

8 STEPS TO ENSURE COMMUNITY ENGAGEMENT SUCCESS

From managing stakeholders to making sense of complex feedback it's easy for important steps to get missed, especially when you're juggling tight timeframes and limited resources. This cheat sheet breaks the process into eight practical steps to help you stay on track, ask the right questions, and deliver meaningful outcomes that communities can see.



01 DESIGN

Clarify your purpose, scope, and stakeholders

Starting with a clear purpose ensures your engagement is focused, aligned with decision-making processes, and inclusive of the people who matter most. Set yourself up for success by confirming you've:

- ✓ Defined a clear purpose for the engagement
- ✓ Established goals and what success looks like
- ✓ Identified key stakeholders and community groups
- ✓ Integrated engagement throughout the project cycle
- ✓ Confirmed internal support, timeframes, and resources
- ✓ Selected methods aligned with purpose and participants



03 COMMUNICATE

Keep people informed, involved, and connected

Well-timed, targeted communication helps build trust, improve participation, and close the loop.

Whether you're promoting a consultation or reporting back, communication plays a vital role throughout the engagement. Ensure your engagement plan has:

- ✓ Decided when and how to keep people informed
- ✓ Tailored communication to suit stakeholder needs
- ✓ Sent key messages, announcements, reminders, updates
- ✓ Tracked email performance (open rate & responses)
- ✓ Maintained visibility via publishing key messages to web
- ✓ Ensured privacy, subscription management and opt-outs

02

IDENTIFY & PREPARE STAKEHOLDERS



Know and reach who you're engaging

Understanding your stakeholders from the start helps ensure your engagement is targeted, inclusive, and meaningful. Ensure you've:

- ✓ Mapped stakeholders and community networks
- ✓ Organised categories to group stakeholders
- ✓ Tracked previous engagements from key stakeholders
- ✓ Gathered contact details for key community groups
- ✓ Updated your stakeholder CRM with contact history
- ✓ Checked internal team can access up-to-date information

04

GATHER COMMUNITY INPUT



Make it easy for people to have their say

A strong collection process meets people where they are and brings all input, no matter the format, into one place for analysis. Confirm you've:

- ✓ Offered multiple ways for people to provide input
- ✓ Designed a clear, accessible, branded survey
- ✓ Captured insights via email, post, phone or events
- ✓ Supported people to participate in their own way
- ✓ Brought all collected input into one central project space
- ✓ Ensured all data was searchable and ready for reporting



05 INTERPRET PERSPECTIVES

Understand what's been said

Now that the feedback is in, it's time to make sense of what people actually said. Analysing qualitative data helps surface what matters most, in people's own words. Check that you've:

- ✓ Organised the raw data
- ✓ Skimmed the data to get a feel for tone, issues & trends
- ✓ Applied structure to the text using tags or codes
- ✓ Grouped themes together to tell your data story
- ✓ Used tools to cross-check your findings (NLP, LLMs)
- ✓ Documented insights in a format prepared for sharing



07 REPORT BACK

Share what you heard, and what happens next

Transparency matters. Reporting back helps close the loop and shows people their input made a difference. Whether through summaries, visuals, or full consultation hubs, this step makes your engagement visible. Make sure you've:

- ✓ Shared findings in accessible formats
- ✓ Clearly connected feedback to decisions and next steps
- ✓ Created a central place for access to project materials
- ✓ Used visuals to bring results to life
- ✓ Published submissions (where appropriate & permitted)
- ✓ Collaborated with your team to review, approve, and publish content securely
- ✓ Maintained brand consistency and accessibility across all published materials

06 EXPLORE PATTERNS



Uncover the data story hidden in your numbers

Your quantitative data helps you understand who participated, what they said, and how responses differ across groups. It's where the numbers start to tell their own story. To support strong insights, your process should have:

- ✓ Reviewed overall responses and checked for drop-offs
- ✓ Checked for demographic spread (age, location etc)
- ✓ Filtered to display under-represented voices
- ✓ Displayed key results in a range of data visualisations
- ✓ Compared responses by group to highlight themes
- ✓ Applied sentiment analysis to understand overall tone
- ✓ Prepared visuals to share internally and externally

08 REFLECT



Learn what worked, and carry it forward

Good engagement practice builds over time. With all your data, communications, and insights stored in one place you can look back on what made an impact and strengthen organisational knowledge. Think about whether you:

- ✓ Reviewed and assessed whether project goals were met
- ✓ Looked back at themes to identify what resonated most
- ✓ Reviewed communication performance
- ✓ Identified questions with high drop-off to improve design
- ✓ Connected this project to others in your workspace to build cross-project learning

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Converlens helps you manage every step. From collecting feedback to making sense of it, sharing results, and building long-term engagement capability.

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