



How to Create Amazing Journeys for New Members:

Be a Host with the Most

presented by:  MatrixGroup[®]
International, Inc.

What happens in the first 30-90 days of a member's journey with your organization matters. Really matters.

Because it's during those first few days, weeks, and months that your new member decides to engage with you in a meaningful way. They made the decision to join. Now it's up to you to help them make the decision to **stay**.

How do you do it? A great way to approach new member onboarding is to **think of your new members as first-time house party guests**. Any good host's number one goal is going to make their guests feel welcome, comfortable, and connected. You give them a big, warm welcome, show them around, offer them food and beverage, make introductions to other guests who you know have similar interests, point them in the direction of the bathroom, and check in on them regularly. And if you don't? That guest is unlikely to accept a future invitation, and may even leave the party early.



How to Be a Host with the Most to Your New Members

A Warm Welcome and Authentic Connection

When a new member comes in (both individuals and companies), make sure you tell them loudly and clearly that you're happy and grateful they made the decision to join. Greet them warmly, and greet them quickly. Make them feel like a VIP, and make them feel at home.

A great way to do this is to send them an email from the CEO, Board chair, or president welcoming and thanking them, and asking them what they hope to get out of their membership. We know the C-Suite is often too busy for a daily task like this, so a great workaround is drafting an email that looks like plain-text in your email marketing platform, and setting it to come "from" the email address of the CEO/Board chair/President. If you really want to make your new members feel welcome, have your CEO, Board Chair or a senior staff person actually make a phone call. It's easy to send an email, more difficult to make a phone call. And even if your member never gets to connect with the leader who's calling, your members will love hearing a welcome voice message.



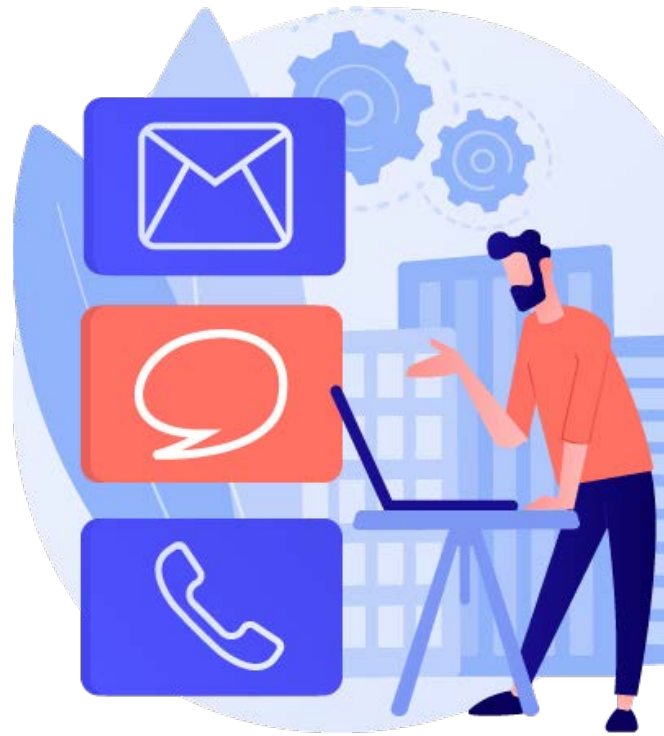
Ease Them In; Slowly Introduce Them To Your Organization and Services

When you answer the door and welcome a new guest into your home, you don't bombard them with everything they might need to know to get them through the evening in the first 60 seconds and abandon them for the rest of the evening. Instead, you ease them in by taking their jacket, chatting a little, and offering them a drink.

Take the same approach when onboarding your new members: **give them bite-sized pieces of information to get them acquainted; don't throw everything at them at once.**

What does this look like? We recommend 4-8 emails, spread out over 90 days, introducing your members to your staff, your products and your services. Give them advice about how to navigate your services, tell them what an involved member looks like, and recommend a few next steps.

We also recommend that you keep them off of your regular communications (e.g., your newsletter and marketing emails), which often use insider language, until they're more acclimated - usually around the 3 month mark. Until then, they should be getting curated communications to introduce them to the organization, just as you would use different language and a different approach to offer food or drink to your new guest versus your guest who is a lifelong friend.



Make Good Introductions

The best hosts are adept at making thoughtful introductions and facilitating meaningful conversation. They make their guests feel like they fit in amongst friends by making connections and providing conversation starters that are relevant and helpful.

In the same way, you must facilitate member connections, and tailor recommendations based on what you know about the new member to make them feel at home in your organization. **Guide them to the content, resources, and communities that will be the most beneficial to them based on their member type, organization type, or other demographic.** To achieve this, we recommend inserting customized emails in your new member email campaign; these messages can be tailored to their specific interests, industry, gender, geography, etc.

If you have members attending a conference for the first time, do NOT leave them to navigate your event on their own. Pair them up with seasoned members who can acquaint them with the schedule, tell them which events are "can't miss" events, accompany them to a social event or two, and introduce them to three other members. Imagine getting that kind of treatment at your next conference; you'll be attending for life!



Check In Often

When you have a new guest in your home, you don't welcome them, show them around quickly, and then ignore them for the rest of the evening until it's time to say goodbye. Good hosts check in on all of their guests periodically, and especially the new ones. Is there anything you can get them? How are they enjoying themselves? Were they able to find the restroom?

You must do the same for your new members. **Be sure to be in regular contact with them throughout their first year of membership** to remind them where resources are, make sure they're getting value out of their membership, and to make them feel cared for and valued. It will make all the difference! You can do this through scheduled emails and check in phone calls. These phone calls don't have to be long, but in our experience, they are valued AND they provide great insight into the new member experience.

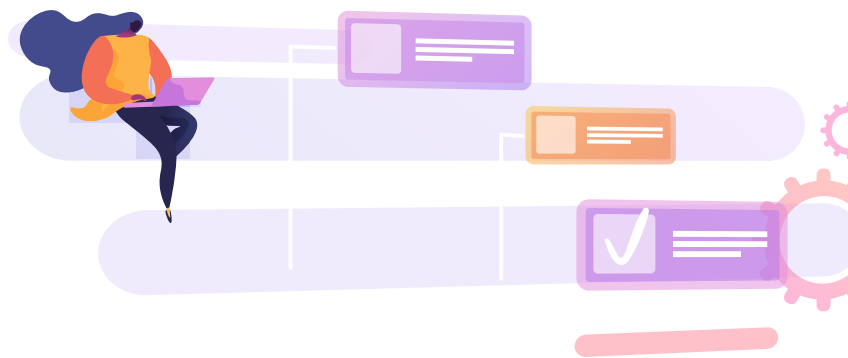


Invite Them Back

When it comes for the night to end, a good host spends time talking to each guest, thanks them for coming and for what they contributed, and shows excitement for the next event. "We were so glad you were able to make it! We saw that you got to talk to Chris for a while about fishing and connected with Anita about getting involved in her next charity event. I knew you all would be fast friends. Next time, I'll have to introduce you to Dave - his love for cycling rivals yours, which is hard to imagine! Oh, also, thanks for bringing the dessert - it was the talk of the evening!"

In a similar way, **before renewal begins, be sure to thank your new members, remind them how they were involved, how they benefited, and also make them feel like their involvement and contributions had an impact on the organization over the past year.**

Everyone wants to feel valued and heard. Also be sure to tease the big things coming up in the next year, and how they benefit from, and fit into, those initiatives, so they don't want to miss out. When the next invitation comes - ie renewal - it will undoubtedly be a quick yes.



Sample New Member Onboarding Workflow

Now that you understand the theory behind it, you're probably wondering how to apply it.

We've put together a sample workflow of a successful new member onboarding campaign to show you what this might look like in practice.

Keep in mind, however, that this isn't a one-size-fits-all. Every organization will need to tailor their new member onboarding campaign based on their unique member needs, offerings, and goals, but this is a good starting point:



WEEK 1

- **Send a welcome email.** This should simply be a “we’re happy to have you here” email. No action items. Just a warm welcome. If you do give an action item, keep it to one, and make it simple.
- **Make a welcome call**
- **Send a welcome card in the mail**
- **Send an email about accessing your members only portal and updating profile.** If you have a video walking through your portal, this is a great place to highlight it!

WEEK 2

- **Send an Email Highlighting 3 Key Member Benefits.** Segment these by member type if you can!

WEEK 3

- **Send an email about how to get connected with the community**

WEEK 4

- **Introduction to staff.** Who to contact in which departments with specific questions.

WEEK 5

- **Send an Email Highlighting 3 Other Key Member Benefits.** Again, segment these by member type

WEEK 6

- **Call to check-in**
- **Send an email highlighting upcoming events.** Give background on your events.

WEEK 8

- **Email a piece of evergreen, useful content.** Again, segmented by member type

WEEK 10

- **Analyze how they are using their membership.** Look at events they've attended, what resources or content they've accessed, if they're engaging in your community, etc.
- **Send an email reminding them about a benefit / offering.** Or, highlight some other lower-tier membership benefits that you haven't introduced yet.

WEEK 12

- **Send an email introducing your member communications**
- **Add them to your regular communications / marketing email sequence**

MONTH 4

- **Email highlighting volunteer opportunities, networking opportunities and other ways to get involved**

MONTH 5

- **Email reminding them of another key offering**

MONTH 6

- **Analyze how they are using their membership**
- **Send them a survey**
- **Give them a call to check in.** Be sure to follow-up with information based on your conversation

MONTH 8

- **Email a piece of evergreen content that touches on a member benefit.** Again, segment this by member type

MONTH 9

- **Highlight a member success story.** Call to action: how has being a member impacted you? How can we better support and serve you?

MONTH 10

- **Make a pre-renewal phone call.** Be sure to follow-up with information based on your conversation
- **Email: we're so happy to have you. Reminder of key benefits.**

MONTH 11

- **Renewal reminder email**

MONTH 12

- **Make a phone call to check in BEFORE sending renewal**
- **Send renewal**

Need help crafting a new member onboarding campaign?



How you welcome and nurture your members in the first three months and first year of their membership have a huge impact on these members' willingness and eagerness to renew their memberships, get involved, and spread the word about your organization.

If you need help designing and implementing your new member onboarding campaign, or need a bit of guidance to get your started, we are here to help. Matrix Group has been in the amazing member journey business for over twenty years. We help trade associations, professional societies and nonprofits increase their membership, retain their members, generate non-dues revenue, and streamline their operations. We do this through web, mobile, social, custom development and virtual/hybrid events.

If you're looking to get started with marketing automation and new member onboarding, we can:

- Audit your current onboarding campaign
- Develop a new strategy
- Draft emails
- Create a schedule
- Create email templates
- Schedule the email sends
- Manage the campaign!

Whether you need just a few hours of consulting, or you need an organization to develop and implement the whole campaign, we are here to help you make new member onboarding painless, effective and amazing!



Contact Bryan Clark, Director of Strategic Partnerships, to schedule a free consultation.

bclark@matrixgroup.net | (571) 282-5888

www.matrixgroup.net



MatrixGroup®
International, Inc.

© Copyright 1999–2022 Matrix Group International, Inc. ® All Rights Reserved.