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.
- 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 WEF" - 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?
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