



Sample Onboarding Email Sequence

Whether configured directly in your CRM database or in a third-party email service provider, automated messages are an integral part of the customer/member/donor experience. These messages are set up in advance and are sent when triggered by a specific action (purchase/join/donation). Even basic CRM systems offer the ability to customize a “receipt” or thank you message. Very sophisticated systems will allow you to send multiple messages to each member based on their actions, the lifecycle of an event or membership, response to a marketing or recruitment campaign, and other specific criteria that you set in advance.

Every communication, automated or not, should match your organization’s personality, voice, and ethos. Language and styles that are not consistent with your brand will confuse your audience, hinder engagement, and members may suspect that errant messages are spam.

Below are examples for an easy-to-follow email sequence for new members (some alternative style choices are shown). Make this sequence your own by identifying the most important aspects of your organization and replacing the fictional association info with your own. This simple onboarding strategy will help new members engage quickly and affirm their decision to join you; leading to higher renewal rates in the future.

New Member Sample Sequence Schedule

- Email #1 - Payment Receipt - **Immediate**
 - Email #2 - Welcome Message - **Immediate**
 - Email #3 - Deeper Dive - **Day 2- 7**
 - Email #4 - Special Invitation - **Day 8-14** (Optional - Variable, Not Automated)
 - Email #5 - Main Benefit Highlight #1 - **Day 8-14**
 - Email #6 - Main Benefit Highlight #2 - **Day 15-21**
 - Email #7 - Main Benefit Highlight #3 - **Day 22-28**
 - Email #8 - New Member 30-Day Survey - **Day 29-35**
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Swipeable Sample Copy

Email #1 - Payment Receipt

Dear [Name],
Congratulations - you're in!
Your membership payment has been accepted: [payment details]
Please save this receipt for your records.
Shortly, you will receive a welcome message with further details about your membership.
Please make sure that membership@essentialassociation.org is added to your contact list - or check your spam folder.
Welcome Aboard!
Emily Jacobs, Membership Director

Email #2 - Welcome Message

Example A:

Subject: Welcome: Important Information about your new TEA Membership

Preview Text: Save this Message

Body:

Dear Name,
Thank you for joining The Essential Association - North America's leading association for professionals like you. We know you'll enjoy the support, resources, and camaraderie we share here at TEA. There are so many ways to engage with TEA members and become an active part of our community. To jumpstart your membership experience, take these quick actions today:

- Update your member profile (link to log-in page)
- Opt-in to TEA Time, our online community here (link) and upload your photo.
- Check out the TEA calendar of essential events - and register for one near you!
- Meet your local TEA group (link to group/chapter/guild page link list)



Need help? Take a look at our list of FAQs here ([link](#)) or send us a message at Support@EssentialAssociation.com. During operating hours, you can chat with our team using the chat feature on our website ([link](#)) or by calling the office at (XXX) XXX-XXXX.

We're looking forward to getting to know you!
Emily Jacobs, Membership Director

Example B:

Subject: I'm So Excited to Welcome You, Name. (Alt: It's My Pleasure to Welcome You, Name)
(Alt: This is Going to Be Good, Name. I Can Feel It.)

Preview Text: A Personal Message from Margot James, Executive Director

Body:

[Insert a welcome video message (2 min or less) from the CEO or Executive Director that is member centered and describes briefly what's in it for them or what type of experience they can expect. Use this video to make a meaningful connection and a warm first impression. Do not use this time to talk about the organization's awards, prestige, influence, etc or the leader's background, accomplishments, etc. Focus on ways the organization serves its members/community in personal terms with which the new member can relate.]

You can jumpstart your membership experience by taking these quick actions today:

- Update your member profile ([link to log-in page](#))
- Opt-in to TEATime, our online community here ([link](#)) and upload your photo.
- Check out the TEA calendar of essential events - and register for one near you!
- Meet your local TEA group ([link to group/chapter/guild page link list](#))

If you need help navigating our website or have questions about your benefits, please check out our FAQ page. Our talented team is available to help you by email or phone 9-5 EST Monday through Friday. And, I invite you to contact me directly at margot@essentialassociation.com if you have feedback, comments, questions or concerns - anytime.

Yours Truly,
Margot James, Executive Director



Email #3 - Deeper Dive

Depending on the sophistication of your software, you may be able to customize these messages to highlight topics that match the interests or other demographic info in your members' profiles. If that's not possible, create generic messages that cover the most popular features for all member types or consider listing out highlights for multiple member types and adding a clickable list at the top that jumps to anchored text in the email body. Although this email is a more thorough description of highlighted topics, it must be as concise as possible. If you have trouble with brevity, make liberal use of bullets and links.

Subject: Is It Everything You Dreamed It Would Be?

Preview Text: Our Top Membership Features, Explained

Dear Name,

We hope you're enjoying your membership with The Essential Association so far. If you've been exploring our website over the past couple of weeks, you know there's a lot of ground to cover. Here's a list of highlights we don't want you to miss:

Your Profile/Account/Record Section - This section is where your personal information, financial transactions, and preferences are stored. You must log in to access this area. It's important to keep your profile information accurate because it's how we stay in touch with you and how fellow members connect with you. Your basic information is included in the searchable member database unless you opt out. There are opportunities to upgrade your profile to include your photo, logo, and other important business information for a small annual fee (payable upon each renewal).

Programs - Under the PROGRAMS tab on the TEA homepage, you'll find a list of ongoing service projects and events. Every TEA program is open to all members in good standing. To register or apply for a program...

[Insert 2-3 additional "deep dive" paragraphs on the main aspects of your website/organization/happenings.]



As always, we welcome your questions and are eager to help you make the most of your membership. Please contact our member services lead, Arturo Vista at XXX-XXX-XXXX for assistance during regular business hours.

Sincerely,

Email #4 - Special Invitation - Optional

This message may or may not be automated. It could be an invitation to a New Member Meet & Greet, an exclusive discount or access to something, an invitation to participate in new-member programming, etc.

If your membership is rolling, it may only be possible to automate an invitation to a live event if your software allows dynamic customizable content that can sync with an event calendar OR the invitation can be general and include a link to view a live event calendar.

An opportunity to connect in person at a live event or to participate in a special program is critical within the first 30 days of membership.

Emails #5-7 - Main Benefit Highlights Series

Subject: How Does it Feel to Have Access to the Industry's Best Dental Insurance, Name?

Preview Text: TEA Member Benefits You Can Use Today

Dear Name,

That's right - as a member of TEA, you're eligible for the Super Extra Fine dental plan - voted best in the industry! In fact, seventeen of our members were able to get affordable orthodontic treatment for their family members through the Super Extra Fine plan - a service they couldn't have gotten anywhere else! Click here to learn more about this incredible benefit.



[Insert 1-2 other benefits and their descriptions in each of the Benefit Highlight emails. Include details or specific examples of members using their benefits that will illustrate the value of each one. Even if a member never chooses to use the benefits you offer, they will perceive a value in knowing that the benefits are available.]

In the coming weeks you'll receive additional messages that highlight more of our most popular benefits. Until then, you can review our complete list here (link to member benefits page on your website) or call us anytime for assistance XXX-XXX-XXXX.

Sincerely,

Email #8 - New Member Survey

Send your new member a survey to track their engagement throughout the first 30 days. Determine specific benchmarks that you wish to measure, such as: did they opt-in/post to your online community? Did they attend an in-person event? Were they contacted by an ambassador/leader/mentor, etc? Keep the survey short but be sure to include questions about any metrics that will help you learn more about the success of your new member onboarding processes over time. (The goal is to be able to collect and analyze behavior and respond to trends. Example: 90% of TEA members who attend a live event in their first 30 days renew their membership - therefore the organization puts great emphasis on driving this behavior through additional marketing and incentives to attend events).

Consider offering a reward or incentive for completing the short survey. (Drawings or chances to win are not compelling enough, offer a "sure thing" as a reward - even if it is small.)