GrowthZone – 5 Ways to Connect with New Members using Marketing Automation

GrowthZone
smarter association software

Overview

One of the key goals of your association should be to providing relevant and personalized content in a timely basis to your new members.
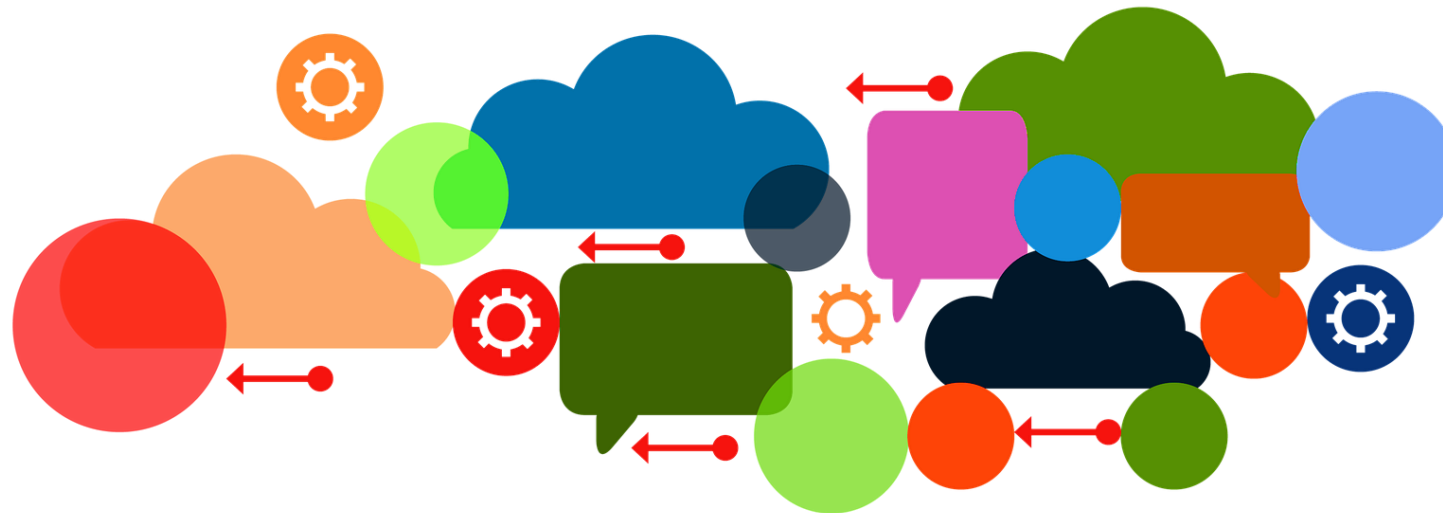
Overview

Onboarding:

A process through which new members move from being organizational outsiders to becoming organizational insiders.

With the Marketing Automation module, you can send personalized and targeted information to your new members around their initial experience and key milestones that will ensure a successful onboarding.

Agenda

Before You Start…

1.   Welcome and Engage
2.   The Right Message at the Right Time
3.   Be Logical
4.   Keep on Track
5.   Maintain Engagement

Before You Start...

DAY 1-7
- ☑ Send welcome email.
- ☑ Mail new member packet.
- ☑ Call the member to say "Welcome to the Association."

DAY 14-21
- ☑ Email instructions on how to access member benefits.
- ☑ Call with an event invitation.

DAY 45
- ☑ Make a check-in call / "Hello, how are things going?"
- ☑ Email a reminder of features available to members.

3 MONTHS
- ☑ Analyze how they are using their membership.
- ☑ Email a piece of useful content, an article, or a link to a popular page on your Association's website.

4 MONTHS
- ☑ Enter member into your Association's marketing funnel.
- ☑ Call with information about committees and events.

6 MONTHS
- ☑ Send membership check-in/survey.
- ☑ Email reminder of online community.

What's your plan for onboarding new members look like? Do you have one? Putting a plan in place is the first step toward a successful onboarding- and is crucial to member retention.
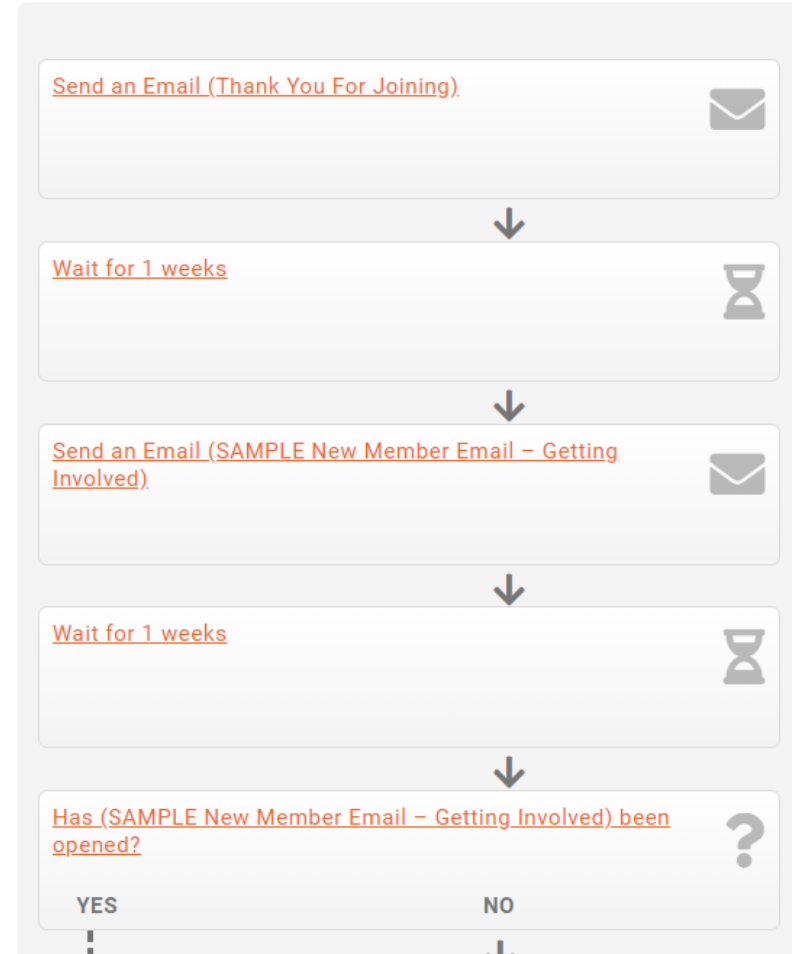
Any plan- even a simple one- is better than no plan.

GrowthZone New Member Onboarding Plan

Before You Start...

This plan will be the map for your "new member onboarding" workflow.

You can include non-email steps in your workflow such as phone calls and personal visits, and the system will create reminders to the staff assigned to those tasks!

WIKI: Definitions of Workflow Steps

Send an Email (Thank You For Joining) ✉

↓

Wait for 1 weeks ⏳

↓

Send an Email (SAMPLE New Member Email – Getting Involved) ✉

↓

Wait for 1 weeks ⏳

↓

Has (SAMPLE New Member Email – Getting Involved) been opened? ❓

| YES | NO |

Before You Start…

Now that you've planned what you want to share and when, create your content accordingly using all the GrowthZone tools at your disposal:

Email Templates/Merge Fields to personalize messaging

InfoHub to promote member community

Events to encourage involvement

Surveys to gather additional data and feedback*

Member App for additional engagement

*requires Forms/Surveys module

1. Welcome and Engage

Your new members are excited and motivated- make sure to leverage that energy right away! Make your welcome email informative and personal, and include instructions on how they can create their account and access their member benefits.

2. The Right Message at the Right Time

Many associations send a welcome email and then stop. Be sure to continue reaching out after the first 2 weeks!

Schedule your workflow to reach past 30 days, 60 days, 90 days- even all the way through their first full year of membership!

WIKI: Setup Your Workflow Automation Steps

3. Be Logical
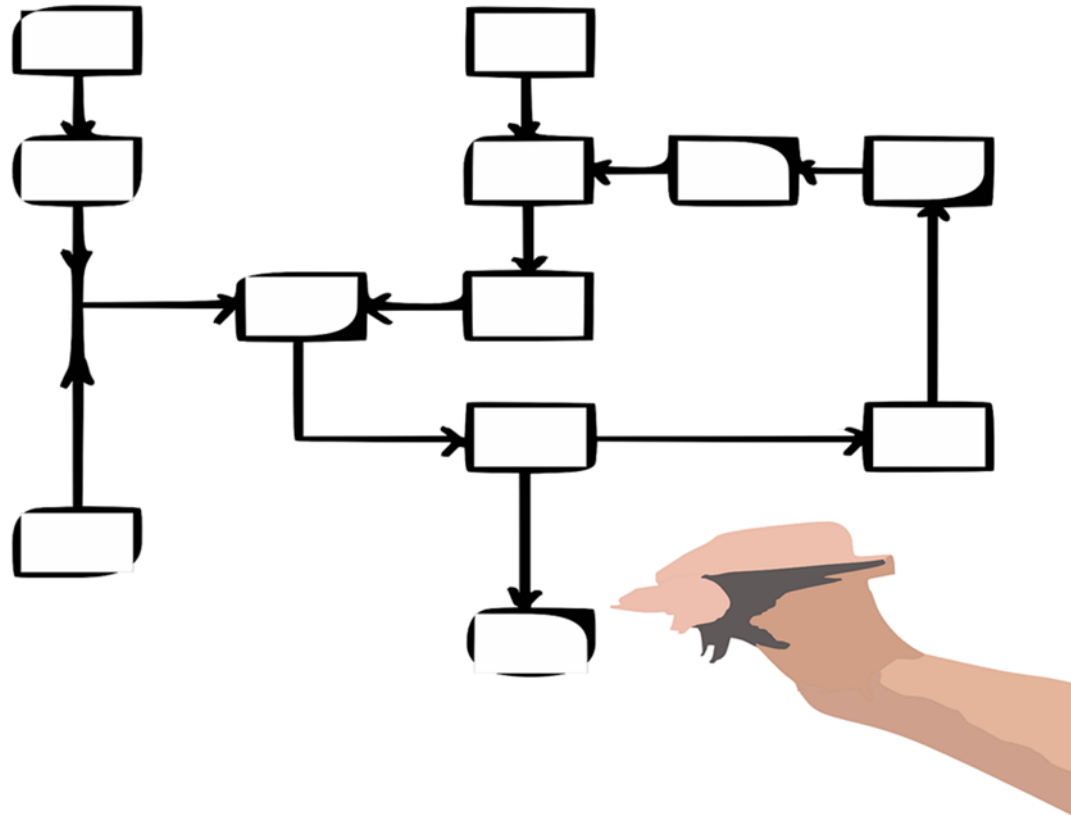
Make sure to build logic steps into your onboarding workflow, such as:
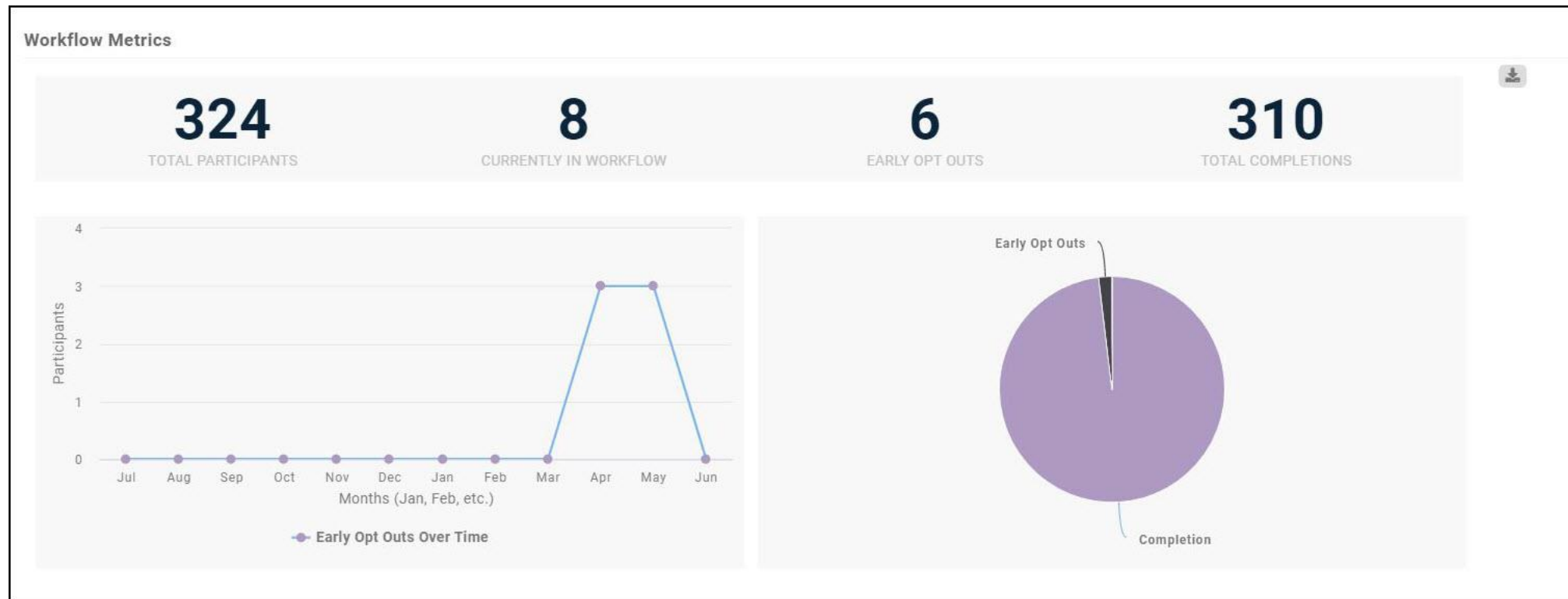
Did the recipient open the email?

- If so, proceed to the next step in the workflow.

- If not, what action do you want to perform?
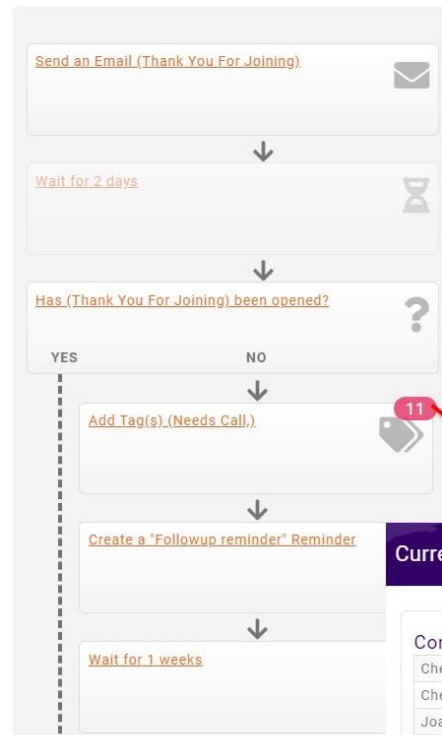
WIKI: Definitions of Workflow Steps

4. Keep on Track

On the General tab of your Marketing Automation module is an overview of your workflow metrics.

WIKI: Workflow Metrics

4. Keep on Track

You can track and see at a glance which of your new members is in which step of the workflow.

WIKI: Workflow Metrics

5. Maintain Engagement

New members will hopefully become renewing members- but they don't become any less important. Your onboarding cycle should continue for renewed members as well!

You can set a final step to add the contacts that have completed the workflow to a list, and then set that list up in a new workflow that continues the communication and engagement efforts into the second year of membership and beyond.

WIKI: Definitions of Workflow Steps

START HERE

RETENTION

AWARENESS

RECRUITMENT

ACQUISITION

ONBOARDING

A process through which new members move from being organizational outsiders to becoming organizational insiders.

ENGAGEMENT

RENEWAL

Final Thoughts...

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

Using the Marketing Automation module is an excellent way to automate time-consuming, repetitive, or delegation of tasks which if skipped or missed could result in new members not realizing the full benefits of their membership- and thus not renewing.

Member retention for the win!

Questions?

Resources

GrowthZone New Member Onboarding Plan

40 Specific Member Engagement Tactics Any Organization Can Use

Onboarding for Retention: How to Engage New Members for the Long Term