AVOIDING THE PITFALLS
OF THE
NEW-MEMBER ONBOARDING PROCESS

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New-member onboarding is fundamental to an association's success.

Association industry vernacular defines onboarding as a process through which new members move from being organizational outsiders to becoming organizational insiders.

Translation? **Onboarding is a party and your association is the host.** Consider the following two scenarios:

In one scenario, you've recently met a new acquaintance and invite them to your party. When they arrive, you don't greet them, you don't point them to the buffet, you fail to introduce them to other guests, and when it ends, not only do you not thank them for coming, you don't even say goodbye. Then when they don't show up to your next party, you scratch your head and wonder why.

The other scenario goes like this. You invite that person to the party and the day of, you text them and tell them you're excited to see them. When they show up, you hang up their coat, make sure they have refreshments, and introduce them to some of the other guests. Later, you take some time to chat with them one-on-one.

When the party winds down, you walk them to their car, and the next morning, you give them a call, letting them know how much you enjoyed seeing them.

It's fairly simple to see where this is going, right?

ONBOARDING BEST PRACTICES

BE DELIBERATE.

Timing is critical. When a new member joins, they're motivated and excited. You have their attention, and this is the one chance to set the tone. Make it count.

Onboarding involves more than a checklist and shouldn't be an afterthought. According to research by Dynamic Benchmarking and Amanda Kaiser of SmoothThePath.net, associations with an official plan have 4% higher renewal rates than those without.

SET A GOAL.

What is the association trying to achieve? **If there isn't a goal, there isn't a way to determine if the onboarding process is producing results.**

TAKE TIME TO PLAN.

Getting it right supersedes doing it fast. Understanding the association's member persona makes a big difference to the success of the process.

Some associations divide new members into different demographics and have a specific plan for each group.

Knowing why a new member joined, how they were attracted to the organization in the first place, and most importantly, what they want, is key to an effective onboarding program. **If an association doesn't have a laser focus on what new members (or any members) want, how can they deliver?** Demonstrating value is impossible if expectations haven't been met.

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SET A BUDGET.

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. **New-member onboarding is a process that is clearly worth investing in,** and with some planning and organization, it will make a big difference in an association's success.

The above-referenced research shows that **organizations that earmark as little as 1% of their budget for onboarding have higher renewal rates.** Bigger organizations tend to set aside more. Regardless of size, associations should commit something. After all, something is better than nothing.

CHOOSE AN ONBOARDING LEADER.

Delegate a specific staff member to oversee the onboarding process and ensure they are actually given the time to do it right.

SET A TOUCHPOINT SCHEDULE.

It is the foundation of the onboarding process. Be sure to set a timeline. Statistics from the study show that a 12-month schedule yields the strongest results. The argument can be made that the second half of the schedule is more important than the first. When the new-member glow fades, keeping the association top-of-mind can make all the difference in retention rates. **Consider a 2- to 3-year schedule.** Why not?

ASK FOR FEEDBACK.

Is the association meeting the new-member's expectations? Fingers crossed, maybe even exceeding their expectations? The answers will guide you in fine-tuning their experience.

ANALYZE, ANALYZE, ANALYZE.

The 12-month mark provides the most robust data, but if organizations aren't reviewing statistics at least quarterly, they are behind right out of the gate. **If the onboarding program is a morning beverage, proactive analysis is a double espresso while delayed, reactive analysis is a lukewarm, watery cup of tea.**

MAKE CHANGES.

The results from the association's proactive analysis are only worth something if they are used. **If part of the process isn't producing results, change it - sooner rather than later.** If something is working or performing beyond the association's wildest dreams, determine why. The "why" should be considered for other lesser-performing aspects of the program.

BE REAL.

Associations are composed of people. People interact with other people. **Be a person, not just an organization to members.** Even mass communications should have a human touch. Keeping things conversational and maybe even informal can convey a more personal feel.

DO'S AND DON'TS

✅ **Make the joining process easy.** It's likely their first experience with the organization and it should be smooth.

✅ **The moment they join, reinforce their decision by delivering something of value.** Content such as white papers and webinars, a list of exclusive member benefits, meeting schedules, and on-demand webinars are all worthy options. Be wary of an information dump. Quality over quantity.

✅ **Build online social connections.** It's a simple way to meet them where they are, online. Plus, when done right, it can be on "auto-drive," requiring minimal effort. But - don't rely on it for communications. The study indicates it's not the most effective method to reach members. Other methods identified as ineffective are welcome kits and letters.

✅ **Establish preferred communication method.** Before jumping into an email campaign headfirst, make sure to establish their preferred communication method. Don't smother them. There's a fine line between communicating and spamming. Err on the side of too little over too much.

✅ **In-person events are important.** Determine how to make it a positive experience. Discounted registration can be a big winner. Over half of organizations provide a benefit or incentive to new members. Of those, 37% give event registration discounts. A conference "mentor/buddy," an exclusive break-out session, or a special badge are proven to be effective.

✅ **Be an industry player.** Being active within the industry represented by the association is a no-brainer. It keeps the organization in front of members and indicates commitment to and support of the membership at large.

✅ **Do. Not. Ask. For. Money.** If an association is looking for a way to make new members question or regret their decision to join, asking for money too soon will do the trick. It's tempting, but resist. Instead, go the opposite direction - provide perks for engagement. Positive reinforcement is one of the most basic methods of influencing human behavior, so use it.

Associations work tirelessly to recruit members. The reality is that getting them through the door is a small part of the big picture. If the new-member experience leaves them feeling like a number, all that work counts for nothing except one year's worth of dues. Onboarding is the best method to counter non-renewals. So, it should be a big, if not the biggest, priority of an association.

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