

THE NEW MEMBER ONBOARDING TIMELINE.



The first year of successful membership

When members join your association, the onboarding process plays an essential role. It's an opportunity for you to highlight what you offer new members, enabling them to be successful in their profession. This gets them excited and inspires them to take an active role in your organization.



It can cost **5 TIMES** more to attract new members than it does to retain an existing one

MONTH 1

Start with welcoming new members to your community

Day 1

Send an email receipt confirming membership and/or payment.

Celebrate your new members for joining in your email newsletter, digital publication and online community.

Help new members acclimate with tools such as resource/FAQs webpage, how-to videos and assign a "buddy" to connect with and get to know the organization.

Send a great "welcome" email to new members. Put yourself in a new member's shoes—what information about your association is beneficial to know? Keep it simple, and just include the important information.

Thank them with a personal phone call from your executive director, board member or membership manager.

Host a new member orientation webinar to allow the opportunity for open Q&A, connect with other new members and share benefits.

MONTH 2-3

New member engagement campaign

Create a "welcome" email series that explains your association and its benefits. Create multiple emails your new members will incrementally receive after they join. These emails can include more detailed information about your association, explanations of benefits, helpful tips or recent blogs—anything that adds value for your new members.

Use personalization as much as possible. This is a great way for your new members to feel connected to your community. This will set them up for greater engagement in the future.

Community Brands Digital Evolution Study found that 79 percent of members say that it is very or somewhat important that their organization provide targeted, valuable content. Yet, only 18 percent of organizations personalize the content members see.

Track new member engagement

Identify your most engaged members and which members are disengaged.

View trending content by evaluating your email reporting.

Determine trends in demographic groups to see who are the most engaged.

Reward members for engagement by liking or resharing their posts, give Kudos in your online community feed or forums.

MONTH 4-6

Listen to your members

Check-in with your members. Give them a call, email or message within your online community to see how satisfied they are with their membership so far.

Ask for feedback about their onboarding experience so far by sending them a survey.

MONTH 7-9

Foster continuous engagement

Send email reminders for online community. Share new discussions forums, trending posts and calendar of events automatically with email alerts.

Recruit and share volunteer opportunities. Start simple with sending an invitation email with micro-volunteering opportunities such as virtual events support or being part of a service project.

MONTH 10-11

Communicate the value 90 days before renewal

Reinforce the value of membership by reminding members of the benefits they have taken advantage of, such as event discounts and learning opportunities.

Remind members of the benefits they have not yet taken advantage of, and that there's still time to do so. Be sure to highlight specific benefits that may help them advance their careers.

Share upcoming events and opportunities they'll miss out on if they don't renew.

Send a 30 day renewal notice or a reminder that members can be automatically renewed. Some members simply forget to renew.

MONTH 12

Renewal date

Thank your members for a great year so far. Don't just include an invoice in your renewal reminder letter. Make sure to thank your members for all the activities that they have either volunteered in, engaged with or benefits that they have used.



Don't forget that your organization should continue these steps even after the first year of membership.

Find out more about why YourMembership AMS is the ideal solution for onboarding your members and increasing member retention.

Get the guide