





What Is Onboarding?

Why Is Onboarding Important
to Associations?



Onboarding – The process associations go through to welcome and integrate members into the organization.

Successful engagement begins with onboarding members.

Onboarding programs set the stage for successful renewals by helping members become **benefit users**.

Market tests have shown that members who have a **'non-dues' transaction** with their organization are far more likely to continue their membership [than those who do not].

An engagement series of **month-by-month** contacts with your members can increase retention rates substantially.

What are WEF's Onboarding Touchpoints?

- Welcome Email
- Mailed Welcome Kit
- New Member Welcome Call
- New Member Survey
- Invitation to Volunteer
- Email Engagement Series (to highlight benefits throughout the year)

How MAs Can Onboard:

- Welcome Email
- Welcome Call
- Invitation to Volunteer
- Email Engagement Series (to highlight local events and activities throughout the year)



Outlook's Mail Merge Wizard and/or other email services that allow you to **"automate" member messages** are huge time savers.



Enlist volunteers to help with outreach to new members. It's a wonderful way to engage more seasoned members and ensure your new members feel welcome.



Stay connected throughout the year. Use technology as a retention aid. Email, social media, your website; etc. are economical, efficient and modern ways to share information and updates of interest to your members.



Access the **templates in our MA Resource Center** to help you get started. Our team is also available to help with any questions.

Tools & Resources
Tools & Resources to help MAs create efficiencies in their business operations
[Learn More](#)

Video Content for MAs
All virtual recordings offered for MA Leaders are provided in this section
[Learn More](#)

MA Resource Sharing
Member Associations share a variety of resources on topics related to Awards, Board, Committees, Financial, Policies, Training and much more for MA Leaders to use
[Learn More](#)

MA Conferences
Planning for the WEF representative to attend a MA Conference
[Learn More](#)

Strategic Planning

Webinars for MAs

Resource Links

Pilot MA Grant Program

Privacy Policy

- [WEF-MA Strategic Planning Guide for Membership](#)
- [Membership Benefits Table](#)
- [Customizable Membership Brochure](#) - Use this to promote your local MA and WEF. Tailor the brochure to add information relevant to your local MA, upcoming event details, and membership details. Include your MA logo where instructed, add your MA's contact information and include photos of your MA members.
- [WEF - "Unlock the Power of WE" - Membership Benefits Flyer \(one-pager\)](#)
- [New Member Onboarding Plan](#)
- [New Member Welcome Email](#)
- [New Member Welcome Letter](#)
- [Stairsteps of Membership Engagement](#) - Understand the process for how members engage with your organization to help better move them up the engagement ladder.
- [Renewing Member Engagement Plan](#)
- [Membership Renewal Reminder](#)
- [Membership Renewal Phone Script](#) - Use this script as a guide when making follow up calls to members due for renewal and/or reinstatement.
- [WEF Membership Exit Survey](#) - Use these survey questions as a final touchpoint to gather useful data from lapsed members regarding why they have not renewed membership

Thank you for taking time to learn more about onboarding your members. If you have questions about membership recruitment and retention, we're always glad to help!

Questions?

Camille Sanders, CAE, PCM

Director, Membership

Office: 703.684.2419

Email: csanders@wef.org