

Onboarding New Members

Presented by the Membership COI

January 16, 2020

Membership COI Contacts

National community of interest to support Posts and Membership POCs

- Cindy Lincicome, F.SAME, Chair
- Mike Huffstetler, Chair-elect
- Jill Murphy, Staff Liaison

In the beginning...

It's critical that new members are welcomed as soon as they join.

New members expect immediate acknowledgment they've joined.

- Develop a welcome email tailored to your Post including:
 - regular meeting information – time, date, location/address, special info
 - next special event - date/location, programming, registration, benefits
 - invitation to attend & get engaged – ask them to RSVP to you personally
 - link to the website and officer contact information, social media links
 - THANK THEM FOR JOINING!!
 - Subject line suggestion: Welcome to SAME XXX Post


In the beginning...

- Pull the new member roster
 - Find the roster in the Post Leader section of your Member Account
 - This roster updates daily and includes new members from the last 30 days
 - Best Practice: review the roster weekly and deploy welcome emails
 - At a minimum new member roster should be reviewed every 25 days

Please read the following guidelines before downloading.

- **Post Rosters are for SAME-business use ONLY. They are not to be distributed, sold or used in any way other than to communicate with Post members about Post business.**
- Depending on your browser, the download will ask if you wish to save or open. It is always better to save, then open.
- Rosters may download as .csv files, depending on your Browser. To open them in MS EXCEL, you need to make sure you are looking at All Files and not just .xls files.
- The Individual Member download will give you **all** the CURRENT, ACTIVE members - company and agency representatives **as well as** individual members. Students are not included in this list.
- There are now FOUR columns for join and term dates. The SAME_Join and SAME-Term columns are for the SAME membership. The Post_Join and Post_Term are for the Post membership.
- From now on, when a member joins a Post, the Post join date will be the date that they join the Post. And when a member leaves a Post, the Post term date will be the date that they leave the Post. We have not been able to track that in the past.
- The email list is to use for Post communications. Anyone who asked not to be contacted in accordance with GDPR is not on this list. This list was created to make emails easier for Post Leaders and RVPs.
- Questions? Comments? Suggestions? Need Help? Contact Natasha at nroch@same.org

Post Roster Downloads

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- [Full Member List](#)
 - [New Members List](#)
 - [Company and Agency List](#)
 - [Student Member List](#)
 - [Members who have left your Post](#)
 - [Members who have Dropped their SAME Membership](#)
 - **NEW!** [Full Member EMAIL ONLY List](#)**This list contains people who have agreed to receive Post-related email messages and complies with GDPR.

Welcome!

- Other welcome opportunities
 - Newsletters – have a section dedicated to welcoming all new Individual and Sustaining members
 - Website – very important to new Sustaining Members!
 - In person – especially if they RSVP they will be attending. Introduce them to other Post Leaders and members
 - Social Media – utilize for Sustaining Members

Get Them Engaged

- Follow up promptly on any questions
- Ask sustaining members to provide a logo and short blurb for the newsletter, social media and website
- Provide links to social media and ask them to follow, like and share
- Find out their interests and ask them to join a relevant committee or assist with an event
- Connect them with others in the Post who have similar interests

Other ideas from Posts:

- Special sticker for new member on badges at meetings/events
- New member orientations
- Invitation to “meet the board” before monthly meetings
- Membership handbook sent to new members
- Mail a welcome letter from the Post President

Post onboarding templates: <https://www.same.org/Document-Exchange?EntryId=2458>

Keys to Success with New Members

- Add new members to your email list immediately
 - Update the website regularly
 - Make them feel welcome
 - Engage them as soon as they join
- Remember retention starts the day someone joins!

Additional Membership Resources!

- Visit the Post Resource Center Document Exchange for ideas, templates and resources: <https://www.same.org/Document-Exchange>
 - Membership Recruitment
 - Member Engagement
 - Member Retention
 - Previous Membership COI webinars
 - Other membership resources (external)

Membership COI

Interested in Membership?

Join the Membership COI!

There are 3 subgroups focused on:

- Membership Strategy
- Tools & Resource Development
- Military Academies & Engineering Schoolhouses

Time Commitment:

- We hold quarterly calls
- In person meetings at JETC and SBC
- Sub-committees hold regular calls and work via email.

Login to your member account to add the Membership COI to your profile or email member@same.org

Questions?

Reach out anytime!

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