



ARMA HQ NEW MEMBER COMMUNICATIONS

Tips, Best Practices, and Sample Content

REV A-2018

New Member First-Year Communications: Tips and Best Practices

At ARMA HQ, we recently implemented a comprehensive campaign with a more progressive timeline based upon the 3-day/3-week/3-month engagement strategy, now a best practice in the association industry. We aim to confirm their decision to join by Day 3, get them to engage with a resource by Week 3, and convince them to renew by Month 3. The campaign employs 11 electronic notices, 3 print notices, and 2 personal outreach phone calls that all incorporate the concept of the new member experience as a journey, with the suite of communications serving as a roadmap and directions for that journey.

We have included content from the full first-year communication cycle that is sent in our current campaign to give you a feel of how you may craft your notices and letters and to consider incorporating in your campaign. We utilize several value trigger points, with links to publications, education, and networking opportunities to provide easy access for new members to get the most out of their membership.

Also, don't forget to dedicate resources to personal outreach with phone calls to new members shortly after they join. You can do this at the chapter level, and we encourage you to volunteer with HQ's [New Member Welcome Committee!](#)

We would enjoy hearing from the chapters about what they are doing and how they approach the new member onboarding and engagement process with their members. Please reach out to us and share your great work!

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Day 1: Welcome to ARMA

Welcome! Your ARMA membership journey is about to begin!

On behalf of your fellow members, the association's board of directors, and staff, please accept our thanks for your decision to become a member and to join us on what is an exciting and rewarding path of professional development and success in your career.

We're here to help you learn about your membership, how to utilize the many resources available to you, and how to connect with opportunities and other members to optimize, energize, and customize your first-year experience.

Now, let's get you ready for this exciting adventure with some tips that will get you on the road to success.

Get Acquainted with Your ARMA Profile

1. Login to ARMA.org.
2. Complete your profile and communication preferences.
3. Explore the website features and check out your fellow members.

By logging into ARMA.org, you can build your profile, access your online education and electronic resource purchases, contact other members, and renew your membership.

Need help with your profile? We have a very helpful [FAQ page](#) for any questions you have about how to control what is public on your profile or other items related to your ARMA.org experience.

Over the coming weeks and months, we'll continue to provide more introductory information about your membership and check in to see how you are doing.

Until then, congratulations on making the decision to enrich your career and your profession by joining ARMA International. Please don't hesitate to contact our trusty member services team with any questions about your membership by [e-mail](#) or +1.844.565.2120 (U.S. and Canada) or +1 913.444.9174 (outside of the U.S. and Canada).

Happy travels!
Lia Shore
Senior Manager, Membership

Day 4: Your ARMA Welcome Packet is on the way!

Hello, NAME. Are you enjoying your first week as an ARMA member? I hope so, because there is so much more to discover.

Here are a few things to get you ready for the road ahead.

Your official **ARMA Member ID** is: MEMBER ID

Respond to this [brief survey](#) and tell us more about yourself and why you feel that ARMA can give you the tools and solutions to help you succeed. Let's get to know each other.

Soon you will receive a **welcome packet** to help you plan your travels as an ARMA member and customize your experience. It will share guidance to help you locate the diverse resources at your fingertips and how to get better acquainted with ARMA and the vast array of information that can take your career to the next level.

Visit ARMA's [New Member Central](#) to begin your exploration of all ARMA has to offer, and visit frequently during your journey to discover new tools and resources that become available as the profession's challenges evolve.

Check your mailbox for your welcome packet, complete with your exclusive **Roadmap to the ARMA Membership Journey!** And don't forget to complete your profile at [ARMA.org](#) to help get you started on your adventure.

Happy travels!
Lia Shore
Senior Manager, Membership

Day 7: Your Exclusive Invitation to the ARMA Mentorship Program



Dear FIRST NAME,

We hope you are getting acquainted with ARMA and exploring your exciting new benefits of membership. Did you know that ARMA has a program that's designed to help you engage and make connections, receive professional guidance, and share knowledge?

ARMAMENTORSHIP

I would like to *personally invite you* to participate as a mentee in the **ARMA International Mentorship Program** to enhance your member journey. This flourishing program has been confirmed by our members to provide an enriching experience, an excellent opportunity to expand their professional networks, and to greatly benefit both mentors and mentees.

In the program, seasoned members are matched with those who are newer to the field and who are seeking professional guidance. Matches are made based on the results of our short survey, which optimizes the partnerships.

Whether you are new to the profession, looking for specific professional guidance, or want to explore new industries or skills, I hope you will [sign up](#) and learn from someone who has managed similar challenges and pain points in the information management field.

Mentors and mentees are matched twice a year. For a list of term dates and deadlines, please see the [mentee FAQs](#). To participate, simply read the [code of conduct](#) and fill out the [matching survey](#). We will connect you to your mentor or mentee after the deadline of the term for which you apply. Once you are matched, you will receive an e-mail introduction, and you can start connecting right away.

I think you will truly enjoy connecting with a fellow ARMA member, and the program will enhance your journey of professional growth. If you have any questions about the program, please send me an [e-mail](#), and I will be happy to help!

Stay tuned for featured resources from *Your Roadmap to the ARMA Membership Journey*, where we will spotlight the top resources you can use to engage and get up to speed!

Happy travels!

Lia Shore

Senior Manager, Membership

Week 1: Welcome Packet Print Letter

FIRST NAME, I am so happy to welcome you as a member of ARMA International. Now, let's hit the road! This packet connects you with your community and the new resources and solutions that will help speed you down the road to greater success.

To ensure that we get your membership off to a stellar start, we have enclosed something special to help you chart your way through your new experience.

Your Roadmap to the ARMA Membership Journey

Need access to our learning resources that can help you develop your skills? Looking for solutions to a challenge or a new project? Want to connect and build your professional network? This roadmap has got you covered with designated **InfoStops** that have helpful tips and instructions. Each **InfoStop** is unique and contains resources to empower you and help you start your journey the right way.

To express our appreciation for your decision to join ARMA, we are giving you a **FREE COPY of Records and Information Management: Fundamentals of Professional Practice**, the best-selling, comprehensive “go-to” book by William Saffady for all things information management. This text is perfect for all experience levels, from those new to records management to those looking to expand their experience or to those seeking CRM or IGP certification, and it will serve as an excellent aid as you progress through your career.

To get your copy, follow these simple steps:

1. Login to your [ARMA.org](https://www.arma.org) profile.
2. Go to www.arma.org/store/ViewProduct.aspx?id=10563513.
3. Enter the **promo code NEWMEMRIM** in the “Apply Promotional Code Field.”
4. Click “Update Price” and proceed with check out.
5. Review your contact information and click “Proceed with Confirmation.”
6. Click “Complete Order.”

Are you ready? Jump right into the roadmap and see where your ARMA Membership Journey will take you. This is *your* ARMA International and *your* road. Make the journey your own – there are no wrong turns, and the best is just ahead!

If you have questions about your membership or need road assistance, please contact our member services team directly by [e-mail](mailto:member@arma.org) or by phone at +1.844.565.2120 (U.S. and Canada) or +1 913.444.9174 (elsewhere).

On behalf of your fellow members, the association's board of directors, and staff, thank you for joining ARMA International. We're glad you are here and look forward to helping you navigate your professional development on the road to success for many years to come.

Happy travels!
Lia Shore
Senior Manager, Membership

Week 2: Your First Roadmap InfoStop: Discover

Are you enjoying the ride, FIRST NAME? As your trusty co-pilot, I'll be checking in from time to time to spotlight the top resources and tools that are included in the membership journey roadmap you received in your welcome packet. Before you begin to explore, **make sure that you are logged into your [ARMA.org](#) profile.**

The first **InfoStop** after your onramp – **Discover** – provides a wealth of information to set you up for success. Make sure you don't miss this resource!

- [The Records and Information Management Core Competencies](#) guide helps you define the skills you will need at each stage of your career as a successful RIM professional and identify your proficiency in each of six defined domains of RIM.

And don't forget to **complete your [ARMA.org](#) profile** to get started with the wonderful community tools and searchable Member Directory available to you. Completing your profile allows you to customize your communication preferences so you will only receive information you are interested in, and nothing more. If you've joined a chapter (we highly recommend you reconsider if you haven't), you will have access to that chapter's group on ARMA.org. Chapters typically have their own websites as well. Find your [chapter's website here](#).

Plan to visit ARMA.org often along your journey!

We'll be back with another Roadmap **InfoStop Spotlight** to support you on your next phase of discovery. See you soon!

Happy travels!
Lia Shore
Senior Manager of Membership

Week 3: ARMA Roadmap InfoStop 2: Learn

Welcome to the next edition of our Roadmap **InfoStop Spotlight**, FIRST NAME! We hope you were able to discover some exciting new tools to help you smoothly cruise to your next stop: **Learn**.

Get ready for an awesome information download! This **InfoStop** warrants a longer stay because it has **important complimentary ARMA fundamentals that will ensure you have a strong foundation** for moving forward in your career. Make sure you take time to review these resources and how they can help you expand your knowledge of all things IM.

- [*Implementing the Generally Accepted Recordkeeping Principles®*](#) provides a thorough overview of ARMA's eight Principles and the Information Governance Maturity Model and how to use them as guidance for developing, evaluating, and improving an information governance program.
- [*The Glossary of Records and Information Management Terms*](#) defines more than 1,000 terms from disciplines that intersect with RIM, and it can help you expand your understanding of IM terminology.
- [*IGBOK: The Foundation*](#), the first component of the upcoming comprehensive reference based on globally accepted IG standards and best practices, will better equip you to be an industry innovator and subject matter expert.

What's even better? These excellent references are available to you 24/7! We recommend you spend some additional "rest area time" at this **InfoStop** to peruse these relevant tools that will help prepare you for the next stops on your journey!

Happy travels!
Lia Shore
Senior Manager, Membership

Week 4: ARMA Roadmap InfoStop 3: Engage

Hi, FIRST NAME. Looks like you're ready to go!

Now that you're better acquainted with ARMA, have explored the core competencies, and have started to build or expand on a strong foundation of fundamental IM and IG knowledge, it's time to get back on the road.

Your next **InfoStop – Engage** – encourages you to further immerse yourself in industry tips and trends, volunteer and networking opportunities, and to take deep dives into resources that provide solutions for critical challenges. Here are a few that can really pay off!

- Dive into [Information Management magazine](#), our digital bi-monthly publication, which includes practical articles, career advice, industry profiles, and much more – including exclusive content for members like you.
- Discover ways to [volunteer and build your network](#) through opportunities with your local chapter, region, and ARMA HQ.
- Take a deep dive with [inDepth](#), the bi-monthly member newsletter that examines the profession's most important topics. Each newsletter contains links to valuable sources of information on the chosen topic and is delivered right to your inbox! Back issues are also available at the link.

Way to go! You have visited more than half of the **InfoStops** along your new membership journey. There's still much more ahead, so buckle up, get in gear, and we'll be back with another featured spotlight soon.

And don't forget, our member services team is always here to provide roadside assistance with any questions you have about your membership. You can contact us by [e-mail](#) or at +1.844.565.2120 (U.S. and Canada) or +1 913.444.9174 (elsewhere).

Happy travels!
Lia Shore
Senior Manager, Membership

Month 2: ARMA Roadmap InfoStop 4: Connect

FIRST NAME, you've become quite an accomplished traveler along the ARMA Membership Journey! Are you ready to take your expertise a "stop" further? Then follow us to your next **InfoStop: Connect**.

ARMA members have many avenues that connect them with their [fellow members](#), [events](#), [local chapters](#), [volunteer opportunities](#), and more. Make sure you reference your roadmap to learn about these opportunities. Here, we spotlight a few we think are great experiences and destinations.

- Because you're a professional member, you receive a discounted rate for [ARMA Live!](#), the profession's premier annual conference and expo. Join over a thousand of your peers and prominent solution providers from around the globe to gather and share their expertise on the latest trends, topics, and technologies. Each year, there are **events and special information for new members**, plus opportunities to connect with your colleagues and perhaps meet your mentor (if you're participating in the mentorship program).
- **Stay connected** with ARMA and the global community anytime by following us on our social media at [LinkedIn](#), [Facebook](#), [Twitter](#), and [YouTube](#). You'll stay up to date with the ARMA movement and with all that's going on throughout the profession. Post about your new membership experience using **#ARMAnewmemberjourney and tag @ARMA_INT!**
- Nothing better complements your journey to connect than remembering to reach out to your travel companions at your [local chapter](#), where you'll enjoy the additional benefits of local interaction, networking, and events.

If you're not a member of a local chapter, there's still time to join; it will help you get the most out of your ARMA membership experience. Just contact [member services for assistance](#).

We've got more resources to share with you, so keep an eye out for the next installment of **InfoStop Spotlights**. See you there!

Happy travels!
Lia Shore
Senior Manager, Membership

Month 3: ARMA Roadmap InfoStop 5: Assess

You've reached a powerful place in your new member journey, FIRST NAME. You have logged many miles discovering, learning, engaging, and connecting with ARMA, your fellow members, and many of the web seminars, job aids, online courses, and publications that we offer to help take your professional development to the next level.

Now is a great time to examine where you are in your journey and to set the course for where you want to go. The best place to do this is your next **InfoStop: Assess**. We've included information on several resources that can help you evaluate your career status and make choices on where you'd like to go. Here are two particularly valuable items for you to explore:

- [**Job Descriptions for Information Management and Information Governance**](#) is a great place to start your research for the next step in your career.
- [**Determine Your Career Path with RIM and IG Certificates and Certifications**](#) can help you plot the map on how to develop your knowledge and skills, boost your credentials, and advance your career by completing one of the leading certificate programs and certifications, such as the Information Governance Professional or the Certified Records Manager.

Feel free to take additional "rest area time" here – it is exciting to contemplate where you go next as you navigate your career. When you're ready, let's get back on the road! We think you'll really enjoy your next stop, so follow us – great things are ahead!

Happy travels!
Lia Shore
Senior Manager, Membership

Month 4: ARMA Roadmap InfoStop 6: Grow

FIRST NAME, now is a perfect moment to stop and reflect on how far you have come on your journey. Nothing is stopping you from even more professional development, and now is a perfect time to spotlight your next **InfoStop: Grow**.

First, remember to take advantage of our exclusive gift to you for joining ARMA! If you haven't done so, please claim your **FREE copy of [Records and Information Management: Fundamentals of Professional Practice](#)**, the best-selling, comprehensive "go-to" book for all things information management.

To get your copy, follow these steps:

1. Login to your [ARMA.org](#) profile.
2. [Click here](#) to add the item to your cart.
3. Enter the **promo code NEWMEMRIM** in the "Apply Promotional Code Field."
4. Click "Update Price" and proceed with check out.
5. Review your contact information and click "Proceed with Confirmation."
6. Click "Complete Order."

Here are two more ways ARMA can help you grow your career, expand your professional skills, and map a course for the next stage of your development:

- The [ARMA CareerHQ](#), our online career search and resume-posting service, keeps you in front of employers looking for candidates like you, and it helps you determine the top compensation for your unique skill set. It also offers a free resume review tool.
- And what better way to round out your journey than by developing strategic and management skills as a leader at the local chapter, regional, or international level. [E-mail our team](#) to learn more about the special opportunities available.

It's hard to believe we are almost halfway through your first-year membership experience. We have enjoyed riding with you on the road to professional development. And with just one more **InfoStop** to go, we look forward to staying engaged and providing you the quality of road service you are looking for. Give us a shout and let us know how you are doing – we'd love to hear from you by [e-mail](#) or at +1.844.565.2120 (U.S. and Canada) or +1 913.444.9174 (elsewhere).

Enjoy the road!
Lia Shore
Senior Manager, Membership

Month 6: Have you used your roadmap? Tell us about your journey!

Hey, FIRST NAME. Have you been using *Your Roadmap to the ARMA Membership Journey*? We hope it has come in handy as a helpful guide to your new membership experience and that our **InfoStop Spotlights** have complemented the entire adventure!

You can tell us about your journey so far in a few ways:

- Pull on over to our brief [new member check-in survey](#) to let us know about your experience and your journey with the roadmap **InfoStops** so far.
- **Record a short video** about your inspiring new member journey with the roadmap, include **#ARMAnewmemberjourney**, **share** on social media sites and tag @ARMA_INT.
- **Snap a photo and post** it on social media to tell us about your new member experience. Make sure to include **#ARMAnewmemberjourney** and to tag @ARMA_INT.

Thanks for sharing! We will be back soon with our final installment of **InfoStop Spotlights** to help you start planning for the next steps of your journey.

Happy travels!
Lia Shore
Senior Manager, Membership

Month 7: Gateway to Your Next ARMA Journey

Are we there yet, FIRST NAME? From the progress you've made on your journey so far and the diverse information you have explored, we hope you agree that you have arrived!

Our guided tour of your ARMA membership is coming to an end, but you made the important decision to dedicate yourself to a lifetime of professional development when you became an ARMA member. And you have **many more exciting benefits, resources, and tools to explore and many more career roads to travel**. Why not start planning now? Here are some tips to help you map out your next destination! (Prep tip: Make sure you are logged into your [ARMA.org profile](https://www.arma.org/profile) before you start planning.)

- Take time to retrace the roadmap and revisit the **InfoStops**. Or, better yet, hop in the passing lane to any **InfoStop** that you would like to visit again for more in-depth exploration.
- Spend time with the resources you discovered along the way and keep your roadmap as a helpful reference.
- If you haven't already, join and engage with [your local chapter](#). Our members tell us that the local connection is one of the most powerful experiences they have as a member.
- Discover additional tools that can help you with your next journey by exploring the [Free Professional Member Resources](#) available to you 24/7 as an ARMA member.
- Visit the [Online Learning Center](#), select [\\$0.00 FREE](#) to filter your search, and gain access to a variety of free web seminars and on-demand educational programs. You can always find all the programs you have downloaded or accessed by visiting the [My Learning tab](#) in the Online Learning Center menu.

Now that your eyes are on the road, you can sit back, buckle your seat belt, and enjoy your ongoing journey of an engaging and empowering membership.

And remember: *"Success is a journey, not a destination."* -Ben Sweetland, Author

Stay in touch so we can assist with anything you may need during your professional development experience. Contact us by [e-mail](#) or at +1.844.565.2120 (U.S. and Canada) or +1 913.444.9174 (elsewhere).

Happy onward travels!
Lia Shore
Senior Manager, Membership

Outreach Phone Calls in First-Year Cycle

- Week 3: New Member Welcome Committee Phone Call
- Month 8: Check-in Phone Call

Print Communication in First-Year Cycle

- Week 2: Roadmap to Your Membership Journey Welcome Packet
- Month 3: Thank You for Joining Hand-Written Note
- Month 5: Check-In Postcard – We're Glad You're Here!