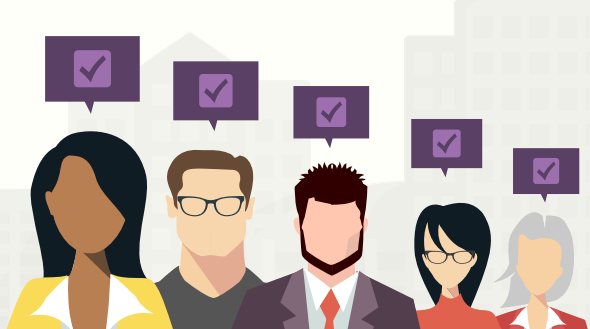




NEW MEMBER ONBOARDING

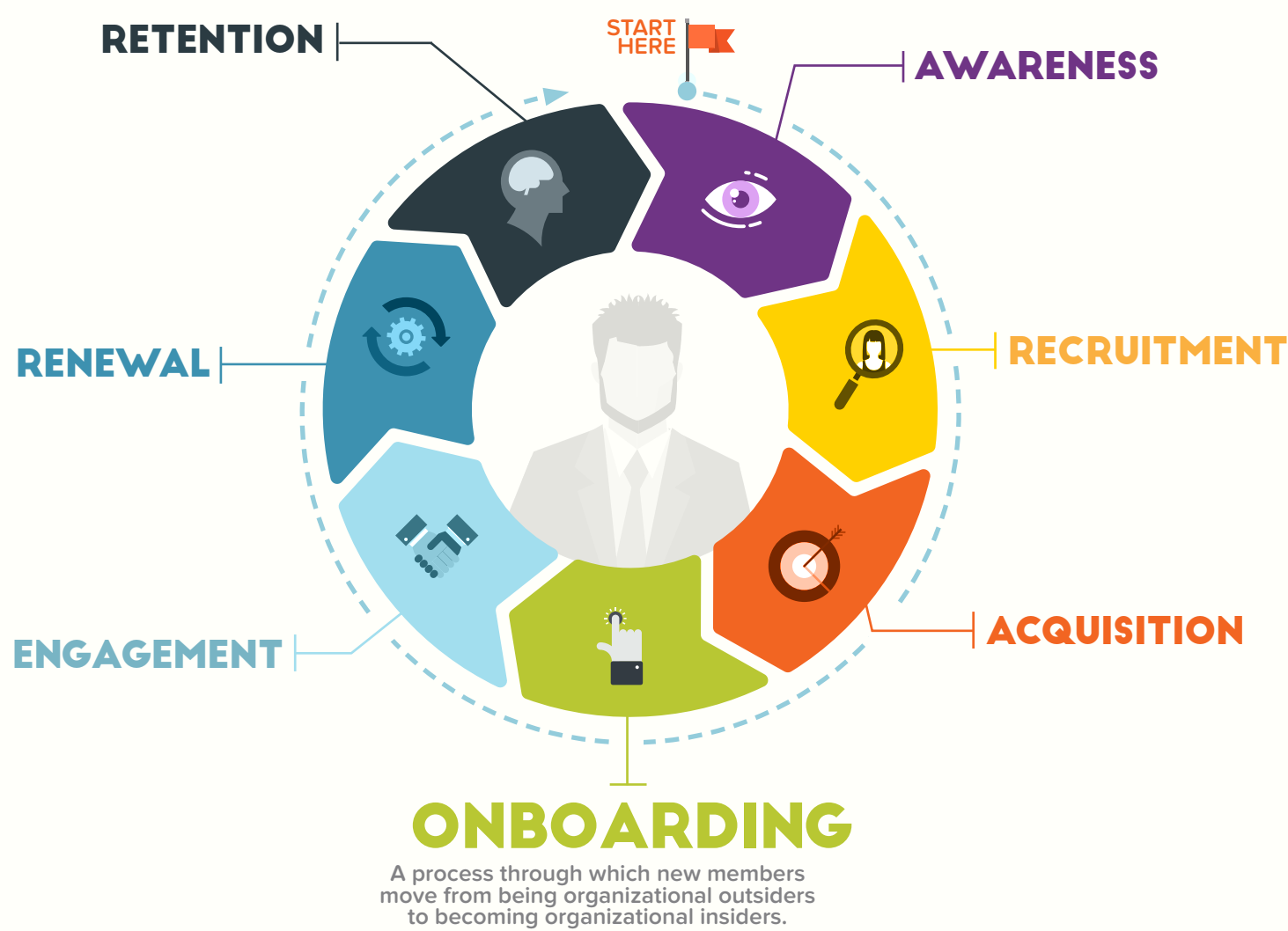
WHY NEW MEMBER ONBOARDING
MAKES A DIFFERENCE.

IT COSTS **7x**
MORE
TO OBTAIN VS
RETAIN MEMBERS!

New member onboarding is critical to retention. Statistics show that it costs 7x more to obtain a new member than to retain a current one and that first-year members have the lowest renewal rates.

Onboarding is more than simply sending out a welcome packet and adding them to your Association's email list – it's an ongoing process that relies on deliberate communication and engagement.

THE MEMBERSHIP LIFE CYCLE



WHY NEW MEMBER ONBOARDING IS CRUCIAL FOR ASSOCIATIONS



IMPACT

They're new, motivated, and excited



ATTENTION

You have their attention and one chance to set the tone



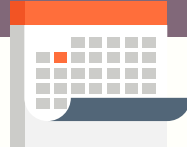
RETENTION

First-year members have worst renewal rates

THE ONBOARDING & TOUCHPOINT SCHEDULE

Onboarding is a process that is worth investing in. Use this timeline as a guideline to help new members become engaged with your organization and build a membership meant to last.

Member onboarding involves more than a checklist. A touch plan to improve onboarding and engagement builds a strong foundation for long-term membership.



Customize this plan for your organization and remember that even a simple plan is better than no plan at all.

DAY 1-7

- ✓ Email instructions on how to access member benefits.
- ✓ Call with an event invitation.

- ✓ Send welcome email.
- ✓ Mail new member packet.
- ✓ Call the member to say "Welcome to the Association."

DAY 14-21

DAY 45

- ✓ Analyze how they are using their membership.
- ✓ Email a piece of useful content, an article, or a link to a popular page on your Association's website.

- ✓ Make a check-in call / "Hello, how are things going?"
- ✓ Email a reminder of features available to members.

4 MONTHS

- ✓ Send membership check-in/survey.
- ✓ Email reminder of online community.

- ✓ Enter member into your Association's marketing funnel.
- ✓ Call with information about committees and events.

6 MONTHS

8 MONTHS

- ✓ Contact with volunteer opportunities.
- ✓ Extend a personal invite to event.

10 MONTHS

- ✓ Make a pre-renewal phone call.

11 MONTHS

- ✓ Mail a membership-benefit reminder statement.

12 MONTHS

- ✓ Send auto-renew notice.
- ✓ Send annual member survey.

THE ONBOARDING CYCLE SHOULD
CONTINUE FOR YEAR 1, YEAR 2,
AND YEAR 3+ MEMBERS.



EXCEEDING MEMBER EXPECTATIONS

- ✓ Be a person, not just an organization, to your members.
- ✓ When it comes to communications, build a relationship with a new member before putting them in the email marketing cycle.



CONSIDER THESE QUESTIONS

When planning onboarding engagement with new members, ask:

- ✓ What was their reason for joining?
- ✓ How did you attract them in the first place?

The answers will guide you in managing new-member expectations and demonstrating your Association's value.

CONTACT US!



Learn more by contacting:
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OR



Call:

1.800.825.9171