For Association and Chamber Pros

Member Journeys:
Working Smarter, Not Harder

A LIVE Webinar with the Michigan

West Coast Chamber of Commerce

Wednesday, February 8th | 11:00 AM CT

GrowthZone
smarter association software

CAE

You Will Receive:

- Today's Webinar Recording

- CAE Credit Certificate

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There's A Journey For That:

Working Smarter, Not Harder

Britt Delo, **Vice President of Membership & Marketing**

☑ One Word

What is one word that describes how you would like members/clients to experience your organization?
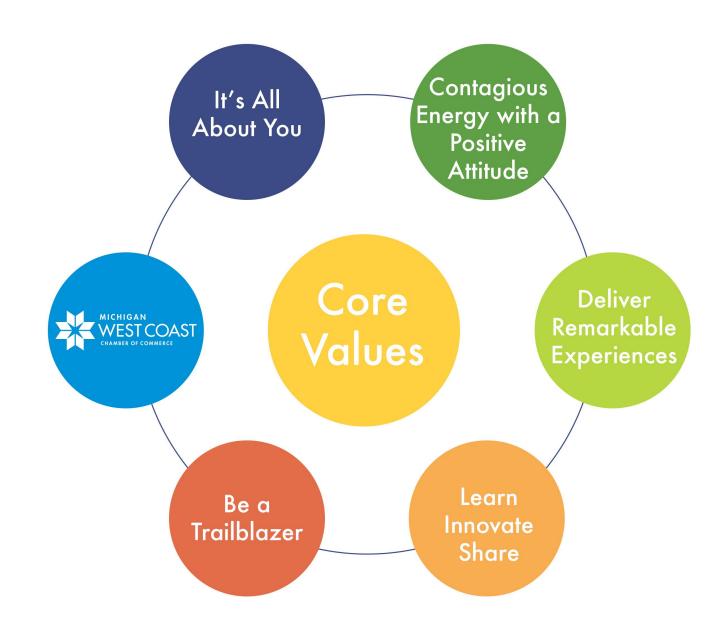
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✓ West Coast Chamber

- Location: Holland, MI

- Members: 1200

- Staff Members: 7

- 5-star Accredited

- Run on EOS

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☑ Who is in the Room?

- **Your Team Size**
  - 1-2
  - 3-10
  - 10-20
  - Over 20

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☑ What to Expect

- What the heck is a Journey?

- Where we were & where we are

- Discover the power of the Journey

- Drive with data

- Begin YOUR Journey

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☑ What the Heck is a Journey

- The Journey Mindset
  - Core processes
  - How to's/checklists
  - Accountability
  - Clear, consistent, and accessible
  - Positive results

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☑ Where We Were

December 2017

- Binders, Word documents, & paper trails

- No customizations

- No accountability

☑ Where We Are

September 2020 through today

- Core processes

- Highly customizable

- Clear accountability

- System and data base driven

- Consistent

- Universally utilized

- We put it to the test…

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☑ Discover the Power of the Journey
New Member Journey

- welcome social post
- personalized outreach
- automated email: membership marketing resources

- attend maximize your membership
- email intro to ambassador mentor
- automated email: make money through your membership

- membership team evaluates engagement
- personalized outreach if needed
- automated email: "celebrating year one"

week one · **month one** · **month two** · **quarter one** · **month six** · **month nine** · **month eleven**

- welcome email/phone call
- connect on social
- discovery meeting
- add to automated journey

- welcome: west coast way magazine
- new member list shared with ambassador team
- automated email: support local through your membership

- personalized outreach

- renewal email

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☑Discover the Power of the Journey

New Member Journey

Name		Project Type	
New Member Journey		Membership ⌄	

Description

New Member Journey Experience and Setup

Template Tasks   **Add Task**

	Name	Task Priority	Task Type	Assigned To Person	Start Date	Due Date	Completed Date
↕	Welcome Phone Call	Normal	New Member Journey				
↕	New Member Setup	Normal	New Member Journey				
↕	More Info Tab	Normal	New Member Journey				
↕	Send Your New Member Journey Starts Here Email	Normal	New Member Journey				
↕	Add to Automated New Member Journey Group (and any groups)	Normal	New Member Journey				
↕	Confirm New Member Photo Plan	Normal	New Member Journey				

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☑ Discover the Power of the Journey

New Member Journey

Name
New Member Setup

Task Priority
Normal

Template Milestone
-- Select a Template Milestone --

Description

- Confirm membership is activated
- Double check no duplicated contacts (individual & business), merge if necessary
- Confirm directory listing is activated (web content tab)
- Set primary rep and user settings (individual contact)
- Set billing preferences based on application and add an billing contact if necessary (Under Profile tab and Billing tab)

-Add new member LinkedIn to Staff Meeting Agenda and/or Facebook Page

-Add new member to photo schedule: New Member Social Post

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☑ Discover the Power of the Journey
New Member Journey

Name

Send Your New Member Journey Starts He

Task Priority

Normal

Template Milestone

-- Select a Template Milestone --

Description

[B] [I] [U] [S] [X₁] [X¹] [A▾] [T↕▾] [🌢] [☺] [¶▾] [☰▾] [☷] [☰] [☰] [☰] [—]

[🔗] [🖼] [⊞] [↺] [↻] [🧹] [↖] [</>]

Use a variation of the template below and personalize as needed:

...#1, If you've spoken with business

Hi [NAME],

We're so glad you're a part of the Chamber community. Here are a few next steps to help you get started with your membership:

- Your profile is live on our website!
- Create your Chamber Account: click here to create and log in. Once logged in;
  - You may make updates to your profile, here is a how to.
  - You may add additional team members. Go to the "My Info" section and click on the "related contacts" tab.

We'd love to welcome COMPANY NAME to the Chamber community on social media. Could you please send over your logo and/or a photo for us to use in our post?

Please reach out anytime – I'm always happy to help.

...#2, If haven't met business yet

Hi [NAME],

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☑ Discover the Power of the Journey

- Ambassadors
- Board of Directors
- Collections
- Current Member
- Leadership Program
- Monthly Publication

- New Member
- Onboarding Staff
- Programs
- Prospect
- Sponsor
- West Coast Cash

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☑ Drive with Data

- A&B member renewals
- Ambassador
- Board
- Dollars to budget
- Journey tasks
- New member sales
- Onboarding tasks

- Open invoices in collections
- Outreach calls
- Program metrics
- Renewed members from collections
- Retention
- Sponsorship revenue

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☑ Begin YOUR Journey

- Create core processes

- Establish clear accountability

- Develop project and email templates

- Customize!

- Drive with data

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britt@westcoastchamber.org

www.westcoastchamber.org

@Michigan-west-coast-chamber-of-commerce

@WestCoastChamber

@miwestcoastchamber

Michigan West Coast Chamber of Commerce

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