

The community leader's toolkit

A working guide to community use cases, the KPIs that prove them, and the CRM wiring that turns activity into pipeline evidence. Fillable: type in it or print it.



USE CASES

One community, many ways to create value

Community earns discovery and demand before the sale, then compounds retention and advocacy after it.

Eight use cases, split by where they pay off.

BEFORE THE SALE

**Owned answers and AI visibility**

Public questions and answers get indexed and cited. Buyers researching with AI meet your customers' words on your domain.

**Advocacy and social proof**

Member stories and reviews feed campaigns with proof the vendor didn't write.

**Demand capture and CQLs**

High-intent questions from prospects become community-qualified leads, with the context attached.

**Events that keep working**

The conversation has somewhere to live afterward, so a one-hour event captures demand for months.

AFTER THE SALE

**Onboarding and education**

New customers self-serve the first-90-days questions instead of queueing for support.

**Adoption and retention**

Usage questions and accounts gone quiet surface while there's still time to act.

**Expansion signals**

Members asking about seats, plans, or new use cases flag readiness before the QBR does.

**Brand and belonging**

Customers who feel part of something renew like it, and say so in public.

Which two use cases matter most right now?

Use case one

Use case two

WHY NOW

Answers become an acquisition engine

Three market shifts changed how buyers discover and decide. Each one makes an owned, public answer surface worth more.

73%

of B2B SaaS marketing leaders rank word-of-mouth as the top influence on vendor consideration.

Wynter, 2024

94%

of B2B buyers used an LLM during their most recent software purchase.

6sense, 2025

68%

of US Google searches end without a click.

SparkToro / Similarweb, 2026

The discovery loop

1**A member asks a question**

A real task, in the customer's words.

**2****The best answer gets selected**

Named author, current version, one canonical home.

**3****Search and AI surface the page**

Public, indexed, and citable on your domain.

**4****New buyers discover the brand**

Some sign up. Some join and ask the next question.

----- Every resolved thread keeps working after it's posted, and the loop starts again. -----

ONE TO MANY

Ads and content scale reach, and everyone knows the vendor wrote it.

ONE TO ONE

Sales and CS build real trust, one conversation at a time.

MANY TO MANY

Customers helping each other in public. The only channel where trust scales.

MEASUREMENT

The KPI menu

Pick three numbers: a leading indicator you can move this month, a channel KPI you report monthly, and the executive metric it ladders to. Where each number lives is listed with its lane.

🔍 Acquisition and visibility

LEADING INDICATOR

Indexed answer pages, search and generative AI impressions

CHANNEL KPI

Community-sourced visitors and signups

EXECUTIVE METRIC

Community-sourced pipeline

LIVES IN

Search Console, GA4, your CRM

🔗 Demand capture

LEADING INDICATOR

Prospect questions answered within a day

CHANNEL KPI

Community-qualified leads (CQLs)

EXECUTIVE METRIC

Pipeline influenced by a community touch

LIVES IN

Community analytics, CRM campaigns

↗️ Retention and expansion

LEADING INDICATOR

Members activated inside customer accounts

CHANNEL KPI

Retention delta, community-active vs not; expansion signals flagged

EXECUTIVE METRIC

Net revenue retention of community-active accounts

LIVES IN

Community analytics joined to CRM accounts

⚡ Efficiency

LEADING INDICATOR

Self-serve answer rate

CHANNEL KPI

Ticket deflection, content reuse

EXECUTIVE METRIC

Support cost per account

LIVES IN

Help desk, community analytics

Return on community spend shows up in two layers

Report the direct layer monthly and the compounding layer quarterly.

DIRECT RETURNS

Pipeline, retention, expansion.

COMPOUNDING RETURNS

Cheaper acquisition, content creation and reuse, owned audience growth, search and AI visibility.

THE DIFFERENCE

Attach your CRM. Attribute the pipeline.

Bettermode syncs member activity to Salesforce and HubSpot as native records: members, posts, replies, and event RSVPs land on the contact and account within seconds. Once activity lives on the record, attribution works the way your campaigns already do.

crm.example.com/contacts/jordan-reyes

SAMPLE DATA



Jordan Reyes
RevOps Lead · Northwind · Customer since 2025

Account: Northwind

Open opportunities: 2

COMMUNITY MEMBER

Member since **Mar 2026**

Last active **2 days ago**

Posts **14**

Best replies **3**

Events attended **3**

Community activity

synced automatically

Asked "How do we roll this out to two more teams?"

2d ago

Best reply selected on SSO group mapping

6d ago

RSVP'd Product roadmap AMA

1w ago

Replied in Getting started for admins

2w ago

Open pipeline this quarter

by community touch

With a community touch

\$412k

No community touch

\$698k

 Native records, not CSV exports.

 Reps see community context on the account.

 Report pipeline influence like any campaign.

CRM sync availability varies by plan and integration. Product views are illustrative and use sample data.

WORKSHEET

Your 90-day community scorecard

One page to run the quarter. Two use cases, three KPIs, one owner.

Use case one		Use case two	
KPI	Where it's measured	Baseline	90-day target
Owner	Review date		
The sentence you'll say to your exec: "Community drives [executive metric] through [use case]"			

Consistency reads as strategy

A relevant number every month does more for community's standing than a perfect deck once a year.

NEXT STEP

Put these signals where your teams already work.

[Explore Bettermode](#)