



01 / DEFINE

02 / PREPARE

03 / INVITE

04 / REVIEW



DAYS 1-15 / DEFINE THE PILOT

# Start with a useful purpose.

Choose one customer problem, a first group, and the time your team can commit.

COMMUNITY / COMPANY

OWNER

PILOT START DATE

- ☐ **Choose one problem to solve.**  
Use support questions, onboarding conversations, or customer interviews to find a need that members could help each other with.
- ☐ **Define the first customer group.**  
Record the roles and accounts you will invite, and why the proposed space would be useful to them.
- ☐ **Agree who owns the work.**  
Name the owner, protect weekly hours, and confirm contributions from support and product, including cover for absence.
- ☐ **Write down the pilot limits.**  
Set the budget, primary outcome, participation expectations for this cohort, and dates for reviewing the evidence.
- ☐ **Set the support boundary.**  
Decide which questions belong here and which need private support. Identify who handles urgent issues and escalation.
- ☐ **Check participation and privacy.**  
Confirm customer posting policies and access needs. If another community already exists, explain how the two will work together.

## READY TO PREPARE

The owner, customer group, problem, hours, and support boundary are agreed. Adjust the schedule if an essential decision is still open.



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DAYS 16-30 / PREPARE AND TEST

# Make the first visit worthwhile.

Set up a small, useful space and test the journey before sending invitations.

PHASE OWNER

READY-TO-INVITE REVIEW DATE

- ☐ **Choose public and private spaces.**  
Base access on member needs and the information they will share. There is no required public-to-private content ratio.
- ☐ **Check the platform essentials.**  
Test sign-in, permissions, notifications, required integrations, and content export. Check public pages without a login if search matters.
- ☐ **Prepare answers to real questions.**  
Rewrite source material for the audience. Remove sensitive details, get permission for customer examples, and show team authorship.
- ☐ **Connect the existing help.**  
Link to documentation where it already answers the question. Add the examples or discussion that help customers apply it.
- ☐ **Set expectations and entry points.**  
Agree response targets, working hours, and cover. Add clear links from onboarding, relevant help content, and the product.
- ☐ **Test the whole customer journey.**  
Have someone outside the project join, search, post, receive a reply, and move an issue into private support. Verify guest access too.

## READY TO INVITE

An intended member can find help and ask a question. The team knows who will respond, and the private-support route works.



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DAYS 31-60 / INVITE, LISTEN, IMPROVE

# Learn with a small first group.

Invite people you can support personally, then improve the experience together.

FIRST INVITATION DATE

PLANNED COHORT SIZE

WEEKLY REVIEW DAY

- ☐ **Choose a manageable first cohort.**

Five to ten people is one possible starting size. Choose the number around your customer relationships and available support time.
- ☐ **Make a personal invitation.**

Use an existing account contact where possible. Explain why you thought of them, what they can try, and how to get help.
- ☐ **Help each person do something useful.**

Guide them to an answer, a relevant discussion, or a question they can ask. Check where sign-in or onboarding gets awkward.
- ☐ **Ask what helped and what did not.**

Talk with participants, including readers who did not post. Make useful changes and tell them what their feedback changed.
- ☐ **Review workload and handoffs weekly.**

Check unanswered questions, response times, and actual hours from everyone involved. Follow up on bugs and product requests.
- ☐ **Invite the next group when ready.**

Widen the invitation when members are getting help and the team has capacity. Keep personal support where it adds value.

### READY TO REVIEW

Keep a record of what members found useful, what you changed, and what the work cost in hours. Member counts alone will not explain the result.



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DAYS 61-90 / REVIEW AND DECIDE

# Choose the next step together.

Use the criteria you agreed at the start, alongside what the pilot actually taught you.

- ☐ **Review member value and participation.**  
Look for useful exchanges and returning readers or contributors. Count people separately from customer accounts; note reminders.
- ☐ **Check answers and response coverage.**  
Review unanswered questions and useful answers. Separate time to first reply from time to a useful answer; state the hours used.
- ☐ **Compare the effort with the plan.**  
Include owner time, colleague contributions, moderation, and after-hours work. Identify what the team can sustain next quarter.
- ☐ **Review public discovery only if relevant.**  
Track indexed pages, impressions, and clicks separately. Page views are not avoided tickets, and retention gaps do not prove causation.

## RECORD THE DECISION

### Expand

Help another similar cohort.

### Extend

Name the evidence still needed.

### Narrow

Focus on the useful part.

### Pause / stop

Preserve help and explain the change.

## REASON / EVIDENCE FOR THIS DECISION

## NEXT ACTION AND OWNER

## NEXT REVIEW DATE

## Plan your launch with Kaustubh.

Kaustubh Katdare, founder of Jatra  
20 years of community-building experience.  
[cal.com/kaustubh-katdare/30min](https://cal.com/kaustubh-katdare/30min)

[Book a 30-minute call](#)