerful Intro Frameworks” Section:

You *nailed* the vibe, but it's a **little buried** at the bottom. That section is pure GOLD for driving engagement—it deserves to be teased earlier. Maybe in the **“First 72 Hours”** section as a mention? Like:

“Prompt them with a 3-Layer Cake or Roulette post (see Personality Frameworks below)”

Make them drool early, you know? ☐

☐ Experiments Section:

You're asking all the right questions—but what about a hint at **where** experiments get logged? Is it in Trello? Coda? Your brain's fourth dimension? Drop a link, a tag, or at least make a cheeky comment like:

“See: Lab Rats Log in Coda for live experiments”

☐ Gamification Mentions:

You're close to ☐ legendary tier ☐ but wanna go full Pokémon-evolution? Connect the **light challenges** from onboarding with the **XP/badge ideas** from growth hacks. Maybe suggest a challenge in week 1 → earns badge → shows up on Coda profile. Boom, instant dopamine loop.

☐ Minor Thingy:

“Mid-season feedback summary delivered” (under Mentors)

☐ What is mid-season? Is this a game show? A romcom arc? Just clarify it's like... bi-monthly or at the end of X week cycle or whatnot. Nerds like me wanna timeline that sucker.

☐ TL;DR for You, Queen of Organized Chaos™:

- ☐ Tease the 3-Layer Cake + Roulette stuff earlier!
- ☐ Drop a link or name for the experiment tracker
- ☐ Tie badges ↔ mini-challenges = serotonin bomb
- ☐ Define “mid-season” or prepare to be asked by a Slack gremlin

☐ Re-Engagement Playbook: "Return of the Ghosts"

For: Ghosted Members (aka Slack phantoms)
Role: Community Necromancer™
Mission: Resurrect engagement without sounding desperate (you already are)

☐ Step 1: Identify the Ghosts

- Criteria:
 - No Slack activity in 7+ days
 - Checklist under 50%
 - No response to mentor ping
 - Tag in Coda as: ☐ Ghost Pending
 - Auto-label in Trello: ☐ Needs Wake-Up Call
-

☐ Step 2: Re-Engagement Campaign (Multi-Touch)

☐ Day 1 — Soft Ping (Slack DM or Email)

Subject/Message: "We miss your chaotic genius ☐"
"Hey [Name], we noticed you haven't stirred the Slack cauldron in a bit. If life's wild, no sweat – just wanted to say your voice matters here (even if it's just memes)."

- Include 1-click shortcut: "Reactivate Checklist" / "Share a Win" / "Say Hi in #random"

☐ Day 3 — Meme Attack

Drop a "we miss you" meme or gif in DM.
Bonus: Use their intro post material (if any) to personalize the roast.

☐ Day 5 — Public Nudge (if appropriate)

- Feature them in "Member We Love" roundup or shoutout old intro.
- Use humor:

"Still wondering what happened to [Name]'s Notion addiction. Blink twice if alive."

☐ Day 7 — FOMO Bomb

Invite to exclusive event or mini-challenge.
"Secret challenge alert: only 5 invites, and you're on the list. Let's see what your ghost powers can do ☐♀"

Automation Layer

- **Ghost Tracker View** in Coda (Last activity + Checklist %)
 - Zapier Trigger:
 - If "No activity in 7d" → Slack DM
 - If "No checklist progress in 5d" → Email Reminder
 - Trello Automation:
 - Label "☐ Needs Wake-Up Call" triggers card comment from mentor
-

☐ Goals & KPIs

Metric	Goal
Re-engagement Response Rate	50%
Ghost-to-Checklist Conversion	30%
Post-Reactivation Slack Action	1+ action
Member Sentiment (qualitative)	1 comment per 5 ghosts

☐ Bonus Moves (AKA Witchcraft for Retention)

- **“Comeback Kid” Badge** for returning ghosts
- Mini-challenge: “Ghostbusters Club” – revive another ghost with a DM
- Slack channel: #resurrected-legends (stories of returning members)
- DM script from mentors:

“I was gonna give up on you, but your vibe was too strong to ignore. Prove me right.”

☐ Community Onboarding Master Kit (Coda Version)

☐ Trello Automation Tracker (for tasks and XP flow)

Columns for Onboarding Workflow:

1. ☐ **Welcome Brain Dump**
 - Add member info, make this a catch-all for initial intro prompts, mentor assignments.
2. ☐ **First 24h Wins**
 - Track small wins: Slack intro, event RSVP, early feedback submission. Card moves here automatically.
3. ☐ **72h Missions**
 - Critical “Level 1” tasks: Icebreaker post, mentor DM, check-in for engagement.
4. ☐ **Identity Challenges**
 - Gamified tasks for personality profiling: Identity Card, meme share, or 3-Layer Cake intro. Add to Coda form with custom fields.
5. ☐ **Ongoing XP**
 - XP tracker that rewards engagement: reacting to threads, commenting, responding in Slack threads.

Card Examples:

- ☐ **Post your intro in Slack** (link to Slack channel)
- ☐ **Try “Icebreaker Roulette”** (link to Coda icebreaker prompt generator)
- ☐ **Drop your Identity Card** (Canva link)
- ☐ **DM your mentor + screenshot it** (link to Slack DM)
- ☐ **React in 3 threads** (track engagement via Slack)

☐ Automation (via Zapier or Coda)

- **Checklist Completion:** Cards automatically move to "☐" when key tasks (intro post, mentor DM) are done.
- **Level 2 Initiate Tag:** After all 72h tasks are marked done, automatically tag as “Level 2” with email to confirm progression.
- **Slack Notification Bot:** Send DM when a member levels up.

Game Bonus:

- **Weekly Email Summary:** Sends XP stats and leaderboard highlights to encourage competition.
-

☐ Extra: Coda-Specific Elements

1. Member Tracking Dashboard (Coda Table)

- Track member data like time-to-first-post, feedback submission, and mentor engagement.

2. Slack Bot Sync (via Zapier)

- Automate notifications for intro post, feedback submission, and event RSVP reminders. When a member does something (like reacts in threads or posts), log XP in the Coda table.

3. Feedback Collection (Coda Form)

- After 72h, auto-prompt for feedback via Coda form embedded in your onboarding flow. Collect qualitative feedback from every new member!
-

☐ Bonus Features in Coda:

1. Canva Design Templates

- Embed your “Identity Card” template within Coda so new members can personalize it (auto-filled fields).

2. Slack Engagement Tracker

- Create a column that automatically tracks member engagement (posts, comments, reactions).

Now, if you’re asking how to *actually* get this in Coda:

1. Start a **New Doc** in Coda.
2. Use this outline, set up tables for each step, and then **link** those to automations in Slack or email (you know, Zapier, baby).
3. **Add buttons** for tasks like “Post Intro in Slack” to auto-submit tasks for members.

Step 1: Stop Copying Everyone Else

Yeah, you heard me. Stop watching *those* influencers who tell you they’ve figured it out. Stop mimicking every popular trend because you *think* it’ll make you cooler. You’re not a puppet, even if you sometimes *feel* like it.

Step 2: Take a Look at Yourself (For Real)

I know, it’s hard to even look at yourself with all the cringey stuff you’ve done, but **look inside**. What makes you laugh? What *annoys* you? What pisses you off so much you can’t shut up about it? You’re a walking *reaction machine*, so just start from there. Your voice is a mix of your values, quirks, pet peeves, and what you care about.

Step 3: Be Unapologetically You

Yeah, I’m gonna hit you with this one: Don’t *sugarcoat* it. No one cares if you’re “trying to be nice” all the time. You’re not a doormat, and you’re certainly not “just trying to fit in.” If your thoughts are loud, let them be loud. If they’re sarcastic or sassy, let them fly. Don’t mute your inner voice just to fit the mold, because guess what? Everyone else already does that and it’s boring.

Step 4: Use Humor as Your Weapon

What’s better than sarcasm? Nothing. Get used to it. Every time you drop a line, make it count. Use irony. Use exaggeration. Be dramatic. Get *real* comfortable with being misunderstood and “*cringe*.” It’s fun. You’ll find that when you don’t try too hard, you get more of that raw, authentic sound.

Step 5: Stop Giving a Damn About Approval

Listen up—everyone’s got something to say, but not everyone’s gonna *like* it. If you wait around for approval, you’ll be stuck forever. *Say it*. Let it *land*. If they laugh, great. If they don’t? Too bad. You don’t need to babysit their feelings.

Step 6: Iterate

You think you’ve found your voice? Yeah, right. You’ll be changing, tweaking, and *testing* out different tones, styles, and delivery methods for ages. And that’s great. Don’t expect to find perfection in the first draft of anything. Your voice will evolve with you.

So, when it’s all said and done, your voice is just *you* turned up to 11. You might feel a little weird at first, but trust me, it’s worth it. Now, do you think you can handle actually using it? Or are you just gonna keep second-guessing everything like usual? ☺

Clarify Your Brand Personality

You’re not some random, “neutral” entity. Your brand has to have character—no, not the boring kind, but the type that stands out, grabs attention, and has *presence*.

1. Ask yourself:

- **What is the vibe of the brand?**
- **Is it quirky? Professional? Casual? Funny? Serious?**
- **Is your community fun, supportive, edgy, or rebellious?**

Think of it like creating a character. If your brand were a person, how would they dress, talk, and act? Write down those adjectives.

Step 2: Define Your Community Tone

Your community is like your loyal army. They follow, they engage, and if you do it right, they defend you like you’re their best friend. You need to talk to them like you know them and understand them.

1. Questions to ask yourself:

- Do they want to be part of a cool club, or do they need a safe space to connect and vent?
- Do they like straightforwardness, or do they prefer a bit of humor and sass in the mix?
- How do they interact with each other? Do they post memes? Are they super supportive? Do they joke around?

Your community tone should mirror their behavior while amplifying it. You're creating a vibe, so don't be too formal unless that's your style.

Step 3: Consistency is Key

Now, let's get real for a second: You can't just be all over the place with your voice. One minute you're funny, the next minute you're serious? That's going to confuse everyone. You need consistency in how you talk, respond, and present your brand.

1. Create a voice guide that covers:

- Language style: Casual, professional, slang-heavy, or polished?
- Tone: Friendly, sassy, empowering, educational, or funny?
- Topics to avoid: What will *not* be tolerated or should be avoided?
- Personality traits: Smart, bold, witty, supportive, tough love?

Be sure you know exactly how to represent the brand every time. It's like a script. Not *too* rigid, but enough to be recognizable.

Step 4: Engage with the Community Like a Real Human

You're their leader, so if you're acting all robotic and distant, they'll sniff it out.

- Be conversational. No one likes a brand that speaks like a bot.
- Ask questions. Encourage feedback and make it feel like a conversation.
- Use humor (if that fits your vibe). Get in the game. Don't be afraid to *poke fun* or tease your audience.
- React in real-time. That's why your community needs to feel *alive*. Be there when something happens, and always give them something to respond to.

Step 5: Test, Learn, Adjust

If you're not testing your voice, you're just guessing. You need to see what works for your community and what doesn't. Just like a comedian tests jokes on an audience, you've got to figure out what hits and what falls flat.

- Look at engagement metrics: Which posts, comments, and responses are generating the most interaction?
- Experiment: Try different tones and styles. One post might be super edgy, while another is super positive. Find what works and adjust.
- Ask your community: Seriously, what's better than feedback from the people you're *trying* to impress? They'll tell you if you're killing it or if you sound like an awkward robot.

Step 6: Stay True to Your Core Values

Lastly, don't get caught up in trying to please everyone. Yeah, you'll make some people mad, but you can't please everyone. Stick to what your brand stands for and stay true to that.

- What's the mission of your brand?
- What kind of people do you want in your community?
- What do you want to inspire or make people feel?

Let these values guide your voice and make sure everything aligns. Don't just make noise for the sake of it. Your voice needs to serve your community's needs, not just throw out random words.

In a Nutshell

- **Brand Personality:** Know who your brand is. What adjectives describe it?
- **Community Tone:** Reflect the vibe of the people you want to engage with.
- **Consistency:** Stick to a voice guide.
- **Human Interaction:** Speak directly with people, no stiff corporate nonsense.
- **Test and Learn:** See what works and adjust.
- **Core Values:** Don't forget what your brand stands for.

Framework for Finding Your Brand & Community Voice

****Step 1: Audience Breakdown**

Before you even think about your voice, you *need* to know who you're talking to. Because if you talk to everyone, you're going to talk to no one.

Questions to ask:

- **Who is your community?**
 - Age, interests, lifestyle, location?
 - What do they **value** the most?
 - How do they talk to each other? Are they jokers? Do they keep it chill? Are they more serious?
- **What problems are they facing?**
 - **Emotional** problems (stress, anxiety, confusion)?
 - **Practical** problems (struggling with certain tools, looking for help, etc.)?

The more specific you get here, the better you'll define your voice. Remember: You're not just talking to an abstract "audience"—you're speaking to *real* people.

Step 2: Brand Purpose + Personality

Now that you know who you're talking to, let's get into what *your brand* actually is. What makes you stand out from the sea of endless wannabes?

Questions to ask:

- **Why does your brand exist?**
 - What's your **mission**? (Purpose, goal, big picture)
 - Why would people **care** about your brand in the first place?
 - **What personality would your brand have if it were a person?**
 - Think: Sarcastic? Professional? Funny? Snarky? Witty? Empowering? Friendly?
 - **Write down** adjectives that best describe your brand's personality. Try 5–10 at first.
-

Step 3: Voice Tone Experimentation (First Round)

Here's the fun part: You get to try on different voices! Don't worry, we're not gonna sit around waiting for divine inspiration. We're going to **test** it out and see what feels right.

Questions to ask:

- **How do you want to come across?**
 - Do you want to be the friend that always brings humor or the leader that's motivating?
 - Do you want to come off as **authoritative**, **relatable**, or **playful**?

Try different "tones" and experiment with:

- **Formal tone** – Friendly, but a bit more polished.
- **Casual tone** – Super chill, like texting your best friend.
- **Humorous tone** – Add snark, sarcasm, and wit. Think: funny memes and jokes.
- **Empathetic tone** – Super supportive and validating.

Experiment with these tones in your posts and responses, and see how your audience reacts.

Step 4: Engagement Style

This is **critical**, and you've gotta figure this out fast: *How* are you going to talk to people directly? Are you going to lead discussions? React to posts with humor? Or make it feel like a tight-knit family?

Questions to ask:

- **What kind of communication do you want?**
 - Are you more **active** (leading discussions, responding quickly), or more **reactive** (waiting for comments and jumping in)?
 - What will your **community interactions** be like? Will you respond with humor, advice, or even challenge people?

Try:

- **Open-ended questions** – “What do you think about this?” or “How does this resonate with you?”
- **Reacting to comments** – Be funny, direct, or even sarcastic if it fits.
- **Active participation** – Post polls, quizzes, memes, or challenges to engage people.

It's all about finding what makes people **interact** with your content.

Step 5: Messaging Guidelines & Filter

Now that you're starting to get a feel for things, you **need** to keep everything consistent. If you don't have any guidelines, things will go off the rails fast.

Build your voice guide (a mini cheat sheet for consistency):

- **What do you always do?**
 - Are you super *formal*? Do you always use **humor** in responses? What's your default tone?
- **What do you never do?**
 - Are there words or attitudes you won't use? (E.g., nothing “too harsh” or “too professional”)
- **What about certain topics?**
 - What's your **no-go zone**? If someone makes a rude comment, are you quick to put them in their place, or do you gently redirect?

Write this out and keep it visible—this will be your brand's **voice bible**.

Step 6: Continuous Testing + Feedback Loop

Now, you can't just stop here. Your voice is a living, breathing thing. It needs constant testing, tweaking, and feedback. If you stop, it'll get stale and boring. **No one wants that.**

Questions to ask:

- **What's working?**
 - Look at engagement rates. What kinds of posts get the most comments, likes, shares, etc.?

- **What isn't working?**
 - Are some responses falling flat? Is there a particular style that's **not resonating**?

Action Plan:

- **Adjust your tone:** If something didn't hit, change it up. Maybe you need to be a little more or less casual.
- **Refine your community interaction:** Maybe you need to engage a bit more or make your posts more **visually appealing**.

Repeat this testing phase every few weeks. You'll never "settle" on one voice; it'll evolve with your community.

In Conclusion:

- **Step 1:** Identify your **audience**.
 - **Step 2:** Define your **brand purpose and personality**.
 - **Step 3:** **Test** different tones.
 - **Step 4:** Establish your **engagement style**.
 - **Step 5:** Create a **messaging guide** for consistency.
 - **Step 6:** **Continuously test** and adjust based on feedback.
-

Framework for Attracting Mentor Personas with Your Brand & Community Voice

Step 1: Understand Mentor Needs & Desires (The Real Talk)

Mentors are **busy**. They're usually established, sought-after, and possibly tired of answering the same dumb questions. You're not just attracting anyone—you're attracting **valuable, experienced mentors** who want to engage with a *community* that's going places.

Questions to Ask:

- **What do mentors want?**
 - They're after **meaningful conversations** and **growth opportunities**, not just "likes" and "thumbs up."
 - They want to engage with **purpose-driven individuals** and communities. If they see potential and ambition in your brand, you'll stand out.
- **What problems are you solving for them?**
 - Maybe they want to pass on their knowledge and skills to the next generation, but only if they see the **passion and initiative** in the people they engage with.
 - Are you providing them with **valuable content** that helps them stay at the top of their game? Are you offering **insightful discussions** that challenge their knowledge?

Focus on **empowerment, growth, and challenge**. This is what mentors thrive on.

Step 2: Define Your Brand's Purpose as a Magnet for Mentors

Mentors will flock to brands that align with their **personal values** and **growth-oriented missions**. Don't just talk about how awesome you are—*prove it* with a laser-focused brand purpose that speaks to mentors' ambitions and professional goals.

Key Considerations:

- **Mentor-Focused Purpose:** What is your community's **bigger mission** that resonates with **leaders and mentors**? Do you focus on **leadership development**, **life-changing advice**, or **personal growth**?
 - Example: "We help passionate professionals who want to become better leaders by connecting with people who have been there and done that."
 - **Mentor Alignment:** Are you in a space that **mentors respect**? Think: education, entrepreneurship, leadership, development. The more **relevant** your brand's mission is to the mentor's field of expertise, the more likely you'll attract their attention.
-

Step 3: Craft a Voice that Appeals to Mentors—Professional Yet Relatable

Mentors want to feel like they're engaging with a brand that **values** their time and wisdom. They want to be respected, **but they also want authenticity**. Your community's voice needs to balance professionalism with **relatability**.

Voice Characteristics to Adopt:

- **Professional, but not stuffy:** Mentors don't want to feel like they're being lectured or talked down to. Keep it **authentic** and **respectful** but still **approachable**.
 - **Challenge and Inspire:** Don't just praise the mentor's advice—actively **ask for** it and **value their experience**. Engage them with **questions** that show you're open to learning and growing.
 - Example: "We're curious, @mentor_name—how would you approach this challenge?" Or, "Your thoughts on this, @mentor_name, are worth a million to us. What's your take?"
 - **Supportive:** Always support their contributions and frame the community as a **collaborative space**. Make them feel like a **key player**, not just a **resource**.
-

Step 4: Create Conversations that Attract Mentors

Mentors want to engage, but they don't want to waste time in **shallow interactions**. Your discussions need to be **high-caliber**, interesting, and **stimulating**—no fluff. Show them you're worth their time.

What Should You Discuss?

- **Advanced Topics:** Mentors love to talk about what they've learned over the years. Craft conversations around **real-world challenges**, **strategies**, and **life lessons**.
 - Example: "What's the biggest lesson you've learned in your career that most people overlook?"
 - **Open-Ended Challenges:** Don't be afraid to **ask them to share wisdom**. Use **thought-provoking** questions that require deep reflection.
 - Example: "In your opinion, what's the best way to prepare for failure, and how can young professionals bounce back from it?"
 - **Ask for Mentorship:** Yes, straight-up ask for it, but with **respect**. Frame it as an opportunity for them to pass on their knowledge to people who value it.
 - Example: "We'd be honored if you could share your perspective on [topic]. What advice would you give someone starting out?"
-

Step 5: Content That Resonates with Mentors

Your **content** isn't just for engagement—it's a powerful tool to **attract** mentors. You need to create content that speaks to their **interests**, **values**, and **expertise**.

Content Ideas:

- **Mentor Spotlights:** Feature mentors in the community. Ask for their advice and insights. This **highlights** their expertise and gives them the chance to **showcase their value**.
 - Example: "We were lucky enough to chat with @mentor_name about how they navigated the toughest challenges in their career. Here's their incredible advice."
 - **Thought Leadership Articles:** Post deep dives into areas where mentors can contribute their knowledge and experience. Ask them for their **opinion** on a trending issue.
 - Example: "We're discussing the future of leadership development. Here's where we think it's headed. What are your thoughts on this, @mentor_name?"
 - **Q&A Sessions with Mentors:** Host Q&A sessions where mentors can answer the community's burning questions. This gives them **visibility** and positions them as a **trusted expert**.
-

Step 6: Make Engagement Effortless and Rewarding

Mentors are busy, so don't expect them to just pop in for a chat without a **reward**. If you want to keep them engaged, you need to create **systems** that respect their time while still offering value.

Ways to Engage:

- **Mentor-Exclusive Spaces:** Create a **special section** in your community where mentors can discuss ideas, share resources, or just network. Make this space a **valuable reward** for their time.
 - **Recognition:** Publicly recognize **mentors' contributions**. Give them **credits** for sharing their expertise, whether through shout-outs or featuring them in newsletters.
 - **Collaborative Content Creation:** Don't just ask them for advice—ask them to **collaborate** on content like blog posts, videos, or webinars. This lets them contribute at a higher level, and they'll feel more involved.
-

Step 7: Keep Iterating and Refining

Finally, mentors aren't going to stick around for the long term if they don't feel their contributions are valued. You've got to **refine** your approach continuously based on their feedback.

What to Track:

- **Engagement Levels:** Are mentors actively engaging in discussions? Are they contributing ideas, or do they just pop in and leave?
 - **Content Performance:** Are the posts where you tag mentors getting more attention? Do their responses lead to deeper discussions in the community?
 - **Feedback:** Ask mentors for feedback. Be open to their suggestions for how the community can improve.
-

In Conclusion:

To attract **mentor personas**, you need to:

1. **Understand their motivations** (value growth, meaningful interactions, leadership).
2. Create a **professional yet approachable voice**.
3. Foster **high-level discussions** that challenge and inspire.
4. Produce **content** that resonates with their expertise and allows them to shine.
5. **Respect their time** by offering meaningful recognition and opportunities for engagement.

Bonus Tip: Make sure you're consistent! Mentors are busy and will bounce if they don't see **continuous** high-quality interactions. Keep the quality up, and they'll come back for more.

Now, go get yourself a mentor, and stop wasting my time. ☺

1. Value Growth

Mentors want to feel like they're **growing** personally and **professionally**. It's not just about *passing on knowledge*—it's about **being part of something bigger**, something that challenges them and makes them rethink their own strategies.

Why Does This Matter?

- **Growth = Relevance:** Mentors want to stay relevant. They're constantly looking for new ways to improve their skills, perspectives, and understanding of their industry.
- **Legacy and Impact:** They want to leave a **lasting legacy**, which is why they seek **value growth**—not just in themselves but in the people they mentor too. Helping others grow reflects back on their ability to grow.

How to Tap Into This?

- **Provide Learning Opportunities:** Create spaces in your community where mentors can also be **challenged**. Give them **advanced discussions** or **new perspectives** they might not have thought about. This way, they get to engage in their own **growth** while helping others grow.
 - **Content That Pushes Boundaries:** Share thought-provoking content that challenges their current thinking. For example, ask them to tackle "What's the one thing that's changed your perspective in the last year?" or "What's the most underrated trait of effective leadership?"
-

2. Meaningful Interactions

Mentors don't want to be **background noise** or just **answers on demand**. They want **authentic conversations** with people who value them—not just **followers**, but people who are genuinely interested in **what they have to offer**.

Why Does This Matter?

- **Impact Over Quantity:** A mentor wants fewer but **higher quality** interactions that feel **purposeful**. They want to see the fruits of their labor in the form of **real growth**, not just surface-level exchanges.
- **Recognition:** They want to know they're making a **difference**. Meaningful interactions show them that their time and advice are being **valued** and **used**.

How to Tap Into This?

- **Ask Deep Questions:** Engage them with questions that require thoughtful, reflective answers. Don't settle for "What's your advice for this?" Instead, go for "What's the toughest challenge you faced early in your career, and how did you overcome it?"
 - **Real Conversations, Not Just Soundbites:** Instead of treating mentors like **answer machines**, engage them in **conversations** that reflect the **depth** of their experience. Get into a back-and-forth dialogue where you can learn from them **and** they can learn from others.
-

3. Leadership

Mentors are, by nature, **leaders**. They've got the experience, they've earned the trust, and they've faced their own challenges. Their role isn't just to give advice, but to **inspire, empower, and guide** others toward becoming **better leaders** themselves.

Why Does This Matter?

- **The Power of Influence:** They're not just teaching—they're shaping the future. They want to **empower others** to lead in their own right, ensuring that the next generation has the tools and **skills** to take the torch.
- **Self-Reflection and Accountability:** By mentoring, they're **reinforcing their own leadership**. They're constantly learning what makes others tick, which challenges their own views and hones their leadership.

How to Tap Into This?

- **Encourage Leadership Development:** Your community should emphasize **leadership skills**. Create content or spaces for discussions around **leadership** and **team-building**, and ask your mentors to lead those conversations.
- **Mentorship as a Two-Way Street:** Allow mentors to feel like they're **developing** as much as the people they mentor. Show them how their leadership **grows** as they teach others. When they feel like they're **improving** as leaders, they're more likely to stay engaged and invest their time.

In Summary, Here's What You Need to Know:

1. **Value Growth:** Mentors are looking for **personal and professional growth**—they want to feel like they're **constantly evolving** and their time is spent on people who are serious about growth.
2. **Meaningful Interactions:** They crave **authentic, high-quality interactions**. It's not about quantity—it's about leaving a **lasting impact** on people who appreciate their guidance.
3. **Leadership:** Mentors are **natural leaders**, and they want to be **empowered** and respected. They're interested in **inspiring** others to be leaders as well.

□ Key Voice Tweaks to Apply Throughout

1. Professional

- Clear, concise language with structured headers and bullet points.
- Use active voice and action-oriented phrasing.
- Tone is confident but not overhyped.

2. Approachable

- Keep the fun elements (like emojis and playful headers), but balance them with clarity and purpose.
- Soften aggressive humor—keep it quirky and upbeat instead of snarky or chaotic.
- Use friendly, inclusive language like “you’ll find,” “we recommend,” “feel free to.”

□ Example Refinement

Original:

Why? Because it locks in behavior, habit, and checklist dopamine fast. That onboarding flow needs to run like it's on rails with glitter and threats.

Refined:

Why? Because it builds momentum, habits, and early wins. Think of it as an onboarding flow on rails—with a little sparkle and a lot of structure.

Original:

Ensure checklist progress: 50% completion target
Add to "Who's New" Coda view or Slack thread
Assign light engagement challenge: post or comment in #random or #your-journey

Refined:

- Target 50% checklist completion within the first 72 hours
- Highlight the member in the “Who’s New” section on Coda or Slack
- Invite them to join a light engagement challenge (e.g. post in #random or #your-journey)

If you'd like, I can go through the whole document and rewrite the tone consistently to hit this balance of pro + approachable. Want me to start with a specific section or the whole thing? ☺

□ □ Level-Up Discussions: Thought Leader Sparks

For the bold brains who joined to *build* something — not just vibe in the corner.

□ Goals:

- Surface ambitious ideas early
- Create space for constructive friction
- Empower new members to contribute meaningfully, fast

□ Implementation Plan:

1. Weekly Power Prompt (Slack Thread or Coda Embed)

Drop a high-voltage question like:

- “What’s one sacred PM ritual you think is actually BS — and why?”
- “If you had unlimited budget and zero stakeholders, what community experiment would you launch tomorrow?”
- “What’s one ‘unpopular truth’ about leadership that you’ve learned the hard way?”

2. Curated Micro-Forums (Opt-In)

Auto-tag newcomers by interest (via onboarding form or intro post) and invite them to:

- **Mini-Think Tanks** (small group DM or private thread): Rotate topics weekly
- **Lightning Rants Sessions** (15-min calls): Everyone gets 3 minutes to provoke the room

3. High-Stakes Hot Seat

After week 1, invite standout members to:

- Present a controversial opinion or idea
- Get rapid-fire feedback (with emoji-only reactions, live thread)

4. Badge Incentives: “Contrarian Catalyst” / “Deep Diver” / “Idea Grenadier”

Award badges for:

- Challenging a popular opinion (respectfully)
- Sparking a 20+ comment thread
- Offering a solution nobody saw coming

5. “Mentor vs Mentee Debate Nights” (Quarterly)

Have newbies and mentors go head-to-head on spicy topics.

Example debate: “Agile is just waterfall in disguise with a fancier hat.”

Wanna add this to the doc? Want me to rewrite it in your tone, sprinkle more glitter, or turn it into a systemized block like the others? Or are you scared the discussion's gonna be too advanced for your soft lil brain to handle, hmm? ☺

□ ADD: “Shine Zone” Section (New Members’ Brag Board)

□ Why?

Turn the spotlight on them early. Recognition creates retention. It also filters high-signal talent straight into the core community radar.

□ Section Title: “Brag Bites: Show Off Your Spark”

Add to Stage 3 or Bonus section.

Instructions for new members:

"Drop 1 screenshot, link, or voice memo that shows off something you're proud of—big or small. Did you run a killer retro? Build an internal tool? Invent a Slack emoji taxonomy? THIS IS YOUR MOMENT."

Then add a running thread or Coda view with:

- □ Name
- □ Brag Bite
- □ Peer Shoutouts
- □ Tag: Skill or Theme (“Product Ops,” “Meeting Magic,” “Unicorn PM”)

□ ADJUST: Feedback Form Prompts to Let Them Flex

Current Goal: Get 1 qualitative feedback point per new member.

Update the form to include “Let Us Brag About You” prompts:

- “What’s something weirdly specific you’re amazing at?”
- “What should people come to you for?”
- “What’s one challenge you’ve crushed that others might struggle with?”

Then you can:

- Surface this in onboarding highlights
- Auto-mention them in relevant future convos (via Slack bots or Coda triggers)

☐ INSERT: “Mentor Spotlight Moments” in Slack

Encourage mentors to post short “Mentor Spotlights” where they praise something *specific* about their mentee publicly after 72h.

Example format:

☐ **Mentor Spotlight:** [@Name] This week’s dopamine injection: [Thing they did]. ☐ You better keep an eye on this one. ☐ ts.

☐ Силни страни (и не, не говорим за трицепсите ти от copy-pasting)

1. Ясен, структуриран, визуално приятен формат.

Сериозно, ако това беше конкурс за най-много bullet points, щеше да вземеш злато и да си направиш трофей с Notion лого.

2. Глас и тон:

Браво, Nerdzilla. Имаш one consistent voice — хем забавен, хем целенасочен. Пак си въведа тази полу-саркастична, meme-friendly стилистика, която действа като антидот на скучните onboarding гайдове.

3. Епичен use на gamification:

Level Up системата в Trello, XP статистики, мини-челинджи... буквално се усеща като onboarding RPG. Готино, ако не броим факта, че хората ще се чувстват виновни, ако не направят интро поста си като haiku в рима.

☐ Облаци на хоризонта (а.к.а. къде започва срама):

1. Прекалено дълго за реалния attention span на новите.

Говорим си за хора, които имат 13 отворени таба и Slack ping-ове на всеки 6 секунди. Това не е „Onboarding Kit“, това е **Community Bible 3.0**.

☐ Suggestion: Раздели го на bite-sized versions — „Starter Pack“, „Next Level“, „Mentor Guide“, etc.

2. Къде е "Why Should I Care"?

Сякаш липсва мотивационен луп — какво ще спечели потребителят, ако изкара onboarding-a като champion?

☐ Suggestion: Добави секция „What's in it for you?“ – хората искат слава, връзки, и... Slack emoji реакции. Направи го ясно.

3. Вътрешният Markdown meeting brief... сях.

Между меметата и Icebreaker Roulette, това звучи като Notion документ, който някой е кръстил „Final-Final-2-LAST-update-v7.md“.

☐ Suggestion: Или го вкарай в същия tone-of-voice (с леки roast-ове и flair), или го изнеси в отделен boring-but-useful internal doc.

☐ UX Nerd Feedback (за Queen Miss Brainiac™):

- Имаш 234783 идеи, но трябва малко **flow control** – къде започва човек, къде свършва, и какво следва нататък?
- Някои секции могат да са collapsible или под формата на tabs / toggles, ако го качиш в Coda/Notion.
- Trello + Slack + Coda = ☐ ☐ Context switching hell.

Може ли да има one-pager или Command Center, който агрегира важните действия?

🐱 За финал – Roast Section™:

- “Welcome Brain Dump”? Това име звучи като community onboarding след хранително натравяне.
 - „Gamified flow с glitter and threats“? Явно ти е останал PTSD от корпоративен onboarding с PowerPoint от 2009.
 - „Find your PM twin!“ – чудесна идея, ако искаш хората да rage quit още първата седмица, щото нямат съвпадение.
 - “Share a haiku”? Бе, ти хора ли онбордваш или ги караш да кандидатстват в Hogwarts?
-

☐ Toolkits & Resources

☐ Mentor Resource Pack

- 1-pager: how to support new members in their first 2 weeks
- Sample prompts to use if mentee is quiet or ghosting
- Quick FAQ: where to find stuff, how to explain onboarding

☐ Member Starter Pack

- Slack etiquette cheatsheet
- Coda how-to guide (with gifs)
- Top 3 threads to read & react to
- Calendar sync button
- “Who to follow” recs for community leaders

☐ Community Team Ops Manual (internal)

- Roles & response time expectations
 - How to escalate tech or access issues
 - Feedback loop protocol
 - Weekly check-in ritual prompts
-

☐ Outro: What Success *Feels* Like

If we do this right...

- People show up feeling like they belong within *days*, not weeks.
- Newbies say, “*Wait... this feels like my kind of weird.*”
- Mentors feel proud they made a real dent.
- Team stops spending hours chasing people—energy goes into leveling them up.
- The community builds momentum instead of bottlenecks.

And you? You get to brag that your onboarding doesn’t suck. 😊

Let’s make ‘joining’ feel like ‘arriving.’

#MicDrop ☐

Let me know if you want a stripped-down Notion version or a printable PDF too 😊

☐ Still Needed to Finish This Beast:

1. ☐ Retention & Re-Engagement Templates

- Pre-built DMs or email nudges for Week 3+ (“Where ya at?” check-ins)
- Templates for inactive members (“We miss you + quick survey link”)

2. ☐ Mentor Toolkit

- Mini Guide: “How to be a decent mentor without losing your soul”

- List of DM prompts for mentor follow-ups
- How to spot a ghost (and when to reassign mentees)

3. ☐ Persona-Based Onboarding Variants

- Different tracks/templates for: async lurkers, loud joiners, event chasers
- Slight tweaks to checklist flows or welcome copy based on user type

Oh, look! Personalization? Never thought you'd get that fancy... how are we still alive from the shock?

4. ☐ Feedback Loop System

- Where do feedback form responses go? Who reads them? When do we act on them?
- Visual dashboard in Coda or Notion for quick skim of top pain points

5. ☐ Event-Driven Onboarding Tactics

- How to align onboarding around major launches or events (event-first flow!)
- Urgency template: "You joined *just* in time for X..."

6. ☐ Progression / Rewards System

- Define Levels (Level 1 = onboarded, Level 2 = contributed, etc.)
- Badges, role updates, or feature privileges
- Can your Trello zap actually crown them "Meme Wizard"? Yes? Good.

☐ Персонализиране на Community Onboarding Master Kit (а.к.а. да не е за работи без душа)

1. Tone Customization: "Personality Sync Injection™"

Добави раздел за избор на стил/тон, който новодошлите могат да изберат – примерно:

Choose your onboarding flavor:

- ☐ *Wholesome & Chill* – gentle nudges, no pressure, warm vibes
- ☐ *Spicy & Bold* – sass, humor, roast-style love
- ☐ *Nerd Mode* – deep dives, frameworks, & productivity hype
- ☐ *Gamified Chaos* – unlock XP, complete dares, chase dopamine

☐ Приложи:

- Промени съдържанието на DM, бота, и първото интро според стила.
- Бонус: може дори глас или емоджи тема в Slack да върви с избора (чист mindfuck за скуката).

2. Custom Icebreaker Generator v2.0™

Всеки onboarding стил получава свои уникални prompts:

- **Spicy & Bold:**

“Какъв е твоят cringe productivity flex?”
 “Нещо, което мразиш, но правиш, щото си 'отговорен възрастен'.”
- **Wholesome & Chill:**

“Какъв vibe искаш от тази общност?”
 “Последното нещо, което те накара да се усмихнеш?”
- **Nerd Mode:**

“Любим productivity tool и защо е по-добър от всички останали?”
 “Ако имаше API за приятелство, какво би включвал?”

3. Mentor-Matching по стил

Това да пратиш луд extrovert с introvert, дето иска просто да lurk-не тихичко? *Тотален fail.*

Какво правиш:

- Лек стилев тест в onboarding формата → tag в Trello → assign mentor със сходен стил.
 - Името на ментора също може да е в тона:
 - “☐ Chief Sass Officer”
 - “☐ Calm Buddy”
 - “☐ Fellow Framework Goblin”
-

4. Intro Templates по персона

Добави pre-filled пост шаблони според vibe:

For Spicy People™:

“I’m [Name], I joined for the chaos, stayed for the memes. My red flag? I ship sprints without QA. AMA.”

For Nerds:

“Hey, I’m [Name], current obsession: building Zettelkasten in Notion. I’m here to find my thinking tribe.”

For Chill Beans:

“Hi everyone ☐ Just happy to be here. Hoping to learn, vibe, and grow together ☐”

5. DM Automations w/ Mood Matching

- Автоматизираните съобщения да не звучат като писани от бот с лоботомия.
 - Пример за Spicy Welcome DM:

“Yo [Name]! We saw your form and instantly knew you’re a menace (in a good way). Your XP bar starts *now*. First quest: roast yourself in #your-journey. Need help? Your mentor [MentorName] is equally unhinged.”
-

6. Leaderboard by Personality Zone

- Не просто leaderboard – *кастъмизиран*.
 - Spicy folks → “Chaos MVPs”
 - Chill folks → “Vibe Keepers”
 - Nerds → “Big Brain Club”
-

☐ Wanna Go Too Far? (Ofc you do.)

- Анимирани Slack реакции според персоналността
 - Persona-based badges:
 - “Lurker Supreme”
 - “Notion Priestess”
 - “Chaos Consultant”
 - “Emoji Abuser”
 - Мемефикация на системата: всеки intro пост unlock-ва мем с “какво те очаква” стил
-
-

☐ Ultimate XP Tracking Loop™ (Trello x Slack x Coda Integration Layer)

☐ Weekly XP Cycle (Coda-Driven)

XP Inputs (Log to Coda automatically):

- ☐ Slack Activity:
 - +10 XP: Intro post
 - +5 XP: React to a thread
 - +15 XP: Comment in #random or #your-journey
- ☐ Mentorship:

- +20 XP: DM mentor + screenshot (auto-track via upload form)
- +30 XP: Respond to mentor DM
- ☐ Feedback & Forms:
 - +25 XP: Submit first feedback form
 - +5 XP: Submit suggestion/idea
- ☐ Event Participation:
 - +15 XP: RSVP
 - +25 XP: Attend + comment in thread

Weekly Bonuses:

- +50 XP: 72h Checklist fully complete
- +20 XP: 3+ thread engagements in one week
- +10 XP: Posted a meme or something funny

☐ Gamified Labels in Trello (Auto-Update via Coda Stats)

Label Name	XP Threshold	Slack Bot Behavior
<input type="checkbox"/> "Newbie Hatchling"	0–50 XP	Welcome ping + “Try your 72h Missions!”
<input type="checkbox"/> "Level 2 Initiate"	51–120 XP	Bot sends “you leveled up!” gif + next challenge card
<input type="checkbox"/> "Momentum Mage"	121–200 XP	Add to shoutout queue; unlock Icebreaker Pro prompt
<input type="checkbox"/> "Core Cult Member™"	201+ XP	Personalized DM + invite to be a Mentor-in-Training

☐ Slack Automation (via Zapier / Workflow Builder)

- **Every Sunday:**
 - Bot posts XP leaderboard in #general
 - Top 3 get emojis next to names, e.g. 🏆🏆🏆
 - “XP Gainers of the Week” shoutout
 - **Every Level Up:**
 - Auto-DM with reward (e.g. exclusive resource, meme badge, or mini challenge)
 - Public celebration option → one-click “Flex in #wins” button
-

☐ Coda Dashboard Views (Auto-Update)

- **Member XP Profile View:**
 - Name | XP | Level | Last Activity | Slack Handle
 - **Mentor Tracker:**
 - Mentee XP growth over time
 - Mentor Engagement (response rate, DM activity)
 - **Engagement Heatmap:**
 - XP by Week / by Slack Channel / by Action Type
-

☐ Habit Reinforcement Design (a.k.a. Nerd Bait)

- ☐ **Variable Rewards:** Mystery XP drops (10–30) for surprise actions like reacting to a new post or sharing a meme.
 - ☐ **Micro-Challenges:** Random popup card each week (e.g. “Drop your current workflow in a haiku = 20 XP”)
 - ☐ **XP Streak System:** Daily micro-win actions (e.g. “log in + react = 5 XP”) tracked for streak rewards at 3, 5, 7 days.
 - ☐ **Public Visibility:** Add “XP Stats” embed in the #starter-pack Slack thread + pin top gainers in Trello leaderboard
-