

New Member Journey

First year of membership

Week One

- New Member Setup (Membership Team)
 - Add “New Member Journey” Template in GrowthZone
 - Activate membership and setup billing
 - Confirm directory listing is active
 - Set primary rep and user settings
- Send “Your New Member Journey Starts Here” email to the new member. Personalize as appropriate (Membership Team)
 - Add Member to Automated New Member Journey Group
- Membership Team send email to staff that includes details about the new member (Membership Team).
- If member joined without any prior meeting with Chamber Staff, the Membership Team calls to set up Discovery Meeting (Membership Team)
- New Member’s social media pages (Facebook, LinkedIn, and Instagram) are followed by the Chamber Account (Marketing Team)
- Chamber Team connects with the primary and billing reps on LinkedIn with a welcome message
- Automated Email #1 “Welcome to the West Coast Chamber” is sent from Jodi (6 days after added to Automated New Member Journey Group)

Month One

- Membership Team has had a Discovery Meeting in-person, virtually, or over the phone (Membership Team)
- New member is scheduled to be welcomed on Facebook and LinkedIn (Marketing Team)
- 2-3-week new member personalized follow-up email including a program or benefit has been sent (Membership Team)
- Automated Journey Email #2 “Your Chamber Resource Guide: Maximize Your Membership” is sent from Chamber Team (25 days after Email #1)

Month Two and Three

- New Member is welcomed in *The West Coast Way* Magazine (Marketing Team)
 - Link to the magazine new member page is emailed to the member to say welcome (Membership Team)
- The new member list is shared at the Monthly Ambassador Meeting (Membership Team)
- Automated Journey Email #3 “Your Chamber Resource Guide: Support Local” is sent from Chamber Team (40 days after Email #2)

Month Four and Five

- New member attends Maximize your Membership (Membership Team)

- “Your West Coast Chamber Ambassador” email is sent to connect the New Member to their Ambassador (Membership Team)
 - Ambassador records feedback from phone call/visit in Box and Chamber staff reviews and records notes in GrowthZone (Membership Team)
 - Any action items resulting from Ambassador’s phone call are delegated and handled (Membership Team)
- Automated Journey Email #4 “Your Chamber Resource Guide: Exclusive Member Savings” is sent from Chamber Team (80 days after Email #3)
- Automated Journey Email #5 “Your Chamber Resource Guide: Get Connected” is sent from Chamber Team (80 days after Email #4)
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Month Six

- Personalized 6-month outreach (Membership Team)

Month Nine

- Membership team evaluates engagement and takes action if needed
- Automated New Member Journey Email #6 “Your Chamber Resource Guide: Invest in Your Community” is sent from Chamber Team (45 days after Email #5)

Month Eleven

- Automated New Member Journey Email #7 “Celebrating One Year” is sent from Chamber Team (45 days after Email #6)
- Renewal notice sent with invoice via email (Accounting/Operations)