

# Four Best Practices for Successfully Onboarding New Members



A new member's first weeks represent a critical time for your organization to drive engagement, demonstrate value and gain buy-in for your mission. Onboarding is your best chance to personalize your association to your new members and connect with them – from day one.

Done right, member onboarding is the first step in a long journey for members, one where they continue to connect with your organization and with each other to create lasting, meaningful relationships. It's critical to take the time to make a good first impression, ensure they're informed, share your impact and keep them involved.

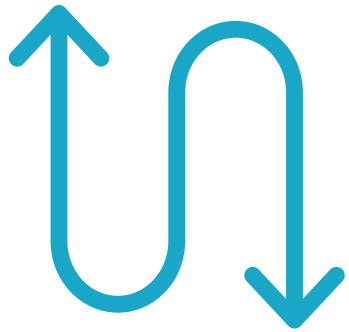
**Remember: You don't get a second chance.**

But don't let the pressure get to you. Here are some simple steps to help you create a process that achieves your goals and helps you grow a passionate, committed and highly active member base.

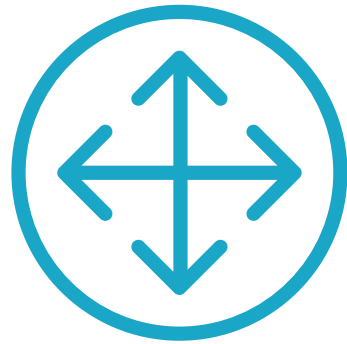


# First, let's tackle a few myths.

Great onboarding is not...



**A linear path.**  
Every member is different.



**One size fits all.**  
What motivates some won't work for others.



**Set and forget.**  
To drive engagement, you must also be engaged.

*Now, let's take a look at the steps to a powerful onboarding process.*



# WELCOME MEMBERS: Getting started

## The first step? Personalize, personalize, personalize!

Take time to understand who your members are, including their interests, so you know who you're talking to. Get to know your new members by:

- Send a welcome survey with questions designed to understand why a new member joined and what they're looking to get out of their membership.
- Develop a buddy program where a current member calls a new member to learn more about their interests and make them feel welcome.
- Host a new member orientation where newbies can learn about all the ways they can get involved.

This allows you to highlight the most relevant engagement opportunities and show that you care about what's important to them. Align with members from their first interactions to help them start internalizing the value of your organization.



## Apply your learnings to enroll your new members in a personalized welcome series that...

- Re-iterates the values of your association
- Shares how they can get involved in ways that align with their skills and interests
- Invites them to participate in conversations with other members in the community
- Shares key information, new-members-only events and connects them with an ambassador who can serve as a friendly face to answer their questions
- Includes personalized messaging based on their unique needs



# DEMONSTRATE VALUE & GAIN BUY-IN: Remind them why they're here

**New association members are riding a wave of enthusiasm about your mission.** Like someone arriving at a party, they're excited and ready to get involved. But, getting started and staying involved can be challenging. Be sure to engage them up front with a variety of opportunities:

- Provide an online community, a digital space where new members can connect with other members, access valuable resources and engage with events and programs that meet their needs
- Create an interactive tutorial to help new members navigate your site or online community upon their first login
- Use simple, direct messaging and easy-to-understand visuals
- Identify ways they can get involved *right now*



## Did you know?

**55%** of people say networking with others in the field is the top reason they join an organization.<sup>1</sup>



# ENCOURAGE NEXT STEPS: Leading the way

Make your organization part of their everyday online habit by always providing new ways to participate.

- Share examples of how other members are getting involved across all of your digital properties (i.e. "This post is generating a lot of activity. See what all the buzz is about!")
- Inspire action by making suggestions (i.e. "You haven't added a profile bio. Would you like to add one now?") and asking members to get involved or volunteer.
- Send quick reminder emails to members who haven't engaged online or attended an event in a few weeks. (i.e. "Haven't seen you in a while! Here's what you missed...")
- Make it easy to find nearby events and connect with others in their area (Remember: Onboarding locally drives global goals!)
- Create gamification opportunities that incentivize members to participate in activities and reward them when they do.



## Did you know?

**31%** of association non-volunteers listed "no one had asked them" as a reason for not getting involved.<sup>2</sup> Don't miss out on a chance to engage a new member—ask them to attend an event, volunteer or share your mission with others.



# ANALYZE AND OPTIMIZE: Improving the experience for future new members

You'll want to make adjustments to your onboarding process as you go along to ensure that you're delivering the best possible experience for new members and encouraging them to get involved and stay active in your organization.

Most changes to an onboarding program don't require big dollars – they require creative thinking, clear messaging, resources (staff or volunteer!) and a plan of action to put them in place.

## Review your member data regularly to understand:

- Where are most new members in the onboarding process?
- What types of content are new members engaging with most?
- Are those members most actively engaged in the onboarding process also more likely to renew their membership?



## Did you know?

Out of 205 associations surveyed in 2018, the average membership retention rate was **84%**<sup>3</sup>





## PRO TIP

**Data visualization enables you to quickly identify areas of opportunity at-a-glance.**

It can also help you...

- Segment member contact lists for better email personalization
- Identify when new member engagement tapers off
- Learn which programs or types of content are most effective

Building a successful onboarding process isn't something you can accomplish overnight. It takes time, dedication and access to data that helps you make better decisions on how to engage members.



## About Personify

Personify is the market-leading Constituent Management and Engagement (CME) platform that empowers nonprofit organizations to better engage their constituents, maximize revenue and optimize operations. For over 20 years, Personify has served as the technology foundation for organizations of all sizes from the largest associations, charities, YMCAs and JCCs to emerging nonprofits. Nearly 25 percent of the U.S. population interacts with Personify through their involvement in nonprofit organizations. For additional information, visit [www.personifycorp.com](http://www.personifycorp.com).



# References

<sup>1</sup> Marketing General Incorporated. *2017 Membership Marketing Benchmarking Report*, 2017.

[http://marketing.marketinggeneral.com/acton/attachment/6893/f-006f/1/The\\_2017\\_Membership\\_Marketing\\_Benchmarking\\_Report.pdf](http://marketing.marketinggeneral.com/acton/attachment/6893/f-006f/1/The_2017_Membership_Marketing_Benchmarking_Report.pdf)

<sup>2</sup> ASAE Center. *Mutually Beneficial Volunteerism: Opportunities for Enhancing Association Volunteer Management Systems*, 2017.

<https://www.asaecenter.org/publications/109027-mutually-beneficial-volunteerism-opportunities-for-enhancing-association-volunteer-management-opportunities>

<sup>3</sup> ASAE Foundation. *Benchmarking in Association Management: 2018 Policies and Procedures, Vol 1*, ASAE 2018.



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can engage new members and deliver  
more value to them?

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