



elevating
engagement

WORKBOOK

New
Member
Edition

Amanda Lea Kaiser

Nice to Meet You!

Hello and welcome, my CEO (Chief Experience Officer) friends! Don't worry if that's not your actual title, because you can adopt this role no matter your title. Not to get too woo-woo, but Chief Experience Officer is also a state of mind. And there's nothing like concrete plans to get us into the perfect mindset.

If you're like me, you've found that it helps to write things down. Ideas written down can be prioritized, shuffled, ranked, and improved. Listing thoughts, organizing them, reverse engineering solutions, and uncovering the best tiny bits to test gives us tangible, bite-sized ways to start creating member experiences immediately.

That's why I've written this companion to *Elevating Engagement: Uncommon Strategies for Creating a Thriving Member Community* (chapters 1 and 2) for you! It's a step-by-step, question-by-question walk through our new members' first experiences. Read the prompts, put yourself in your members' shoes, and ponder the answers unique to your association and your special members. As you answer these questions, you might find that you are forming the building blocks for your new member onboarding plan.

As I said in *Elevating Engagement*, "Member experience experiments can be as small or as big as you wish, depending on your capacity. As slow or as fast too. One person can effectively use these strategies, or you can roll them out to teams or the whole association." Feel free to make this your own personal journal or give copies to everyone on your staff, department, committee, or board. Work through the questions yourself or tackle a few prompts as a group during meetings. There's no wrong way to journal your curiosity about how to improve your members' experiences.

Grab your favorite pen, and let's GO!



LET'S START WITH THE END IN MIND

How would you like your new members to feel?

Feel free to list as many emotions as you would like. When I lead Member Engagement Labs, participants answer the below questions with words and phrases like *welcomed*, *connected*, *invested*, *safe*, or even *a sense of belonging*.

How would you like each new member to feel when they join?

1.

2.

3.

How about at the nine-month mark?

1.

2.

3.

After two years?

1.

2.

3.

Use these feelings to inspire the experiences you create for your members as they travel on their member journey.

TAKE A WALK IN YOUR MEMBERS' SHOES

When we slide on our members' shoes (metaphorically) and slip on their glasses to look at the world through their eyes, we will get a sense of what topics, solutions, or support they need.

Is there a milestone moment that prompts new members to join? Example: *For individual members, it could be a career shift like graduating from university. For organizational members, it may be that they've reached a revenue milestone and now need what your association provides.*

Are there demographic features that are common among your new members?

Are there psychographic characteristics that are common among your new members? (Psychographics are similarities people may have in mindset, attitudes, or hopes.)

What are the critical problems new members tend to have when they join your association?

How do those problems make them feel?

The answers in the following table may give you a sense of what topics to focus on in your new member communications. Don't forget to empathize with how your members feel as a result of these problems. I've given you an example in the first row.



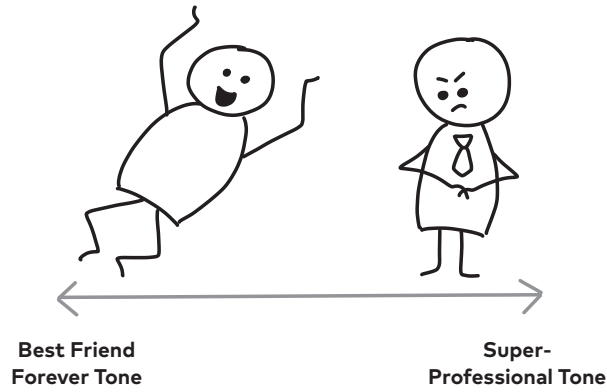


What are their critical problems?	How are those problems making them feel? 🙄 😡 😟	What resources, benefits, or content will help solve each critical problem or support members with their feelings?
<p>Example:</p> <p><i>Their organization must abide by government regulations for the first time. These regulations are challenging to interpret and expensive to implement.</i></p>	<p>Example:</p> <p><i>Nervous! They are worried about the potential consequences of not interpreting or complying correctly. They also feel alone. No one else in the organization does this work or has this responsibility.</i></p>	<p>Example:</p> <ul style="list-style-type: none">• <i>New member spotlights that discuss interpreting government regulations as the reason to join</i>• <i>The government regulation webinar series</i>• <i>Our coaching service</i>
1.		
2.		
3.		
4.		
5.		



ENSURE NEW MEMBERS GET LOTS OF HAPPY HELLOS

Since we're talking about communications, let's talk about happy hellos. One way to convey to members that the community they just joined is generous, friendly, and helpful is to warm up your messaging tone. You can plot every association's voice, messaging style, or tone on a continuum.



Best Friend Forever Tone	Super-Professional Tone
<ul style="list-style-type: none"> • Friendly 	<ul style="list-style-type: none"> • Polished
<ul style="list-style-type: none"> • Warm 	<ul style="list-style-type: none"> • Stuffy
<ul style="list-style-type: none"> • Casual 	<ul style="list-style-type: none"> • Grammatically correct
<ul style="list-style-type: none"> • Encouraging 	<ul style="list-style-type: none"> • Uses big words
<ul style="list-style-type: none"> • Used by many consumer companies, from JetBlue to Netflix 	<ul style="list-style-type: none"> • Recognized as corporate /institutional speak

Where do you think your association's messaging currently sits on this continuum? Mark this on the graphic below.



Sometimes warming up the tone for new members can send positive culture cues that make them feel more welcome. You probably don't want to swing from one side of the continuum to the other, but if you warmed up the tone for new members just a bit, where would you like to be on this continuum? Mark this on the graphic below.



The next time you write a new member message, imagine you're writing to a friend. When I do this, I find that the tone of my writing shifts from super stiff to a bit more casual, and I have a hunch that it's more fun to read! 😊

EXPLAIN YOUR JARGON

Do you think new members know your industry's or profession's jargon, #InsiderWords? When first-timers are faced with words or phrases they don't know, they might feel unsure, embarrassed, or frustrated—the opposite of what we hope our new members feel as they explore the association.

It's a good idea to also be mindful of more general exclusive language that could alienate new members. For example, the term *winter holidays* in a global association leaves out a whole hemisphere of members.

Try to use inclusive language and explain as much jargon as you can. Your new members will love having the inside scoop and feeling like they're part of the community!



Jargon/exclusive language	Where is it commonly used?	How/when can you explain the jargon or eliminate excluding language?
Example: <i>Winter holidays</i>	Example: <i>Messaging about main office closures.</i>	Example: <i>Replace winter holidays with December break.</i>
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		

HARNESS THE POWER OF FIRSTS

First impressions are super powerful and are the first indicators to new members that the association might be worth engaging with. Let's explore how to flip each transaction into a positive experience.

List three of the most common first transactions a member might have with your association.	What elements of this transaction might lead to a negative first impression?	Imagine options to eliminate the negative elements by creating a positive experience instead.
<p>Example: <i>Email receipt for new membership.</i></p>	<p>Examples: <i>The email auto-sends from the AMS, so it's ugly and doesn't have the branding of our other emails.</i></p> <p><i>It's unnecessary. If someone wanted the receipt, they could download it from their member portal.</i></p> <p><i>This email sends from a generic address, not a staff address like the rest of our email.</i></p>	<p>Examples: ✓ <i>Let's get this email in our branding template.</i></p> <p>✓ <i>Maybe we could go one step further and embed the one-minute welcome message from our CEO and have the email come from the CEO's email address.</i></p> <p>✓ <i>Or could we stop the auto-send entirely and put a line in our welcome email explaining that the receipt is available in their member portal?</i></p>

OFFER WARM WELCOMES



Many warm welcomes are better than none. Write down as many virtual, in-person, live, and asynchronous points at which we can warmly welcome members. **Example:** *When attendees log in to our monthly virtual onboarding event, we can welcome them by name in the chat.*

-
-
-
-
-
-
-
-
-

List the people, groups, or teams who might be willing to help you welcome new members.

-
-
-
-
-

CULTIVATE A GREAT CULTURE TO INSPIRE ENGAGEMENT

Are there negative culture cues that new members might perceive, and where might they pick up on these negative cues?

Example: *perceived cliquishness among some chapter boards.*

Let's say that every new member who joined immediately became highly engaged. What kind of environment/culture/ethos would need to be in place for that to happen?

Example: *warm, generous, open, and welcoming.*

What behaviors will help you avoid negative culture cues and create the positive culture/environment/ethos we aspire to above? **Example:** *a few board members volunteer to stay by the registration table and personally welcome new members to each chapter meeting.*

How can you help new members see others like them early in their membership journey? **Example:** a photo collage of young professional members on the homepage.

What are some ways you could help cultivate a sense of belonging? **Example:** Volunteer welcoming could find out what a new member's professional goals or challenges are and introduce them to another similar attendee.

GET READY FOR ACTION!

Skim back through all your great ideas on the preceding pages and select five ideas that you think will be fun to do, have an impact, and be achievable (not too time consuming, expensive, risky, or complicated).

List your five ideas here:

1.

2.

3.

4.

5.



Culture cues are in action whether we intend them to be or not. When we actively plan the culture cues we want to send, we signal to members that this is a community of their peeps.



Review your Get Ready for Action list of ideas on the previous page. Which one of your fabulous ideas is easiest?



Circle it.

Underline it.

Star it.

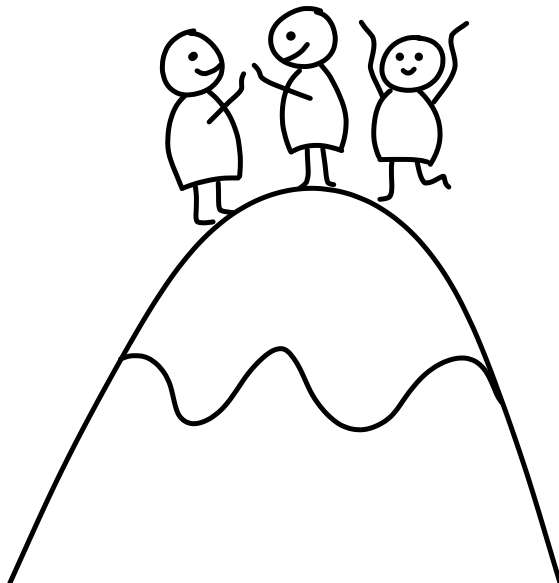


START IT!

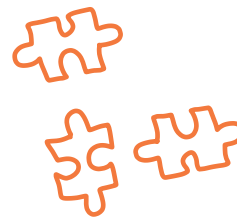
Once you've tried your first idea, come back to this list and the workbook any time for inspiration and a new idea to try.

You are well on your way to creating meaningful experiences for your new members!

You go, CEO!



NOTES & RANDOM IDEAS



- Lots of happy hellos
- Notice culture cues

NOTES & RANDOM IDEAS



FIND MORE MEMBER ENGAGEMENT IDEAS

Are you looking for even more ideas? Check out the book that started it all, [*Elevating Engagement*](#). Also, sign up for the [*Elevating Engagement newsletter*](#) to get weekly engagement tips, resources, and inspiration.

BOOK AMANDA

Share these ideas with your staff, affiliate leaders, chapter volunteers, and association professionals. Check out the [*Elevating Engagement keynote*](#) and [*Innovation Labs*](#).



Photo: Marco Calderon

about the author

Amanda Lea Kaiser, MBA, is a member engagement specialist, in-demand professional speaker, and author of *Elevating Engagement*. As a researcher, speaker, and cocreator of the Incubator Series and the New Member Engagement Study, she is at the forefront of exploring how member and attendee engagement is rapidly changing within professional communities.

Credits:

Written by Amanda Lea Kaiser

Designed by Shelley Makarski

Copyediting & Proofreading by Melissa Kawaguchi

Illustrations by Amanda Lea Kaiser

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* What first impressions can we improve???

* Photo collage members