Better Onboarding
New member onboarding is critical to retention. Statistics show that it costs 7x more to obtain a new member than to retain a current one and that first-year members have the lowest renewal rates.

Onboarding is more than simply sending out a welcome packet and adding them to your Chamber’s email list – it’s an ongoing process that relies on deliberate communication and engagement.

New Member Onboarding
Welcome email
Welcome Email

From:

Subject Line

First Line
Email Contents

Use your brand

Reinforce their decision

Give a Call to Action

The Power of the Welcome eMail
Member Information Center
MIC for New Members

• Get them into the MIC as soon as possible
  • Allow username/password creation on the online application form (Primary and/or Billing contacts)
  • Email the *Introducing Member Info Center* email template by the end of their 2\(^{nd}\) week -- Check to see if they’ve created a login by 3\(^{rd}\) week; follow up with a *phone call* regardless…

• Send them videos about how to use the MIC

• Recruit an existing member to connect with them and talk specifically about how they use the MIC

• Hold them accountable 😊
3 Events
Events

You want your members interacting with each other and seeing the networking benefits of membership as soon as possible.

• Send new members personal invitations to events happening in the first X months of their membership and to your “big events” their first year.

• Consider an additional discount for the first event they attend.

• Hold a New-Members Mixer X times/year and make the new members special guests
4 Personal touchpoints
Personal Touchpoints

Relationships matter.

ChamberMaster and MemberZone can automate a lot of your tasks.

Developing relationships with your members isn’t one of them.

- Schedule coffee with new members part way through their first year.
- Stop by their business at least once every 6 months.
- Send them newspaper clippings with a personal note when you see them in the paper.
- Send them some useful content specific to their business.
Free up some time

Let ChamberMaster do the things it’s good at:

• Set up GrowthZone Pay (Integrated Payment Processing) and auto-payments
• Email invoices
• Empower your members to submit events, deals, and news items, via the MIC
• Post Resources in the MIC for easy and 24/7 access
IT'S BEEN LOVELY BUT I HAVE TO SCREAM NOW
5 Project Management
# Projects & Tasks

<table>
<thead>
<tr>
<th>Project</th>
<th>Category</th>
<th>Owner</th>
<th>Start Date</th>
<th>End Date</th>
<th>Total Tasks</th>
<th>Completed Tasks</th>
<th>Remaining Tasks</th>
<th>% Complete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wanda's Golf World</td>
<td>Member</td>
<td>Daniel Johnson (Member Coordinator)</td>
<td>5/18/18</td>
<td>5/25/18</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>66.667%</td>
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<tr>
<td>Onboarding</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ace Hardware Onboarding</td>
<td>Member</td>
<td>Cheri Petterson</td>
<td>5/18/18</td>
<td>6/1/18</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>50%</td>
</tr>
</tbody>
</table>
# Projects & Tasks

**Ace Hardware Onboarding** - created 5/18/18 by Susan Williams (Executive Director)

**Member:** Ace Hardware  
**Project Owner:** Cheri Petterson

<table>
<thead>
<tr>
<th>Task</th>
<th>Task Type</th>
<th>Person</th>
<th>Start Date</th>
<th>End Date</th>
<th>Modified</th>
<th>%</th>
<th>Completed Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Welcome email</td>
<td></td>
<td>Julie Nelson (Finance)</td>
<td>5/19/18</td>
<td>6/4/18</td>
<td>6/6/18</td>
<td>50%</td>
<td></td>
</tr>
<tr>
<td>Deliver Welcome Package</td>
<td></td>
<td>Daniel Johnson (Member Coordinator)</td>
<td>6/20/18</td>
<td>6/4/18</td>
<td>6/6/18</td>
<td>100%</td>
<td>6/6/18</td>
</tr>
</tbody>
</table>

[Image of the interface]
Projects & Tasks

Task Add/Edit

- **Task Name**: Welcome email
- **Project**: Ace Hardware Onboarding
- **Parent Task**: Parent Task (optional)
- **Description**: send a welcome email with link to create MIC account
- **Start Date**: 19-May-2018
- **End Date**: 04-June-2018
- **Assigned To**: Julie Nelson
Related Training

Communication & Groups
Member Information Center (MIC)
Event Setup
Event Management

Working with Projects & Tasks

Look for additional 5 Ways... webinars by entering “5 ways” in the search field of the training calendar!
Thank You!