

An Exploratory Study on the Role of Social CRM for Building Communities of Practice

Cristina Alejandra Barahona Cabrera
0009-0000-7791-2276
Social CRM Research Center e.v.
Grimmaische Straße 12
04109 Leipzig Sachsen
Email: cristina.barahona@scrc-leipzig.de

Olaf Reinhold
0000-0003-1977-1641
Duale Hochschule Sachsen
Rittergutsstraße 6
01591 Riesa Sachsen
Email: Olaf.reinhold@dhsn.de

Abstract—Communities of practice (CoPs) promote knowledge exchange, learning, and collaboration among actors from a common practice. In these communities, digital tools are used for communication, engagement monitoring, knowledge creation and management. This article examines the potential of Social CRM to support the development and implementation of CoPs. The study combines a literature review, qualitative document analysis, action research in a European Union project, and a TAM applicability evaluation. The literature review differentiates three implementation scenarios: in-person, virtual, and hybrid CoPs. The document analysis matches the Communities of Practice Playbook with an integrated Social CRM model to derive possible application fields for CoPs, which are then applied to a real-world scenario. Key results include Social CRM application fields and their added value for CoP implementation.

Index Terms—Communities of Practice, Social CRM, digital platforms.

I. INTRODUCTION

COMMUNITIES of practice (CoPs) encourage knowledge exchange, learning, and innovation by connecting individuals who share a practice and interact around common problems. In virtual and hybrid forms, CoPs create online spaces where members can learn, interact, and collaborate regardless of their location [1]. Knowledge generation and transfer are more likely when communities combine content, conversation, connections, context, and purpose [2]. In this sense, social platforms promote the transformation from centralized knowledge management to dynamic online information conversations [3].

Social customer relationship management (Social CRM) is relevant for CoPs because it combines platform, interaction, analysis, CRM, and management functions [4] that can uphold communication, stakeholder administration, knowledge organization, participation, and engagement monitoring. However, research on how Social CRM can be applied for the development and management of CoPs is scarce. In this article, the authors investigate and show that Social CRM can be used for the development and implementation of CoPs. The guiding research questions were:

- What implementation scenarios of CoPs can be identified in the literature, and what digital tools are used to support them?
- What practical applications of Social CRM can be derived for the development and management of CoPs?
- How can these applications be implemented in a real application scenario?

The paper is organized into six sections: an introduction (I), the theoretical foundations relevant to the investigation (II), the methods utilized (III), a description of the results (IV), the discussion of results (V), and conclusion (VI). In the Appendix, the questionnaire and open-ended questions are available, followed by acknowledgements and bibliography.

II. THEORETICAL BACKGROUND

A. Virtual Communities of Practice

A CoP can be defined as a self-organizing group of individuals with interest in a shared domain. Through ongoing interaction, members exchange practical expertise, develop common knowledge and solve problems collectively [5]. Learning and knowledge sharing encourages the development of individual competencies and facilitates learnings sharing across the organisation. Innovation occurs by modifying and improving work practice, generating ideas and finding common solutions to shared challenges [6].

Frameworks for implementing communities of practice commonly draw on Wenger's work [7], a process involving the definition of the reason of existence of the CoP, creating organizational support, developing the community, encouraging interaction, and implementing activities to create value and measure it. Another relevant framework is Probst and Borzillo's [8] commandments of CoP governance, including defining clear objectives, designating clear responsibilities, provide regular expertise, promote access to external networks, measure the success and illustrate it to the members.

These frameworks are also reflected in practical guidelines, such as the Communities of Practice Playbook [9] of the European Union that describes the lifecycle of CoPs in

eight success facets: vision, governance, leadership, convening, collaboration and cooperation, community management, user experience, and measurement. The vision defines the community's purpose and objectives. Governance designates stakeholder responsibilities, expected contributions, user groups, and the operational model. Leadership establishes roles within the community and identifies the core group responsible for driving its activities. The convening model then describes how conversation, connection, communication, and activities outside of the community are organised. Finally, collaboration and cooperation processes should be established and supported by continuous measurement of participation and engagement [9].

CoPs can vary on their degree of reliance on Information and Communication Technology (ICT), ranging from communities that meet mainly in-person (low reliance level), to communities that combine ICT with in-person meetings (middle reliance) to CoPs that predominantly use ICT to interact [10]. Based on this distinction, this article considers three implementation scenarios: in-person (P), where the reliance on ICT is minimal, and their practice exchange occurs during presential meetings, hybrid or tool-supported Communities of Practice (H) with a middle reliance on ICT, and virtual Communities of Practice (V), when its members use a common online platform as their primary method to communicate, collaborate, and engage with one another.

B. Social CRM

Instead of viewing customer relationship management as a standalone internal system, social customer relationship management combines organizations' objectives, strategy, processes and information with social media technologies to increase customer value [11]. Social CRM is a business strategy that positions clients as active collaborators in value creation for all involved [12].

Five task areas of Social CRM can be defined: platform, analysis, interaction, customer relationship management (CRM), and management. Platform concerns the digital spaces and channels for information distribution and interaction. Analysis refers to data extraction from the platform and interpretation. Management covers moderation, data administration, privacy, and integration between systems and workflows. CRM connects social media information with relationship management processes. In Interaction, techniques for proactive and reactive communication with users are included e.g. content delivery, recommendations, and alerts [11].

In this article Social CRM is examined from the perspective of stakeholder relationship management and community building capacities, rather than sales orientation.

III. METHODOLOGY

A narrative review, [13] performed on May 2026, was used to explore what implementation scenarios of CoP can be found in the literature, and what digital tools were used

for its implementation. *Google Scholar* was searched for the terms "community of practice" OR "communities of practice" OR "virtual communit* of practice" OR "online communit* of practice".

The inclusion criteria were that the publication was (i) focused on communities of practice or virtual communities of practice, (ii) implementation, design, evaluation of a CoP was a central topic, (iii) the publication date was after 2010.

In the case of similar titles, the authors, year of publication and DOI were compared to identify and remove duplicates.

The abstracts of the remaining publications were then read by the researchers to determine if the implementation of a CoP was addressed as a central topic. Publications were excluded when they discussed general or characteristics of CoPs but did not describe a specific implementation case. Following abstract screening, twenty-seven publications were retained for full text review. At the end of this last step, twenty articles met the inclusion criteria and were added in the literature analysis. Then, a qualitative document analysis was conducted on The Communities of Practice Playbook [9] and Reinhold's Social CRM model [11]. As a result of the analysis, practical applications of Social CRM for CoP were derived.

Action research was necessary for the second part of the methodology; this approach is especially useful when a broad knowledge of the context and process of the studied phenomena are required to answer the research questions, involving the researcher as an active participant who introduces changes in the studied system[14]. The researchers are active part of the CSSBoost Project consortium; following an action research approach, they guided the design of the hybrid CoP, which constitutes the real-world scenario described in the article. This position allowed the researchers to have direct access to the project setting and its stakeholders; knowledge required to develop a questionnaire and interview guide responding to the actual CoP design process.

The proposed use of We.Network as the community platform and Smart.We as the CRM system was reviewed through a walkthrough with the pilot 5 lead, followed by a TAM [15] questionnaire, based on a five point Likert scale, to evaluate the perceived usefulness and ease of use of both. Perceived usefulness for knowledge exchange, thematic discussion, cross pilot interaction, stakeholder administration, invitation management, and engagement roadmap management was evaluated. Ease of use was centred on the invitation process, interaction through posts, reactions or messages, and navigation within the platforms. An interview was also done to explore barriers to use of the technical platforms, the expected added value of the CoP, onboarding needs, and the usefulness of the design process followed. The questionnaire and interview questions can be found in the appendix.

IV. RESULTS

A. Implementation of Communities of Practice

During the literature review, four aspects were found: mentions of how CoPs support learning and professional development, possible implementation scenarios, digital tools used to support them, and . In the following paragraphs more information is provided.

Bindels et al. [16] described communities as a social infrastructure for active learning. Similarly, Holden et al [17]. found that the community encouraged competence development through accessible and timely professional aid. Wilson et al.[18] found that CoPs help participants build relationships that can guide in their work.

Based on the implementation characteristics identified in the reviewed studies, and the classification described in section B of the theoretical background, the CoPs were grouped into three implementation scenarios: in-person (P), hybrid/tool-supported (H), and virtual (V). This categorization reflects the dominant mode through which each CoP was organized, and their reliance level upon ICT; Table I summarizes the articles associated with each scenario.

TABLE I.
COP IMPLEMENTATION SCENARIOS

CoP Implementation Type	Literature
In-person (P)	[16], [17], [18], [19], [20], [21]
Hybrid / tool supported (H)	[22], [23], [24], [25], [26]
Virtual (V)	[27], [28], [29], [30], [31], [32], [33], [34], [35]

In-person CoPs implementation is less dependent on technological infrastructure and more strongly grounded in meetings, dialogue, peer support, professional reflection, shared experience, and collaborative learning.

Hybrid implementation of communities of practice combined social interaction with structured online activities. Across the studies, approaches involved a combination of in person workshops and meetings, with online meetings or conferences [22] [23] [24] [25] [29] , interactive websites [22] [25], social media [22], discussion forums[23] [29], shared suggested resources and materials [29].

For virtual implementation of communities of practice, online forums, platforms or hubs, shared repositories, synchronous virtual meetings, asynchronous social media or listserv communication, dashboards and reporting tools, enterprise social platforms, and digital evaluation or reflection resources were used as tools to assist with geographically dispersed participation, asynchronous communication, resource sharing, and continuity between meetings for practice exchange.

Given the heterogeneity of digital tools employed across CoPs, a second level of analysis was conducted to identify the specific technological resources used in each study. Table II presents this synthesis by mapping each digital tool to

the studies in which it appeared and indicating whether the corresponding CoP was virtual or hybrid.

TABLE II.
DIGITAL TOOLS FOUND ACROSS CASES

Digital Tool / Type of CoP	Sources														
	[22]	[23]	[24]	[25]	[26]	[27]	[28]	[29]	[30]	[31]	[32]	[33]	[34]	[35]	
	H	H	H	H	H	V	V	V	V	V	V	V	V	V	
Online platform, website or hub	x	x				x		x	x				x	x	
Online meetings, virtual sessions or conference calls	x	x	x	x	x			x						x	
Discussion forums						x	x	x		x	x				
Social media (public)	x										x	x			
Emails and Listserv												x			
Shared resource repository/folder		x				x	x	x		x				x	
Concept mapping tool	x														
Dashboards and performance metrics		x					x								
Project management tools					x		x								
Reports and feedback tools		x					x								
Community scoreboard							x								
Enterprise social platform													x		
Online collaboration space	x			x					x						
Online survey													x		
User engagement tracking									x				x		

In the identified papers, virtual and hybrid CoPs employed digital tools to communicate, encourage participation, organize knowledge resources, and evaluate member engagement. These applications are related to the functions of Social CRM and explained in the next section.

Beyond the distinction between in-person, hybrid, and virtual implementation scenarios and ICT used, a common funding and governance model was noted on Communities of Practice. CoPs were commonly implemented as formally sponsored initiatives, rather than naturally emerging groups. In most studies, the community of practice was created, funded, coordinated, or backed by an organization, professional body, health system, research project, or institutional program, with only exceptional case where the community was codesigned by its members and the sponsoring organisation [35].

B. Communities of Practice and Social CRM

A qualitative document analysis was conducted on The Communities of Practice Playbook and Reinhold's Social CRM model (See Table III). The Playbook was examined to identify the facets involved in developing and sustaining communities of practice, whereas the Social CRM model [11] was analysed to identify Social CRM tasks and tools relevant to those facets.

TABLE III.
CoP & SOCIAL CRM

CoP Facet	Social CRM task Area	Relevant elements of Social CRM
Vision	<i>Platform</i>	Repositories
Governance	<i>CRM</i>	CRM System: Contact directory of community members, Formulars
Leadership	<i>Management CRM</i>	Responsibilities and permissions for CRM System functions, data administration and support
Convening	<i>Platform</i>	Multimedia Sharing, Blog, Social network, tagging, specialized repositories/wikis
	<i>Analysis</i>	Social Media Monitoring, Social Network Analysis, Social Search
	<i>Interaction</i>	Recommendation, Questions, Notifications, Online events and meetings
Collaboration /Cooperation	<i>CRM Interaction</i>	Online collaborative repository, Event Management, Project Management Tools
Community Management	<i>CRM</i>	CRM System (Campaign, Lead and Feedback Management)
	<i>Analysis And Interaction</i>	Social Media Monitoring, Social Network Analysis, Social Search, Social Media and Community Management tools
User Experience	<i>Analysis</i>	Social Media Monitoring, Social Network Analysis, Social Search
	<i>Interaction</i>	Feedback
Measurement	<i>Analysis</i>	Business Intelligence Tools

C. Real-World Scenario

The experimental scenario is situated in the CSSBoost project, funded by the European Union. CSSBoost connects in Circular Systemic Solutions (CSS) businesses, governments, universities, researchers, citizens and consumers, and implements them as regional pilots. The pilots address bus transportation in Portugal, water recovery in Italy, carbon neutral plastics in Germany, and agriculture and livestock in Greece. A fifth one identifies possible synergies and interoperability between pilots, to develop a virtual CSS and a shared knowledge base.

In pilot 5, a hybrid community of practice is being developed to support multi-regional cooperation and knowledge exchange across stakeholders. The design of the CoP follows the Communities of Practice Playbook and practical applications of Social CRM proposed in this study. The process is guided by the researchers, in collaboration with the partner organization leading pilot 5 during online working sessions in a collaborative whiteboard platform (Miro). The purpose of the CoP was defined as creating a space to exchange knowledge practices, technology developments, and regulatory frameworks among members of the CSS ecosystem. The core group responsible for administering and driving the community is composed of members of the consortium organizations.

Initial design activities focused on defining the community structure and identifying the stakeholders to be involved. Relevant stakeholders were mapped and categorized through an influence–interest matrix. The topics to be communicated to

the CoP were then defined, followed by the practice topics expected to be discussed by community members. These topics were matched with stakeholder groups according to where input was needed to enrich the shared practice and knowledge base. Internal and boundary-spanning convening activities were also defined to encourage interaction within the consortium and with external stakeholders.

The social platform We.Network and the CRM system Smart.We were selected as the Social CRM infrastructure to assist the hybrid implementation of the CoP. In We.Network, thematic channels were created to organize the topics to be discussed by the community. For example, in the Innovation Hub channel, the exchange of learnings from similar projects, new technologies developed by members, examples of technologies used to solve specific problems, and financing opportunities takes place. These channels are designed to structure practice exchange and contribute to the development of a common knowledge base across the integrated CSS; example snapshots of the channels can be found in the appendix.

The next implementation steps include validating the proposed channels with consortium members, collecting stakeholder contact data from the four CSS pilots through Smart.We formulars, and synchronizing these data into the CRM contact directory. Stakeholders will be invited to join the CSSBoost community in We.Network; their user rights will define which members can publish in specific spaces, create channels, react to content, and create groups.

A community engagement roadmap is under development; once finished, it will be synchronized as a campaign in Smart.We. Once the stakeholders join the We.Network channels, administrators will introduce discussion prompts in the channels. These activities may be managed directly through We.Network or through Smart.We campaign functions. The analysis functions to be used are still under discussion (e.g. Social Media Monitoring, Social Network Analysis, and Social Search); their intended purpose will be to aid the moderator in the identification of relevant topics for the community that can be used for new posts, dissemination campaigns and online and in person activities as the CoP develops.

D. Evaluation of Applicability through TAM Survey

The TAM survey response indicates an overall positive perception of ease of use and usefulness of We.Network and Smart.We from the responder. The CRM system is considered relevant for stakeholder directory administration, and management, of the engagement roadmap. The social platform We.Network is also evaluated positively for knowledge exchange and thematic organization.

Regarding ease of use, the interaction through posts, reactions, and messages in We.Network is marked as intuitive. However, navigation could be challenging, as users could encounter difficulties to know where to publish information, find relevant channels, events, and resources. Thus, during the interview it was highlighted that a basic guide explaining what can be done in the platform for users and moderators and where would be necessary.

Another important remark from the interview was that a relevant barrier for the adoption of the social platform is the existing competition, such as Microsoft Teams and LinkedIn which are already part of the stakeholder workflows. The pilot lead indicated that We.Network would need to offer clear added value or interoperability with existing tools. In this context, added value is understood as an active community where the core team encourages information sharing, meetings, clear participation options, and interaction between participants.

When the platform is perceived as useful and attractive, the incentives to take part in the community increase, even after the project end. Usefulness depends on the perceived benefit for stakeholders of maintaining contact and interaction with actors from different supply chains and countries.

In summary, the evaluation indicates perceived usefulness and ease of use of the Social CRM tools in the hybrid CoP of CSSBoost. It also suggests that successful implementation will depend on user onboarding, moderator preparation, active facilitation, and a visible value proposition for stakeholders. Social CRM can support the CoP infrastructure, but community interaction still needs to be intentionally encouraged and maintained.

V. DISCUSSION

A. Learnings on the Application Fields of Social CRM in CoPs

For learning and professional development to occur in CoPs, interaction, peer support, and relationship building must take place. These collaborative exchanges between stakeholders are similar to the value creation logic of Social CRM, where relationships are built for mutual benefit. For this reason, Social CRM is applicable to CoPs in areas such as stakeholder administration, facilitation, knowledge organization, engagement analysis, and community evaluation. The added value created for the users is an active community where relevant information, contacts, and learnings are available for their work. These benefits can motivate stakeholders to remain involved in the community. In the following paragraphs, possible application fields of Social CRM are discussed in more detail.

A first application of social CRM is stakeholder administration. During the governance facet, a list of actors to be involved in the CoP is created; this information can be stored in a contact directory in the CRM system, including member names, affiliations, contact details, roles, committee membership, and expertise. This information can be entered manually or collected and synchronized through forms sent to stakeholders. Vision and governance documents, such as terms of reference, decision making principles, participation guidelines, codes of conduct, and internal policies, can be stored in the shared repository space of the platform.

As for the structure defined for leadership, it will be reflected on the differentiated CRM functions available for members of the core group. These may include data administration, updating calendars and directories, sending surveys,

reviewing engagement metrics, or programming publication of content in the social platform.

Virtual and hybrid implementation of CoP requires bringing members together, creating connections, distributing information, sustaining interaction between meetings, and fostering collaboration. A social platform, whether public or closed, provides a space for members to communicate, discuss, access resources, and contribute knowledge through posts in general, topic and group channels, reactions, direct messaging, multimedia sharing, blogs, online collaborative repositories, and wikis. Complementary, Social CRM can be used by the core group for event management to organize online and in person meetings and workshops, sending invitations to mailing lists, or as direct messages on the connected social platform.

This social platform is closely related to community management and analysis, parts of the Social CRM tools and a facet of the CoP implementation. The moderator can identify what members are discussing, which topics generate interest, and how members react to shared content using social media monitoring, social listening, social search, sentiment analysis, and topic detection. These insights can be used to build discussion prompts, create new content, dissemination campaigns, and future activities. Social network analysis presents the opportunity to discover how members are connected, what new connections could be suggested, and the identification of potential new members. CRM can be then used to automatize the publications in the social platform according to the engagement roadmap.

Finally, business intelligence can support the ongoing evaluation of the virtual performance of the CoP. It can be used to determine the levels of participation of the members, mentions keywords, likes, timing, sentiment analysis, social network analysis and mapping.

Overall, social CRM can be considered as assistance in the virtual and hybrid implementation of communities of practice. Social CRM software platforms are typically customizable and, therefore, adaptable to different use cases. Its value lies in helping the core group administer members, coordinate activities, sustain participation, organize knowledge, identify emerging needs, and evaluate community development. This is especially relevant since CoPs are formally sponsored or created by organizations rather than emerging spontaneously. Even when a CoP does not follow the Playbook directly, these applications can be adapted to other implementation frameworks.

B. Design and Implementation of a CoP

Designing a hybrid community of practice that provides enough incentives for participants to join and remain active is not without difficulties. In the CSSBoost case, the authors worked closely with the pilot 5 lead to guide the conception and design of the CoP, as part of the action research approach.

This guiding role was important to move from the general objectives of the community to a functioning structure, including definition of stakeholder groups, communication spaces, topics, and forms of participation. The establishment

of the convening model was a crucial step, because it clarified what should be communicated, to whom, and through which channels.

As highlighted in the interview, motivating members to join an additional social platform poses a challenge for implementers, especially when stakeholders already used established platforms for communication and networking. In the case of CSSBoost, steps taken to address this challenge include highlighting the benefits of a private social platform and increasing its connections to the tools of the Regional Information Sharing Platform, promoting it as part of the digital infrastructure supporting the project.

The CSSBoost case exemplifies the early-stage design and first steps towards the implementation of a hybrid CoP. As the project and research process continue, so will further documentation on the development of the community and how Social CRM functions support it.

VI. CONCLUSION

In this study, an initial exploratory assessment of how Social CRM could support virtual and hybrid CoPs is provided. The narrative review and the document analysis allowed the identification of implementation scenarios, digital tools, and practical applications. As for the real-world scenario, it was evaluated with one TAM questionnaire and interview.

The contributions include connecting CoP implementation literature with Social CRM functions and proposing how Social CRM may be used beyond its sales functionalities in a real case scenario, suggesting how a social platform and a CRM system may support stakeholder mapping, thematic channels, governance, invitations, engagement planning, and future moderation activities.

From a practical perspective, hybrid CoPs are dependent on both social facilitation and digital support. Social CRM can provide spaces for collaboration, knowledge exchange, and communication, but involvement of stakeholders will depend on the incentives to participate in the community provided by the core group.

As for limitations, the study is exploratory and preliminary in nature, with an evaluation of applicability based on a small dataset, and a real real-world scenario of the application of Social CRM in a hybrid CoP is in its first stages. Future research could expand the empirical validation, once the CoP is more mature on its implementation, including more members of the community and additional constructs as part of the TAM. Additionally, the literature review could be extended to additional databases and additional CoP or CRM frameworks. Future opportunities include presenting and evaluating the proposed Social CRM applications in other project consortia and organizations interested in developing virtual or hybrid communities of practice.

APPENDIX

TAM questionnaire and open-ended questions.

Please read each statement carefully and indicate the extent to which you agree or disagree with it. (1 = Strongly disagree, 2 = Disagree, 3 = Neither agree nor disagree, 4 = Agree, 5 = Strongly agree)

Perceived usefulness

- We.Network would help members exchange knowledge, practices, technologies, and regulatory information.
- The thematic and communication channels in We.Network would help organize discussions around relevant CSS topics.
- We.Network would support interaction between members from different CSSBoost pilots.
- The contact directory in Smart.We would be useful for managing stakeholder and member information across the CSSBoost pilots (organizing members, roles, affiliations, and stakeholder groups).
- Smart.We would support the process of inviting stakeholders to join the CoP.
- The apps offered in Smart.We would help manage the engagement roadmap.

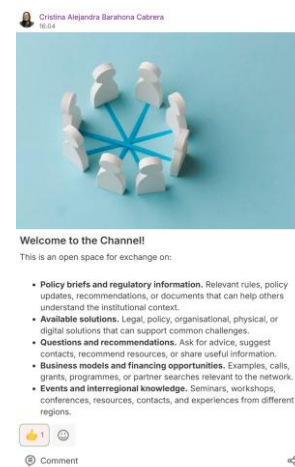
Perceived Ease of Use

- The process to invite users to join the We.Network community is intuitive
- It would be easy to interact with other members through posts, reactions, or messages in We.Network
- It would be easy for users to know where to post information, find relevant channels, events, and resources in We.Network.

Open ended questions

- What barriers could prevent key actors from using these platforms regularly?
- What do you consider to be the main added value that the CSSBoost Community of Practice should provide?
- What initial support, training, or guidance would be needed before launching the CoP?
- Which parts of the design process have been the most useful structuring the Community of Practice?

Images from CSSBoost Social Platform Channels





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