

Sample New Member Onboarding Plan/ Touchpoints

Time from Join Date	Action
Immediately	Transaction receipt – online joins only
2-3 weeks	Welcome letter and WEF brochure
1 month	Welcome email (includes a soft reminder about benefits and updating the member's profile)
2 months	Member benefits email – Educational opportunities/Professional development focus
3 months	New member short survey – “How are we doing?” (no more than 5 questions)
5 months	Member benefits email – WEF Publications and Resources focus
6 months	Invitation to join a committee/volunteer (Get Engaged!)
7 months	Member benefits email – WEF awards and recognition
8 months	Invitation to update membership profile and information
After (8) months, the sequence of renewal touches begins with early reminders and subsequent progressively staged reminders about membership renewal.	
9 months	Invitation to renew WEF membership early (incentive/premium offer extended for early renewal)
	Hard copy – 1 st mailed renewal notice
10 months	Thank you for being a WEF member email – reemphasize member benefits and/or highlight organizational accomplishments for the year
11 months	Happy WEF Anniversary email (soft renewal touch – focuses on reminding the member their WEF Anniversary is coming up)
12 months (30 days prior to expiration)	Hard copy – 2 nd mailed renewal notice

Last updated: 3.27.2017