

Phases of New Member Onboarding

3-17-22

Client Roundtable



Phase 1: ASK - CAPTURE - ACT on their unique needs.

Interest and intent (what you want)	Ways to ask the question to be <i>member-centered</i>
Why did you join?/Why are you here?	“What’s your #1 goal this year?” “What are you hoping to get out of your membership this year?” “What’s most important to you right now?”
Who are you?	“How would you describe your professional peer group?” “How would you describe where you are in your career journey?”
How can we serve you best?	“Would you be interested in a welcome call?” “How do you prefer to hear about what’s happening in our community?” “Where do you get your industry news?”



Phase 2: Deepen the relationship and engagement.

Interest and intent (what you want)	Ways to ask the question to be <i>member-centered</i>
What topics/resources do you care about?	“What topic is of most interest to you?” “How do you prefer to learn?” “How do you like to network and connect with like-minded peers?”
What fee-based offerings or partner programs are relevant for you?	“What problem keeps you up at night?” “Are you interested in _____?” “Would you like to learn about _____?”
Do you want to get more involved?	“Are you interested in volunteering?” “Would you like to get involved in our mentorship program?” “Would you be interested in joining a new committee this year?”

Phase 3: Assess the relationship ahead of renewal.

Interest and intent (what you want)	Ways to ask the question to be <i>member-centered</i>
How well are we meeting your needs?	“What have you found most valuable so far?” “How well does our advocacy work reflect your views and opinions?” “What feedback do you have for our board or senior leaders?”
Is your profile up-to-date?	“Have your goals or needs changed over the last year?” “We have your current employer/title as _____. Do you have any updates to share?” “What’s a good alternative phone/email/ mailing address for you?”
Satisfaction - How likely are you to renew when the time comes?	“How likely would you be to recommend membership to a friend or colleague?” and “What can we do better?” [NPS] “How valuable has your membership been to your career or business this year?”