

5 Ways to Connect with New Members using Marketing Automation

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.

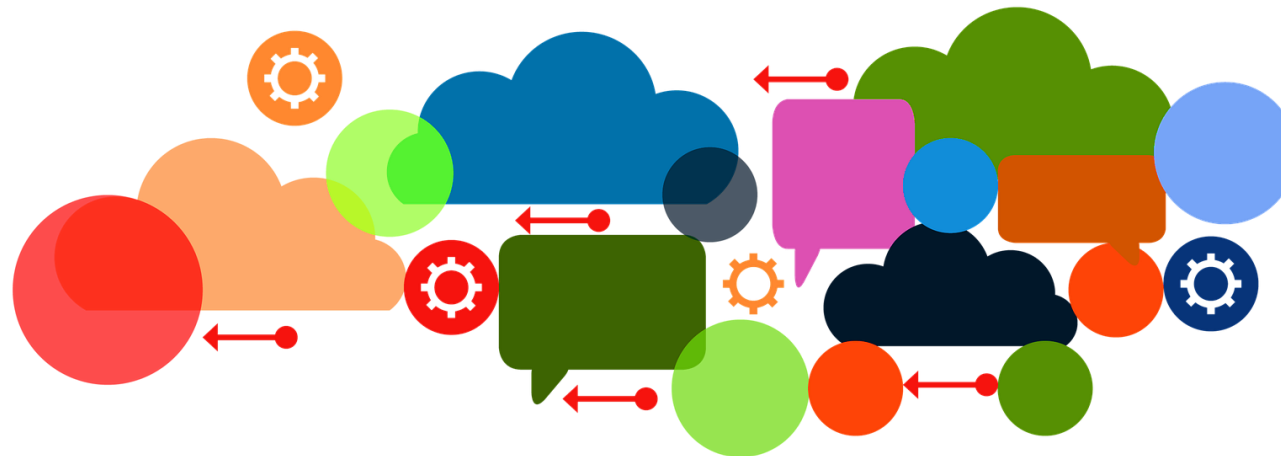
With the Marketing Automation module, you can send personalized and targeted information to your new members around their initial experience and key milestones that will ensure a successful onboarding.



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...



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.

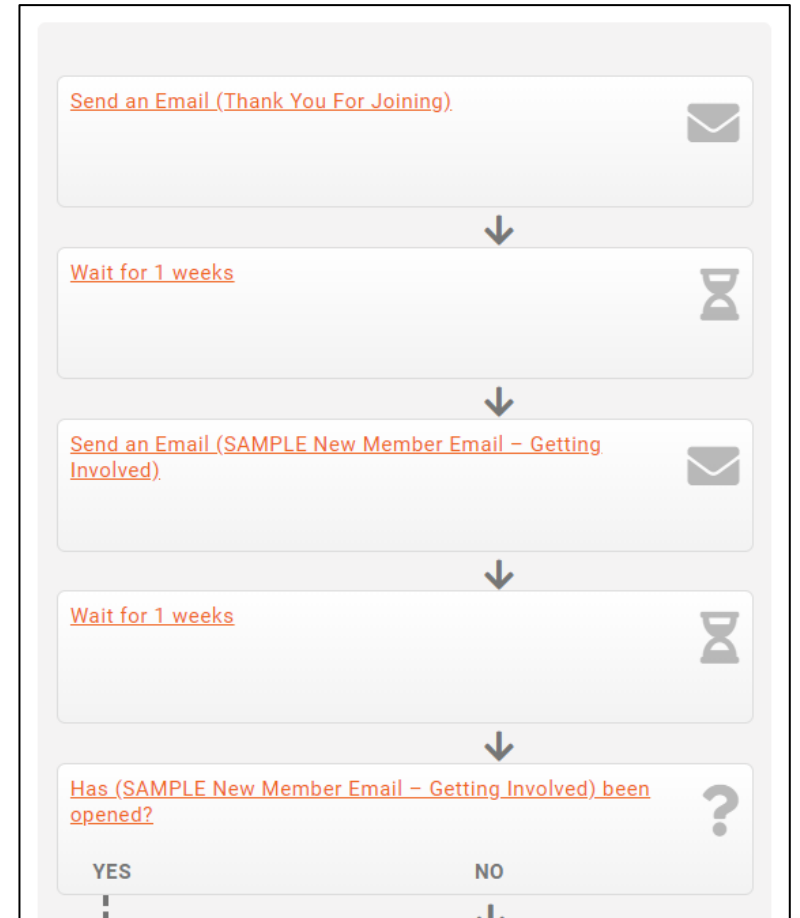
[GrowthZone New Member Onboarding Plan](#)

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!

Knowledge Base: [Definitions of Workflow Step Types](#)



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 and Merge Fields to personalize messaging

Info Hub to promote member community

Events to encourage involvement

Surveys to gather additional data and feedback*

MemberPlus 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

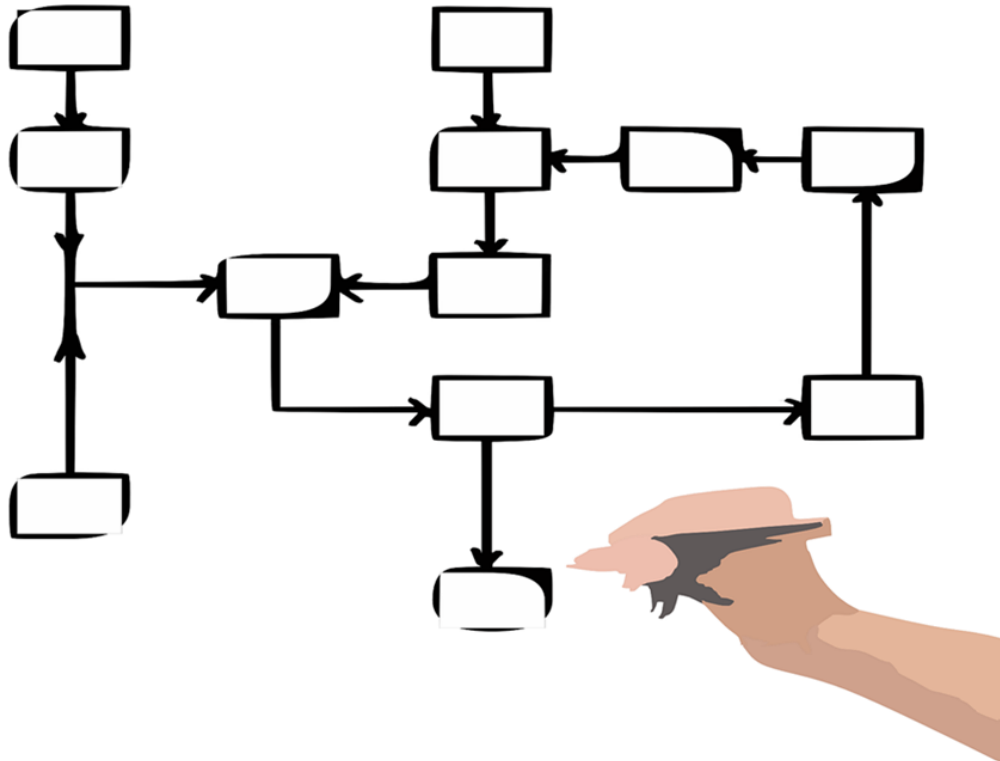


Many associations send a welcome email and then stop. Be sure to continue reaching out after the first 2 weeks!

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

Knowledge Base: [Add Steps to Your Workflow](#)

3. Be Logical



Make sure to build logic steps into your onboarding workflow, such as:

Did the recipient open the email?

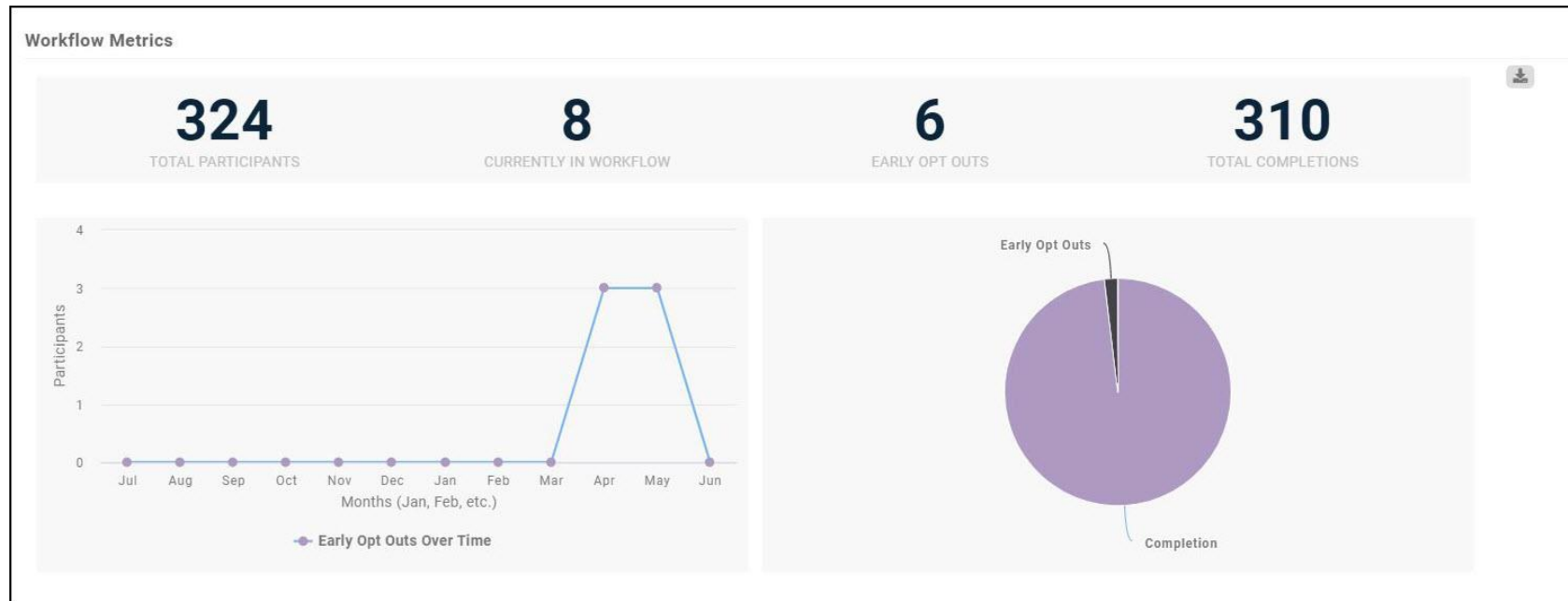
- If so, proceed to the next step in the workflow.
- If not, what action do you want to perform?

Knowledge Base: [Definitions of Workflow Step Types](#)

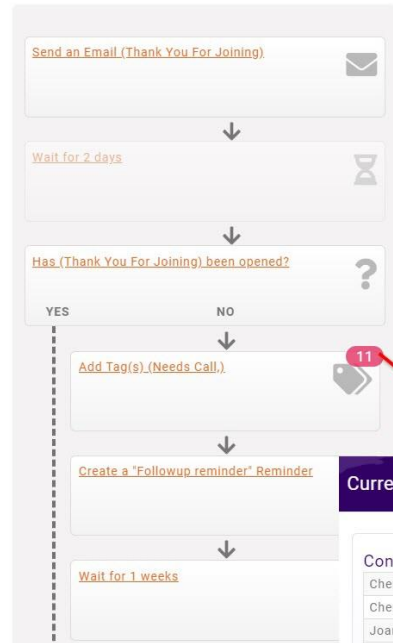
4. Keep on Track

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

Knowledge Base: [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.

Knowledge Base: [Workflow Metrics](#)

Currently Pending

Contacts	
Cheri Petterson	cheri.petterson@growthzone.com
Cheri Petterson	cheri.petterson@growthzone.com
Joan Anderson	joana@mailinator.com
Ursula Penny	ursula@mailinator.com
Greg Sean	sean@mailinator.com
Julie Jones	ravhel@mailinator.com
Hanhah Brown	lucas@mailinator.com
Randy Lange	pine@mailinator.com
Janna Lanne	Lanne@mailinator.com
Cheri Navin	cheri.navin@mailinator.com
Scarlett O'hara	scarlett@mailinator.com

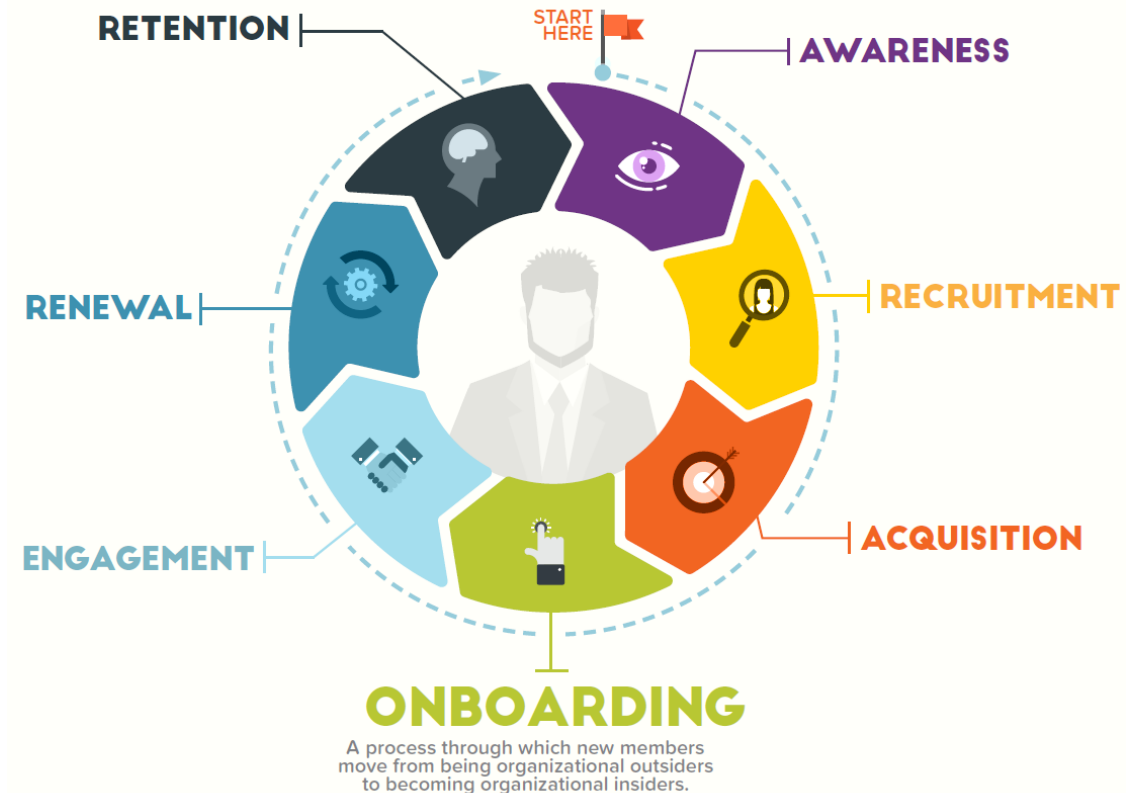
Close

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.

Knowledge Base: [Definitions of Workflow Step Types](#)



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?

Training and Support

Customer Service Hours:

Phone: 7 a.m. – 5 p.m. CT (Monday, Tuesday, Thursday, and Friday)

800.825.9171, Option 4, then Option 2

Chat: 7 a.m. – 6:45 p.m. CT (Monday, Tuesday, and Thursday)

7 a.m. – 4:45 p.m. CT (Friday)

Online Support Documentation: [GrowthZone Knowledge Base](#) »

Online Training Calendar: [Training Event Calendar](#) »

Live Chat: [GrowthZone Support Portal \(chat on far right\)](#) »