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.

Connection is more than simply sending out a welcome packet and adding them to your Association’s email list. It’s an ongoing process that involves deliberate communication and engagement.

**Onboarding is more than a checklist.** It involves more than just making sure they know how to access their membership benefits. A touch plan to improve onboarding and engagement builds a foundation for long-term membership.

**Exceeding Member Expectations**

- **Day 1-7**
  - Send welcome email.
  - Mail new member packet.
  - Call the member to say “Welcome to the Association.”

- **Day 18-21**
  - Make a check-in call / “Hello, how are things going?”
  - Email a reminder of features available to members.

- **4 Months**
  - Send member welcome letter.
  - Call with information about committees.
  - Email quarterly/semi-annual membership renewals.

- **6 Months**
  - Send reminder into your Association’s email marketing.
  - Call with information about upcoming events.

- **8 Months**
  - Contact with exclusive offers.
  - Send a personal invite to a committee.

- **10 Months**
  - Have a personal-planned phone call.
  - Make a written statement of values.

- **11 Months**
  - Send direct-mail solicit.

- **12 Months**
  - Send annual membership survey.

**Customize This Plan for Your Organization**

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**The Onboarding Cycle Should Continue for Year 1, Year 2, and Year 3+ Members.**

**MEMBERSHIP LIFE CYCLE**

- **Recruitment**
  - Awareness
  - Engagement
  - Onboarding
  - Renewal
  - Retention

**The Onboarding & Touchpoint Schedule**

**WHY NEW MEMBER ONBOARDING MAKES A DIFFERENCE.**

**IMPRESSIONS**

- **Month 1**
  - Make a lasting impression with timely, personalized communications.

- **Month 2**
  - Maintain ongoing, personalized communications that keep members engaged and interested in your Association.

**FIRST YEAR**

- **Month 3**
  - Take the time to ensure they know how to access their membership benefits.

- **Month 6**
  - Keep members engaged and interested in your Association.

**SECOND YEAR**

- **Month 12**
  - Continue to engage and keep members interested in your Association.

**THIRD YEAR**

- **Month 24**
  - Keep members engaged and interested in your Association.

**CUSTOMIZE THIS PLAN FOR YOUR ORGANIZATION**

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**THE CONVERSATION CONTINUES…**

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- **12 Months**
  - Send annual membership survey.

**Onboarding is a process that is worth planning well.** As a first-year member, they are checking in to see if your Association is worth their time. They are making a decision about whether or not to continue to invest in your Association.

**Retention**

- **Month 1**
  - Keep members engaged and interested in your Association.

- **Month 2**
  - Keep members engaged and interested in your Association.

- **Month 3**
  - Keep members engaged and interested in your Association.

- **Month 6**
  - Keep members engaged and interested in your Association.

- **Month 12**
  - Keep members engaged and interested in your Association.

**CONTACT US!**

Learn more by contacting sales@growthzone.com or 1.800.825.9171