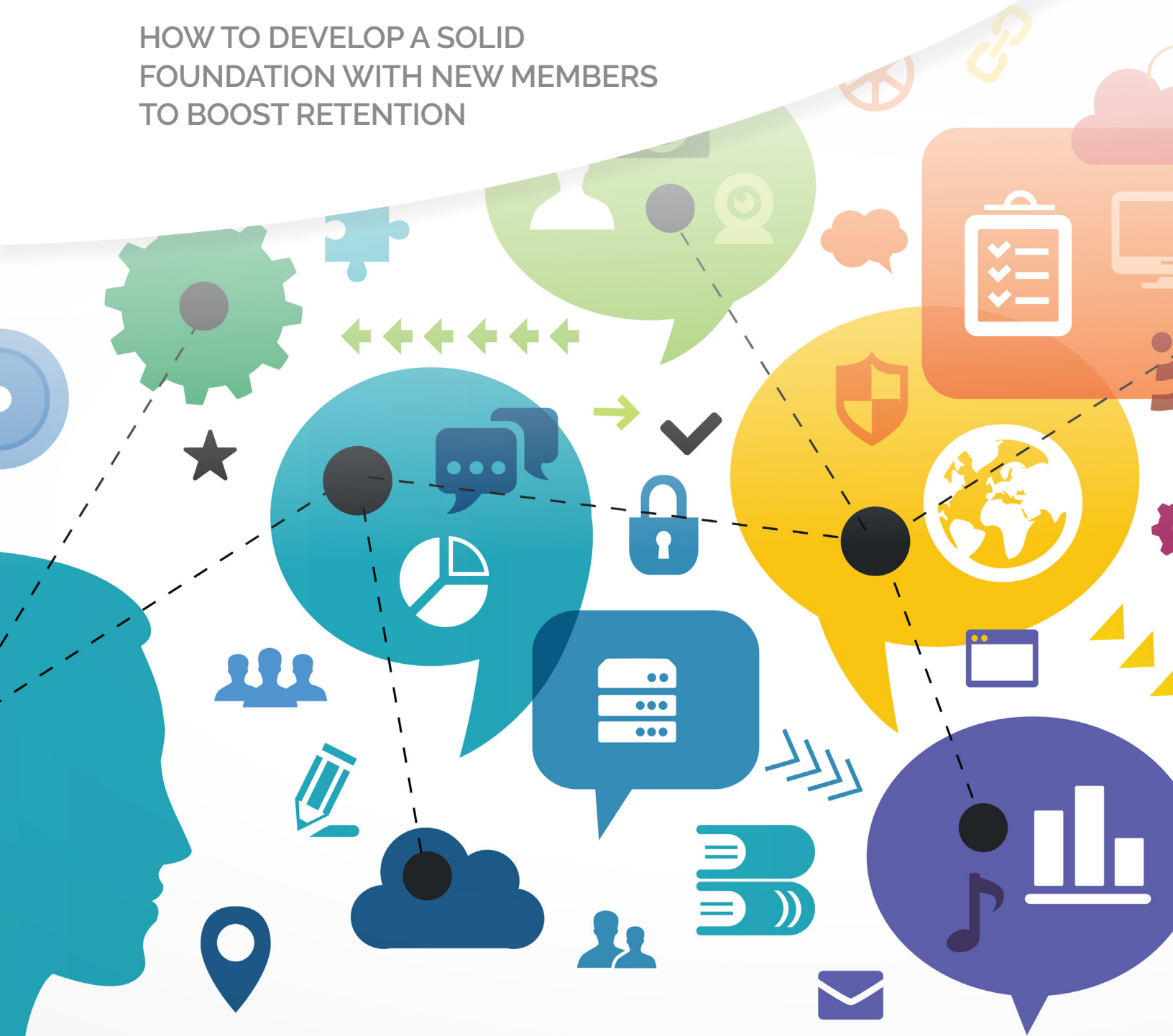


Building a New Member Onboarding Plan

HOW TO DEVELOP A SOLID FOUNDATION WITH NEW MEMBERS TO BOOST RETENTION



Introduction



The average retention rate for members is 84 percent, but the average retention rate for new members is only 70 percent, according to the 2018 Membership Marketing Benchmarking Report from Marketing General Incorporated (MGI). It gets worse for associations with more than 5,000 members— their average new member retention rate is less than 60 percent.

The most commonly cited reason for non-renewal is “lack of engagement with the organization,” according to the MGI report. That explains why most associations (62 percent) have a tactical plan to increase member engagement.

If you want to develop a solid relationship with a new member, the first year of membership is crucial. With a new member onboarding plan guiding the way, you can help members immediately get value from their membership in a way that works for them. At renewal time, they won't think twice about making another dues payment.

Read on to learn how to create a new member onboarding plan to establish the right foundation with new members and boost retention rate.

Have a 12-Month Onboarding Email Campaign Plan

A principal element of a new member onboarding plan is the email campaign.

According to MGI, 33 percent of associations use an ongoing engagement campaign during a member's first year. Amanda Kaiser says the most successful onboarding programs (as measured by new member retention rates) follow new members for seven months or more. These campaigns are growing in popularity as more associations adopt marketing tools that allow email automation.

Instead of overwhelming new members with information about the association, take this opportunity to learn more about them so you can better shape their onboarding experience and more effectively tailor future marketing campaigns.

During the onboarding campaign, provide small chunks of information spaced out over time. This type of information is easier for a member to digest and remember. Set up an automated campaign for each member persona.

- Month 1: Send a weekly email in addition to a phone call
- Months 2 and 3: Send an email every two to three weeks, and schedule another phone call.
- Months 4 to 12: Send a monthly email and schedule a quarterly call.



Pro tips: Keep emails brief. Allow plenty of white space by using bullets. Bold the most important information. Make sure emails are easy for a member using their phone to read and click links. Always include a call-to-action, something you want members to do right away.

Many associations keep new members off their regular marketing lists during the first three months of membership so they're not overwhelmed with emails.

Welcome New Members

Send a welcome email to new members as quickly as possible after they click “submit” on their online membership application.



96 percent of associations send at least one welcome email to new members as soon as they click the “join” button, according to a benchmark study on member engagement from Kaiser Insights and Dynamic Benchmarking.

Create a welcome email template for each of your membership personas or segments, and send the appropriate one based on what you learn from the new member’s application. For example, you may have different versions for member type (student, professional, vendor, etc.), membership tier, job or specialty, career stage, or geographic location.

Many associations supplement their welcome email with a phone call or follow-up email to learn more about the new member. Depending on your bandwidth, staff could make these calls, but you may want to offer this micro-volunteering opportunity to members, either membership ambassadors or committee members.

Provide a checklist for guidance so callers remember to get the following information from the new member:

- Reasons for joining, i.e., membership goals
- Interests: to guide decisions about the news, information, resources, and marketing emails you’ll send them
- Career or business goals and challenges

Callers must be knowledgeable enough about association resources and activities to suggest simple steps the new member can take to make progress toward their goals or to help them solve problems. Only recommend free resources for now, for example, online community discussion groups, newsletters, website resources, or webinar and session recordings. They just made a large dues payment so you don’t want to ask them to immediately spend more money.

Offer a New Member Orientation

Sometimes, old practices are still effective - as long as you update them.

An in-person new member orientation serves two purposes: social and informative. Members join your association to meet other members so give them as many opportunities to do that as soon as possible. But, beware the scourge of many an orientation: the boring PowerPoint explaining each department's bullet points.

Instead, focus on new member needs and interests. Send attendees a pre-session poll to learn about their membership goals so you can tailor your presentation to those goals. Don't introduce every single benefit. New members don't care. Instead, show them how to find what they need.

Invite a diverse mix of veteran members who can talk about how they got involved in the association and how they've benefited from membership. Stories are more memorable than bullet points.

Most members can't attend in-person events, so offer quarterly orientation webinars or webcasts on a platform like Zoom where people can see each other, ask questions, and chat among themselves. Give new members the option of using audio only in case they're having a bad hair day. Post the recording in the new member section of your website and on your member portal.



A new member orientation, done well, helps new members find their way and make new friends at the same time.

Share Your New Member Portal Resources



According to the 2018 Membership Marketing Benchmarking Report from Marketing General Incorporated (MGI), associations with retention rates at or above 80 percent are significantly more likely to invite new members to use their members-only website or portal. Make this a priority for your new member onboarding campaign.

Create a New Members section on your website that can be reached from your member portal. You may even want to create a page within that section for each member persona, for example, associate (vendor) members, young professionals,

C-suite aspirants, and solo practitioners. The new member pages for each of these groups could link to relevant website resources, newsletters, educational programs, and discussion groups.

While you have the new member's attention, ask them to answer a poll about their top challenge. List a few challenges as suggested answers but also provide a text box for "Other." Their answers can guide content for future onboarding emails.

Mix Face-to-Face & Digital Approaches

There are many ways you can help a new member get acquainted with your association and take advantage of membership benefits.

Jane Nassiri, director of customer success at MemberSuite, recently told Associations Now that a multi-pronged strategy works best for new member onboarding because members have different preferences for engagement. You can ensure your new member onboarding programs appeal to all members by offering a mix of face-to-face and digital experiences.

Social Media Engagement. "A lot of people are on social media these days," said Jane. "Whether it's a Facebook page, a Twitter account, or LinkedIn, you can reach out by tagging new members in a post." In these social updates, link also to the New Member page on your website, or suggest a Facebook page/group, Twitter list, or LinkedIn group they may find useful.

Collaboration Platforms. If many of your members use collaboration platforms, like Trello or Slack, create a board or channel for new members. The same Associations Now article mentioned a Trello kanban board created by the Iowa Lean Consortium—"an interactive list that helps new members get oriented about the variety of benefits and services."

Membership Ambassadors. Membership ambassadors add a personal touch to new member onboarding. Ask ambassadors to make a welcome call to new members, or send an email if they can't reach the new member by phone. Ambassadors can also arrange to meet new members at in-person events. Make new member/ambassador matches based on career stage, age, specialty/interests, and/or position so ambassadors are able to understand the new member's needs.

One of the best benefits of an ambassador program is the micro-volunteering opportunity it provides to your veteran members. It gives members the chance to make a difference in a way that doesn't take much time at all.

The ambassador's job is to learn as much as they can about the member—their membership goals, interests, and needs—and suggest what they can do to meet those goals and needs. They also check in occasionally with the new member during their first year of membership to assess their success with getting value and to make further suggestions.

Provide support and guidelines for ambassadors, for example, a private discussion group where they can find out about new resources and events, and share tips with fellow ambassadors.

VIP Treatment at Events. Pay particular attention to new members at your events. Provide a "first-timer" or "new member" badge in a colored transparent badge holder, or attach a distinctive ribbon to their badge. If space permits, save some seats for new members in the front rows at keynotes or at tables with board members or ambassadors during meals.

Host an exclusive breakfast, reception or coffee/snack break for new members (and first-timers) before the main event begins. They'll have an easier time if they can meet a few people at a smaller gathering before they walk into a larger crowd. Don't use this as a formal orientation session, focus on networking and the informal mentoring that will naturally happen when new members find themselves amidst a group of veteran members and ambassadors.



CONCLUSION:

A new member onboarding or engagement plan helps you learn about your new member and their interests, needs, and goals. You can educate new members about different ways to get value from their membership, for example, in-person and online educational programs, website resources, newsletters, networking events, and volunteering opportunities. By leveraging different onboarding tactics and keeping a channel open for feedback, you will develop and deepen your relationships with new members, improving your overall retention rates.

An effective, multi-prong new member onboarding plan requires organizing ahead of time and tracking throughout the new member's first year. Ensuring your current association management solution is empowering your organization to do so is key.

We'd love to show you how our association management solutions can empower you to establish a new member onboarding plan.

Contact us to get started.

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