



New Member Onboarding, Engagement, and Renewal: *The Power of the First Year Experience*

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Why should we focus on new members?

Our Goal:

Provide an exceptional membership experience.

Our Strategy:

Create a personalized, localized, energized, and friction-free journey through the member lifecycle.

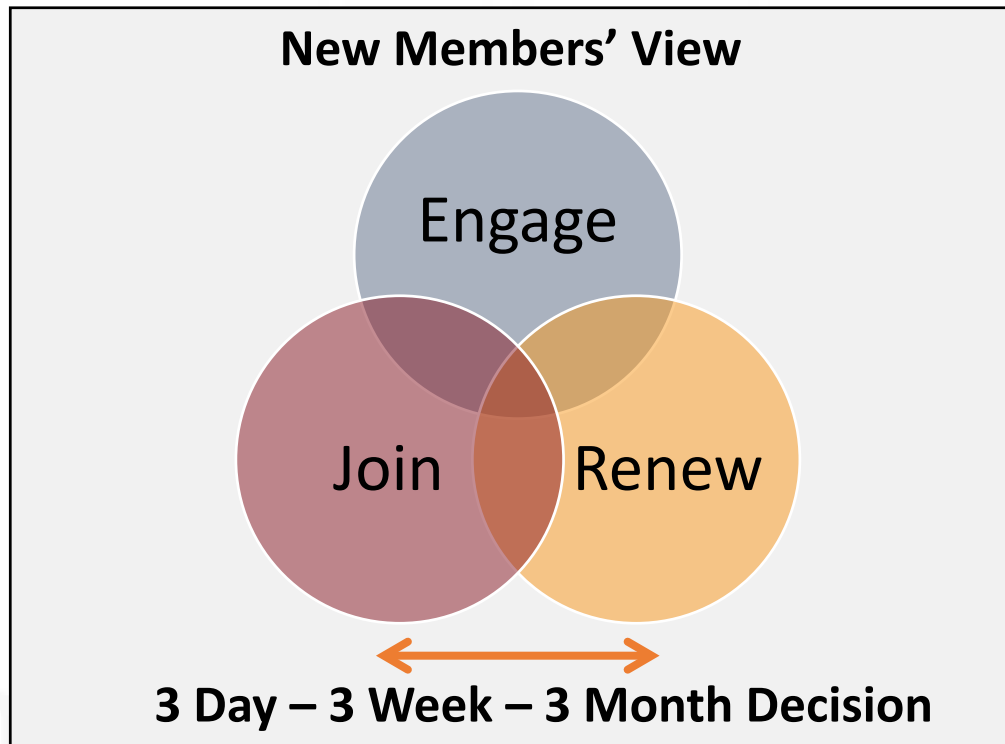
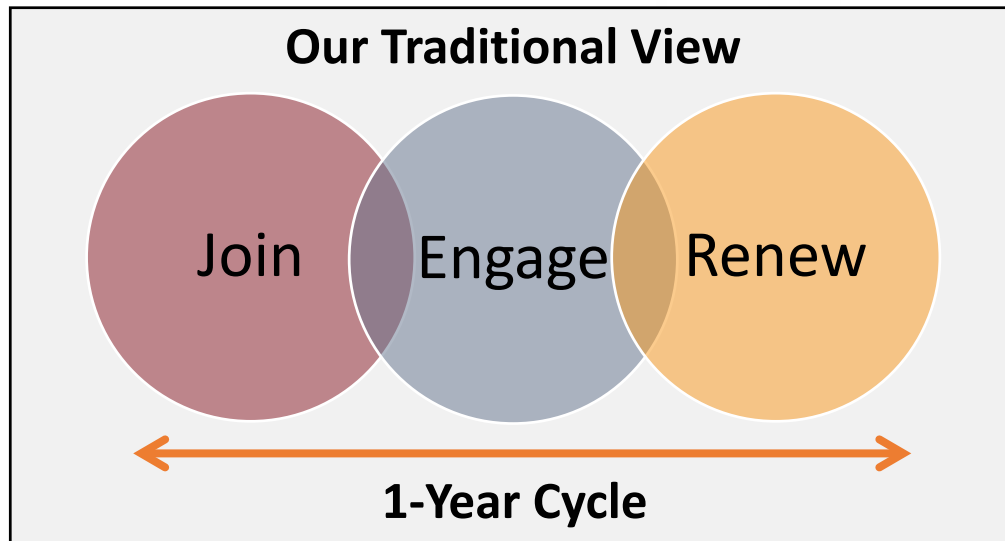
Our Tactic:

Maintain a holistic new membership experience from onboarding to renewal.

The Numbers:

- ✓ Industry benchmark for new member retention = 60+%
- ✓ Small improvements produced an 8% increase in FY16-17 = 49%
- ✓ Average increase in new member retention rate with welcome plan = ~10%+
- ✓ We are in reach with just some more focus and touch points!





Why are new members different?

3 Days – 3 Weeks – 3 Months New Member Milestones

- ❖ New member experience is interconnected
- ❖ The decision to renew is not caused by renewal notices and is made as early as 3 months
- ❖ By 3 Days: Welcome member and introduce them to benefits (*"We are aware you need solutions."*)
- ❖ By 3 Weeks: Get member to engage with a simple benefit/resource/event (*"We can provide you with a solution/knowledge."*)
- ❖ By 3 Months: Connect member with targeted benefit/resource/event (*"We understand you and want to empower you with this solution."*)

ARMA HQ New Member Lifecycle

- ❖ Comprehensive full-year communications cycle with multiple touchpoints
 - ✓ Goal = Full engagement by 90 days and continued relationship building through month 12
 - ✓ Shifting to a more progressive communication structure based on the 3 day-3 week-3 month new member engagement strategy
 - ✓ Diverse communication mediums: electronic, print, and personal; connection to events and mentorship
- ❖ Medium 1: Membership Journey Automated Email Campaign
 - ✓ Automated email campaign from Day 1 through Month 12
 - ✓ Total of 11 messages throughout the year identifying association trigger points (benefits/resources)
 - ✓ Journey theme appears throughout the content in a personalized tone to engage
- ❖ Medium 2: Journey Roadmap Welcome Packet
 - ✓ Physical mailing deployed in Week 2: Custom foldable roadmap with “directions” to benefits/resources
 - ✓ Includes information about ARMA and the profession
 - ✓ Complements content in email campaign and maintains journey-related theme

ARMA HQ New Member Lifecycle

❖ Medium 3: Personal Outreach

- ✓ New member welcome committee phone calls by volunteers on a weekly basis (~Week 2/3 of cycle)
- ✓ Hand-written Thank You notes for joining ARMA (sent in Month 3 of cycle)
- ✓ Check-in postcard to see how new members are doing (sent in Month 5 of cycle)
- ✓ Check-in phone call to discuss member experience/engagement (Month 8 of cycle)

❖ New Member Central at ARMA.org

- ✓ Special place online to help connect new members to benefits, education, and resources
- ✓ Video welcome by ARMA CEO and new look, content, and links to resources

❖ Phase 2: Future Additions

- ✓ Chapter Collaboration
- ✓ Invitation to events: Local chapters and ARMA Live! experience orientation and special events
- ✓ Chapter-wide coordination campaign to implement or align monthly renewal phone calls by chapter volunteers (Thanks to the chapters that already do this – it increases retention!)

Chapter Engagement and Collaboration

- ❖ Collaboration to include chapters in the HQ onboarding process
 - ✓ Goal = Fully connect new members with their local chapter and bring awareness to invaluable resources
 - ✓ Personal calls, outreach, and invitations to local chapter events to encourage assimilation into the chapter (or encourage membership if the new member did not join a chapter initially)
 - ✓ Coordinated plan that enhances existing chapter new member onboarding and engagement
- ❖ Create an ACTION PLAN for your Chapter Collaboration:
 - ✓ Use templates, samples, and guidance in this toolkit
 - ✓ Outline new member onboarding and engagement efforts with the board and review regularly
 - ✓ Use a new member roster list (available for chapter leaders to download at www.arma.org)
 - ✓ Check out our detailed action plan in this toolkit to get you started

Tools and Resources

- ❖ Dynamic Benchmarking New Member Engagement Study
 - ✓ <http://www.dynamicbenchmarking.com/new-member-engagement-study>
- ❖ ARMA HQ New Member Central
 - ✓ <https://www.arma.org/general/custom.asp?page=NewMemberWelcome>
- ❖ ARMA HQ New Member Welcome Committee Information
 - ✓ <http://www.arma.org/?page=WelcomeTeam>
- ❖ ARMA HQ Mentorship Program
 - ✓ <http://www.arma.org/?page=Mentorship>

New Member Communications Toolkit

A complete package of tools are available at Chapter Central and include:

- ❖ Best practices and HQ overview presentation
- ❖ New member communications cycle timeline
- ❖ Tips on creating content with email campaign notices
- ❖ PDF Sample of printed Roadmap to the Membership Journey (unfolded)
- ❖ Chapter Leader Action Plan



**An engaged member is a
RETAINED MEMBER!**

Questions or Comments?

