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!
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

- ARMA HQ New Member Central
  - [https://www.arma.org/general/custom.asp?page=NewMemberWelcome](https://www.arma.org/general/custom.asp?page=NewMemberWelcome)

- ARMA HQ New Member Welcome Committee Information
  - [http://www.arma.org/?page=WelcomeTeam](http://www.arma.org/?page=WelcomeTeam)

- ARMA HQ Mentorship Program
  - [http://www.arma.org/?page=Mentorship](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?