



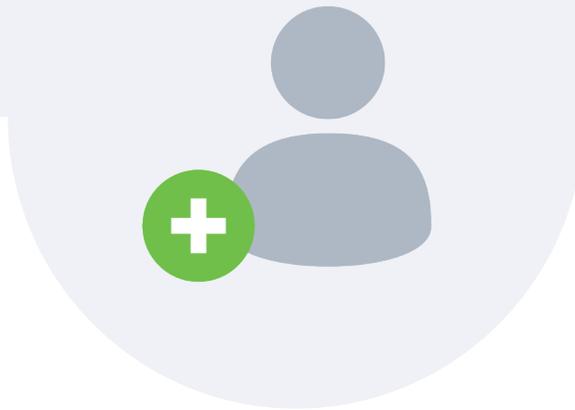
7 MUSTS

for

New Member Onboarding

You likely spend A LOT of time trying to grow your organization's membership.

And hey, let's face it, recruiting new members is NOT easy. So when you do get a new member, you, of course, want them to stay. And that's where having an organized and well-thought-out new member onboarding process comes into play.



The better you onboard — and the more comfortable you make your new members feel — the more likely they are to get involved in your organization, and thus, stay!

So what exactly should you be doing when it comes to new member onboarding? Read on for seven MUSTS.

1

Send a new member welcome packet...STAT

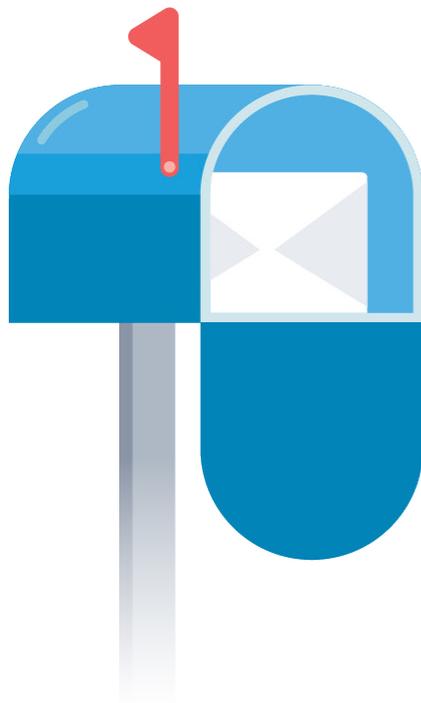
As soon as a member joins your organization, it's crucial that you reach out and welcome them. Because time is of the essence here, email is really the best channel to use.

That said, once you've sent out a new member welcome email, you'll also want to send out a new member welcome packet, which you can either send via email or regular mail depending on what your members respond better to. (Every organization is different.)

What should go in your new member welcome packet? Well think of it as a launchpad for your new members to reach success. What information do they need? What do you want them to know about your organization? A few resources we recommend including are...

- **A list of membership benefits**, such as perks, discounts, and offers
- **A calendar** of upcoming meetings and events
- **A quick reference sheet** with contact information and a "who's who" for questions your new members may have

And if you *do* go the traditional mail route, fun little swag items, such as stickers or magnets, are ALWAYS appreciated!



2

Keep the communications flowing

Too often, associations send a new member welcome email and/or packet...and then that's it. They kind of drop off the radar and leave it up to their new members to get involved (which often, doesn't actually happen).

To boost engagement from the start (and build the *habit* of engagement), it's important to have a schedule of communications lined up. You can't assume that just because you tell your new members something once, they'll remember it. The second (or third) time's the charm.

To make sure these communications actually happen (especially given how busy you are), we recommend setting up an automated email marketing campaign targeting your new members exclusively. (Note: With something like an association management system in place, this type of campaign is extremely easy to set up.) Email topics could include upcoming event reminders, benefit reminders, volunteer opportunities, special discount codes, etc. (Remember, the earlier you can engage these members, the better!)

3

Send targeted communications

It's no secret (or surprise) that the more targeted your communications are, the more likely recipients are to engage with your messages. That said, in addition to the automated emails mentioned above, consider sending more targeted emails based on your new members' varying interests.

For example, when your new members applied to become members of your organization, were they given the option to select special interests? If so, consider sending them content right off the bat about those special interests — a blog post on that topic, an upcoming webinar surrounding that subject, etc. This is a great way to showcase your association's value, and increased value equals increased retention.

Organize new members-only events

Events are a great way to engage all of your members, but they're especially great for engaging your new members. As you can imagine, though, events can be intimidating for new members (they don't know anyone yet!), so consider organizing a few new members-only events, if you can.

Now, if budget is an issue (you simply don't have any extra money to plan additional events), consider integrating new members-only segments into your existing event schedule. For example, at your annual meeting, consider organizing an hour-long networking reception for your new members. You could even incorporate a game, such as new member Bingo, to help kick-start conversation. (To get a Bingo box checked, members have to find other members who meet certain criteria — have a certain accreditation, have been out of the country, have met a celebrity, etc. Have fun with it!)

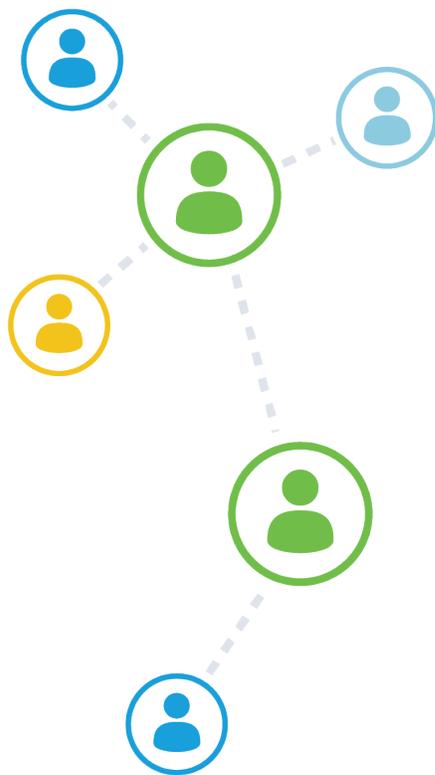
This is a fairly low-budget way to get new members engaged, and more importantly, *comfortable* with your association.



5

Pair them with a mentor

Another great way to not only get your new members engaged, but also provide them with value is to pair them with a mentor within your organization. Now this works better for some associations than it does with others, so evaluate your membership accordingly. But if a new member mentoring program *does* make sense and *is* possible for your association, consider setting that up.



Now we often hear from associations that mentoring programs don't work as well as they're intended, simply because the mentor and mentee don't interact as much as they probably should. If that's the case with your association, here are a few recommendations:

- **Don't assign every new member a mentor.**

If you have an online social community (or some kind of members-only forum), consider setting up a channel where interested parties (both on the mentor and mentee side) can go. That way, you're helping to facilitate the process, but you're not solely responsible for it.

- **Organize short-term mentoring opportunities.**

If long-term mentor/mentee relationships don't usually last (people get busy, etc.), consider creating opportunities that require less of a time commitment. (For example, consider pairing your new members — those interested, that is — with a mentor at one particular event, such as your annual meeting.) By reducing the time commitment needed to fulfill this role, you'll likely see interest in participation rise.

6 Host a new member orientation webinar

Sending your new members a welcome packet full of information about your organization is great (and necessary!)... but sometimes, they just don't read it. (Or, not all of it, at least.) To really get that information across, you may want to host a new member orientation webinar. You could host these quarterly or once every few months to ensure all new members have an opportunity to attend, regardless of when they joined.

Now these webinars don't have to be long and you can cover the same information that's in your new member welcome packet. But the benefit of doing it in a webinar format is that you're bringing your new members together, getting them to actively engage with your organization, *and* giving them an opportunity to ask questions — all crucial for onboarding success.

7 Ask for feedback

Last but not least, it's imperative that you ask your new members for feedback, ideally around the six-month mark of their membership. Why this particular timeframe? Well, it gives your new members enough time to get involved with your organization, but if there is something they're not really "digging" or taking advantage of, it gives your association the opportunity to make adjustments before the question of renewal is put back on the table.

To make sure you're gathering the right type of feedback, consider asking the following questions:

- What meetings or events have you attended since joining organization XYZ?
- What do you like the most — so far — about being a member of organization XYZ?
- What do you like the least?
- How often do you login to your member portal?
- How likely are you to renew your membership in the following year?

Having a solid new member onboarding process directly ties into membership retention. Again, the better you onboard, the higher your renewal rates are likely to be!

Even after a member is fully onboarded, however, there are still several steps you should be taking to help boost the likelihood of renewal.

For a full breakdown of what those steps are — and when exactly you should be taking them — check out our free **Membership Retention Kit!**



Click here to check it out!

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