

A RESEARCH REPORT FROM



# NEW MEMBER ENGAGEMENT STUDY

# Hello!

**Perhaps you remember** our inaugural 2018 New Member Engagement Study? If not, or if you would like a refresher, let me explain... no, there is too much. Let me sum up. *Fellow **The Princess Bride** fans, that one is for you.*

Four years ago, the great folks at Dynamic Benchmarking and I suspected that the secret sauce for engaging members was to engage them as early as possible. All indicators said when you engage new members early, you engage them for life. Enthusiastically engaged new members go on to become participants, then contributors, and volunteers. These super-engaged members buy, attend, speak, write, advocate, and get certified. They even go out and get more new members for you. The bottom line is new member engagement is paramount.

**But new members are at a much higher risk of not engaging. New members are 13% less likely to renew than existing members.**

So, how do you engage new members? This is the burning question that led us to wonder if new member onboarding programs really worked. The good news is a hearty and unequivocal YES! They work! New member orientation, welcoming, and onboarding programs work for all types, sizes, and reaches of associations.



**Amanda Kaiser**

As Winter, in the northern hemisphere thawed into early Spring, people started reaching out to us to say,

## “ Hey, when are you going to field the New Member Engagement Study again? ”

Well, we are glad you asked because a new question was percolating in our brains. In the intervening four years, we wondered how the pandemic and technology changed associations' ability to engage new members. We also wondered how dynamics like size and type of association impact new member engagement. Now, we have piles of answers!

Thanks to the help from 307 association leaders during Spring 2022, we have an extensive, rich data set which enables us to slice and dice even more finely. The New Member Engagement Study, Volume 2, has more insights for you, whether you are a volunteer leader or leading a 50+ staff team for a global association.

Industry research is a collaborative endeavor, so we want to give credit where credit is due. We could not have fielded this study without the respondents who generously took the survey - you are the very best! Thank you to everyone who answered my calls and shared the new strategies they are experimenting with on the [ASAE Collaborate](#), [Community by Association](#), [Answers for Associations](#), and [Association Chat](#) forums. Many thanks to our supporters who emailed, posted, and wrote articles to promote the survey.

We very much want to thank our partner sponsors at [Matchbox Virtual Media](#) and [PropFuel](#), who are experimenting right alongside us to bring oodles of new member insights to the association community.

Finally, I'd love to publicly thank the team at [Dynamic Benchmarking](#), who have been my amazing partners on this project for the last four years. Each research project is kind of like having a baby (but without all the mashed peas, questionable smells, and drool). Through question after carefully conceived question, countless drafts, and meeting after meeting to get everything perfect, I'm so grateful to be working with Maria and her team. Oh boy, I'm feeling the happy sniffles coming on.

This introduction is not the Academy Awards, so let's dive in and discover the new news in new member engagement!

We hope you love this study!



Amanda Lea Kaiser  
[Kaiser Insights LLC](#)



Maria McDonald  
[Dynamic Benchmarking](#)

**Matchbox Virtual Media and PropFuel proudly sponsor the  
New Member Engagement Study!**



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# The Quickest Ever Executive Summary

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The most important thing you need to know is new member onboarding, orientation, and welcoming plans are effective! If you don't have a new member engagement plan, you should start one, and you've come to the right place because you will find out exactly how to do that in this report. If you have a plan that isn't working as well as you think it should, you have also come to the right place because we will show you how to improve it. Or maybe you just want to stay on top of the latest and greatest trends for your super successful onboarding program? You, too, have come to the right place because we're a-trendspotting for you!

There are a few, shall we call them pillars, that we discovered during the first study that support the most successful new member engagement plans.



## The 3 Pillars of Successful New Member Engagement Plans

- 1 Revise often** - schedule frequent revisions to keep your content fresh.
- 2 Start slow** - expect your program to become more effective as it ages.
- 3 Use 3-5 tactics** - start by emailing new members and, over time, add more tactics to your plan; eventually, use a handful of tactics overall.

The abovementioned pillars were true four years ago and still hold true now. However, not everything has stayed the same. We are excited to report that member engagement plans are evolving!

# Keep An Eye Out for These New Insights

- 1** Programs are emphasizing ever more personal, concierge-like services.
- 2** There is a noticeable trend away from analog and toward digital tactics.
- 3** One size does not fit all! Small associations won't be able to implement a large association plan, but that's okay, you do you, and we'll show you how.

In a moment, we will open the doors and invite you into the New Member Engagement Data Vault.

**Are you Ready? Let's Go!!!**

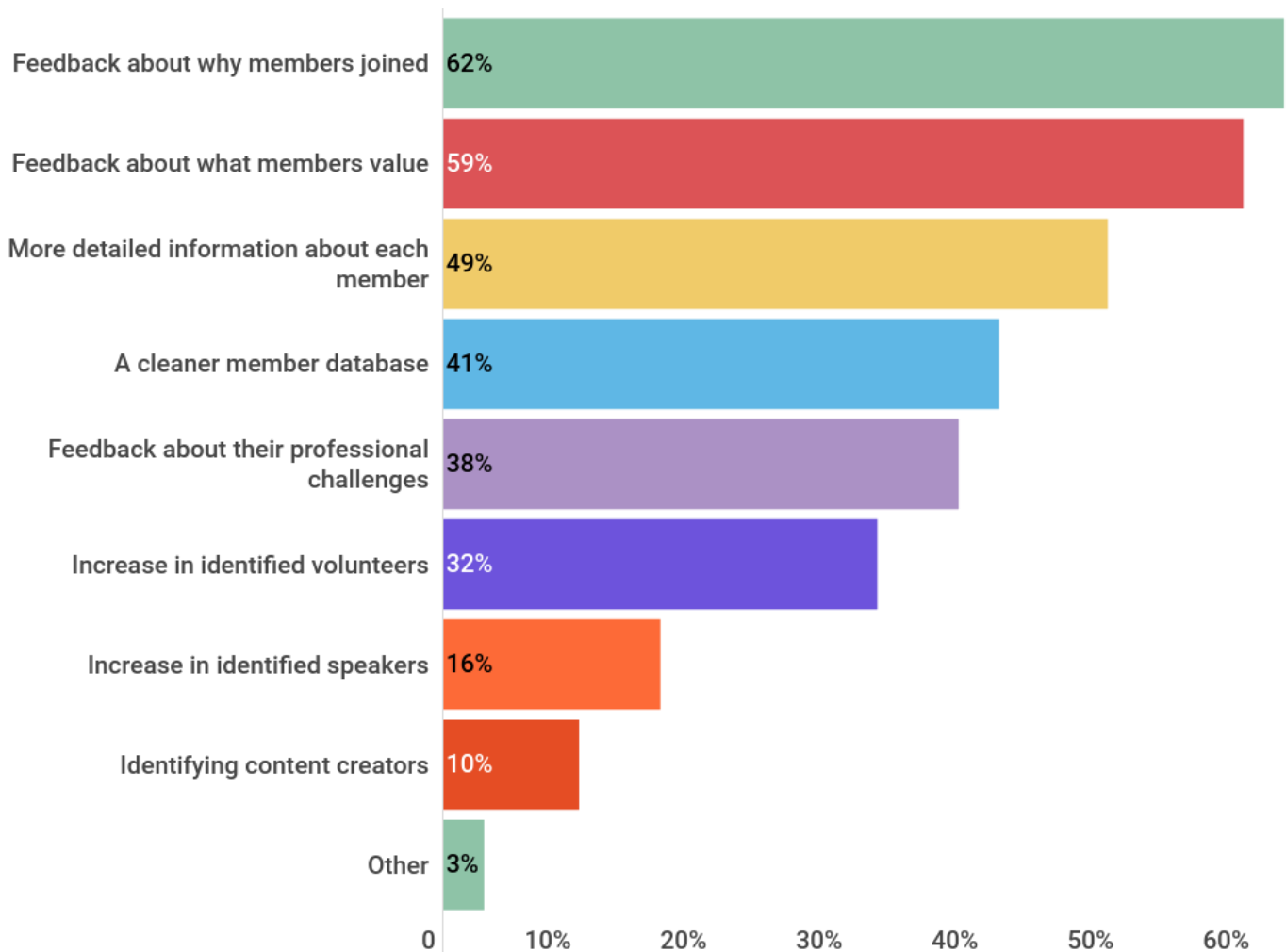


# The Return on New Member Onboarding Programs

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Association leaders don't just measure the effectiveness of new member onboarding programs in dollars and cents. There are other benefits as well.

## What are the other association benefits received as a result of your New Member Engagement plan?





# Most Association Leaders Onboarding Program!



# their New Member

 **37%**

We believe our program is very-moderately successful.

 **26%**

Data indicates our program is very-moderately successful.

 **10%**

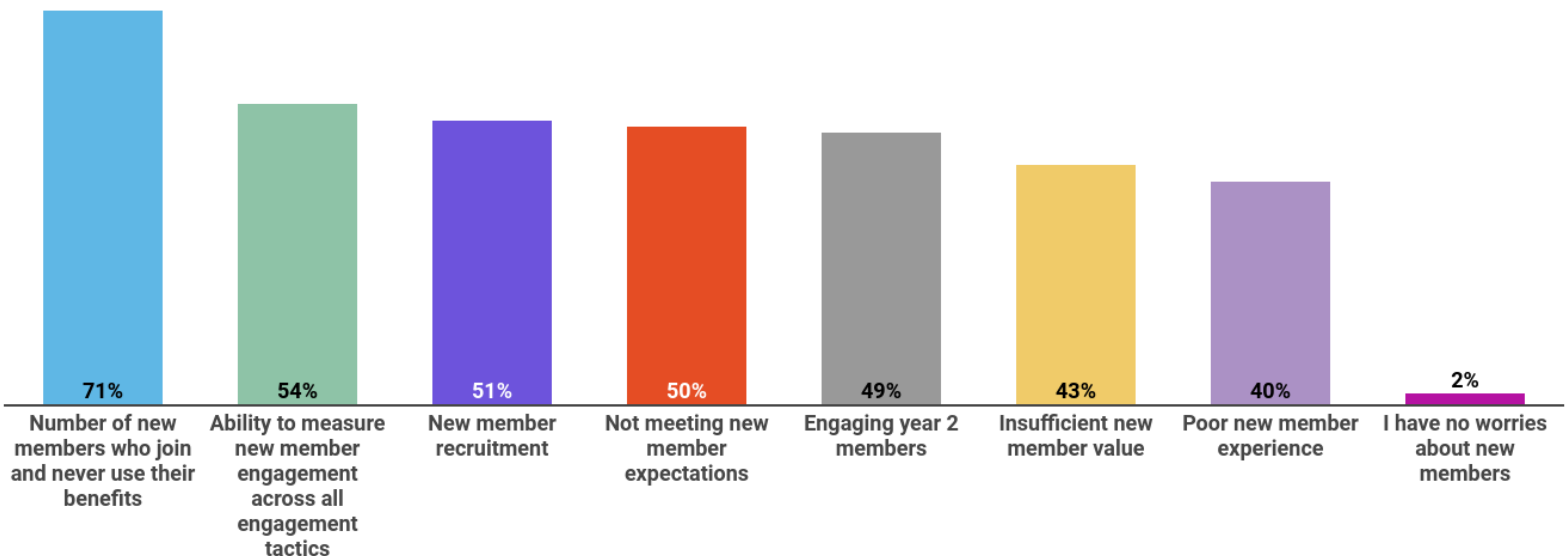
We believe our program is not successful yet.

 **29%**

Our program is too new to measure.

We are so glad that these programs work because there are lots of worries when it comes to new members. 71% of respondents stated that one of their biggest fears is that new members join and never use their benefits.

## What worries you about new members?



But, you don't have to worry now because new member engagement plans can help address every one of these worries (unless you have no worries, in which case, you should still implement a new member engagement plan - your members will love it!)

**New member engagement programs can do a lot to make associations healthy, so they must cost bazillions of dollars, right?**

**Nope, not at all!**



We asked what your new member engagement budget was, and for most associations, it is minimal.

**41% allocate less than \$1,000  
to their new member  
engagement plan**

**19% allocate \$1,001 to \$10,000**

**9% allocate more than \$10,000**

# The Mechanics of New Member Engagement Programs

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## Slow and Steady Wins the Race

The longer a program runs, the better its effectiveness.

### New Member Renewal Rates Get Better with Time



**75%**

New Member Renewal Rate for All Participants



**90%**

New Member Renewal Rate for Associations who've had a New Member Engagement Plan in Place for 10+ Years

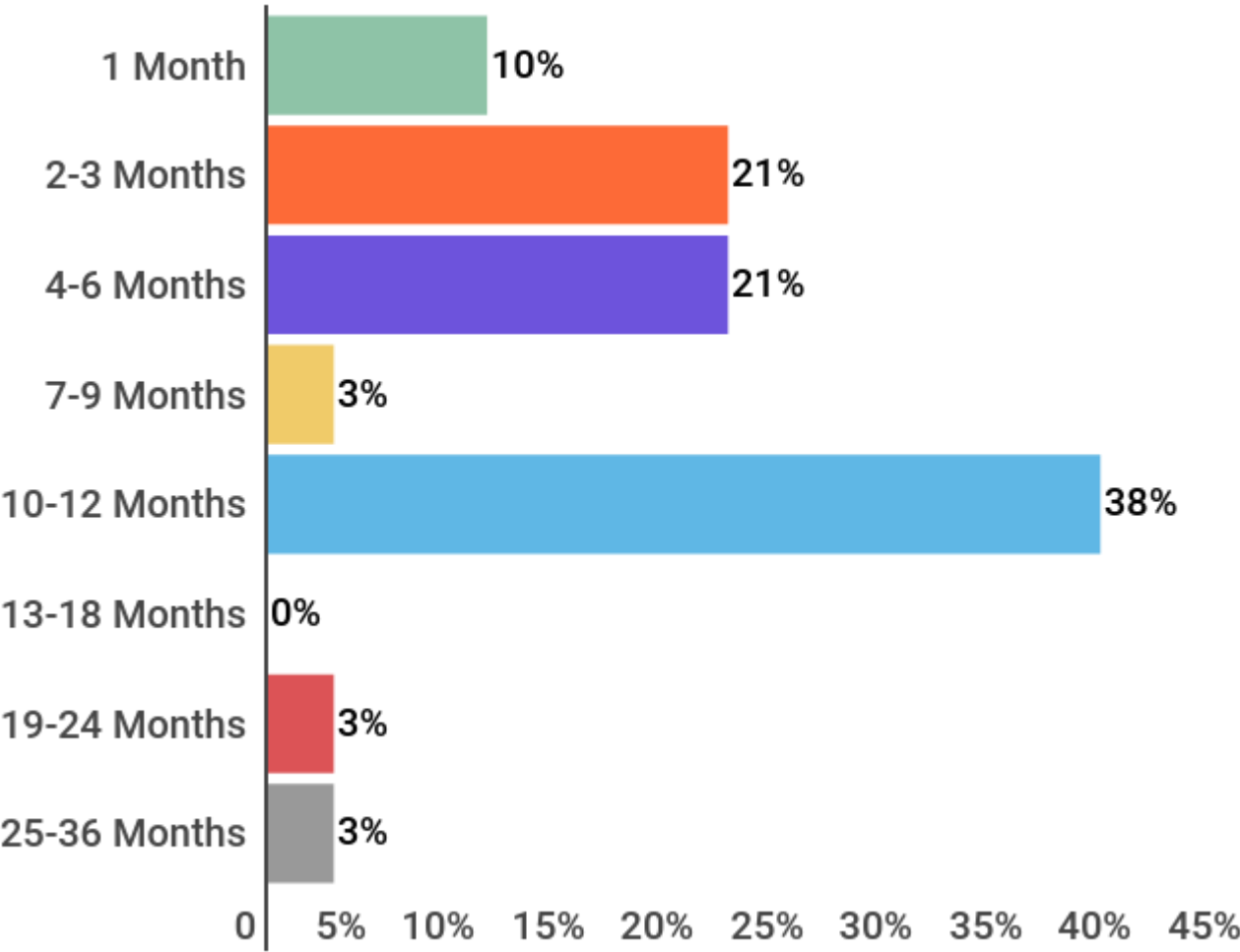


**New Member Engagement plans are generally slow to evolve.**

A comfortable growth cadence may be that in year one, you might try an email or email series, buoyed by good results, implement another tactic. By year three, your program might have three or four well-performing tactics.

Associations can just send a welcome email or engage with members for weeks, months, or years! Overall, the longer the program duration, the better the renewal rates .

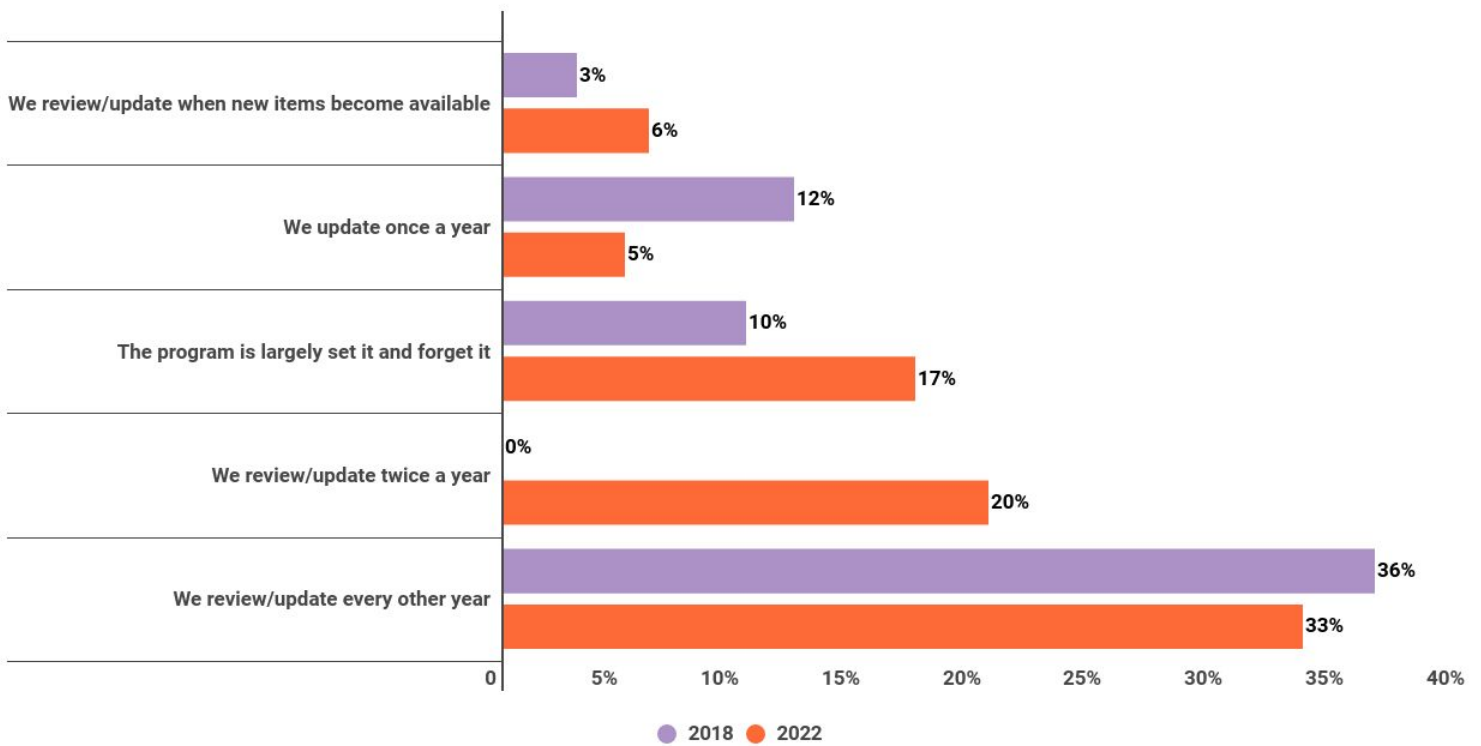
## New Member Engagement Plan Duration for Associations with 80% or higher New Member Renewal Rate



# Frequent Revisions Keep Materials Fresh

The most effective programs were reviewed regularly and updated when new information became available.

## Frequency of Update to the New Member Engagement Process



Associations with lower new member renewal rate were twice as likely to have a

## Set it and Forget it

policy in place, compared to those with an **80%** or higher new member renewal rate.

Those with higher renewal rates updated their plans more frequently.

If you can, continually add the latest and greatest information and benefits to your new member engagement plan communications. Cycle out older, poorer-performing emails. Allow your new member orientations to be fluid and include some exciting new benefits your new members might love.

If there's just not enough time to change your program on the fly, think about scheduling regular intervals in your calendar as reminders. Emails, especially, can get stale fast. **One association leader sets reminders in her calendar every three months to review her communications. She looks at the metrics and swaps out old topics for new ones.** If three months is too soon, try twice a year. Regularly updating is a great practice to get into, especially when your program is new or if you are trying to make it more effective.

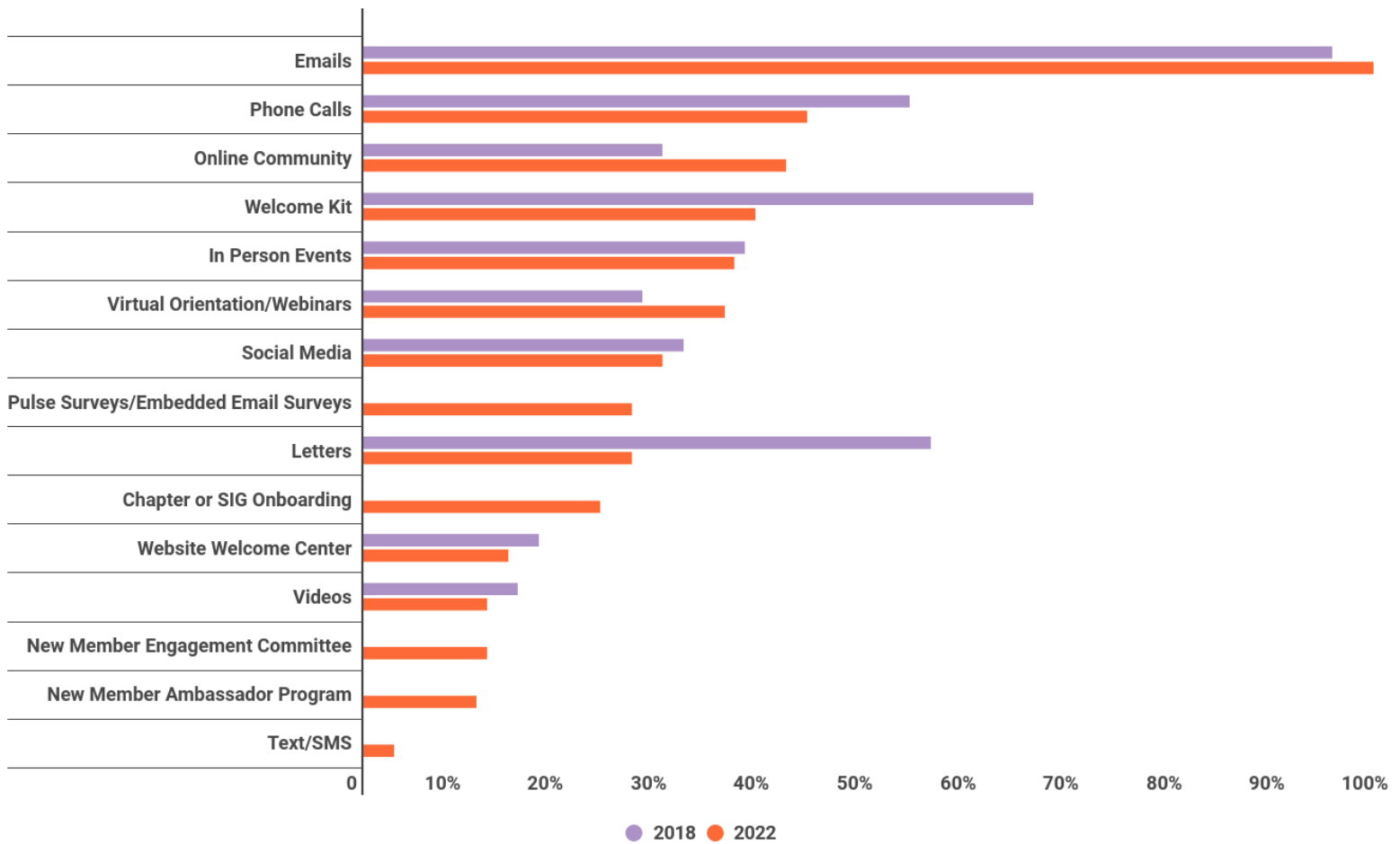
Also, when reviewing your messaging, feel free to try other tactics. There are more than welcome kits, emails, and letters to engage your new members.



# Lots of Tactics Can Do The Job

Here are the tactics associations are using today compared to four years ago.

## Comparison of Tactics and 2018 vs. 2022



Email, the #1 tactic in 2018, is even more ubiquitous in 2022. Letters and welcome kits are far less prevalent than they once were (but for some members, direct mail still captures attention better than email because it is so rare). There are also new tactics on the rise.

Engaging new members in online communities is far more popular; so are conducting virtual orientations. Based on responses from association professionals and consultants, we added a few tactics which are growing fast - surveys/pulse surveys, chapter or SIG-specific onboarding, and new member engagement committees/ambassador programs.

If you are starting to panic about the fifteen tactics we measured, don't worry. You DO NOT need to incorporate all of them to be successful. A proliferation of tactics doesn't necessarily work better and might dilute your efforts. We suggest you start with one or two tactics, get comfortable with them, and slowly add on.

Your program should eventually use a handful of tactics, but which one do you start with, and which tactics might be the most successful? Remember, these are the aggregate results, so another association's high-performing tactic might not be yours. As we said, some associations are still rocking it with direct mail because it's so unexpected these days. You do you! However, a couple of core tactics should be in most associations' new member programs.

Nearly every association uses email to engage new members, but while it is the most effective tactic, there's still room to improve. Aside from email, the usage and effectiveness of the rest of the tactics are remarkably different depending on the kind of association you serve.

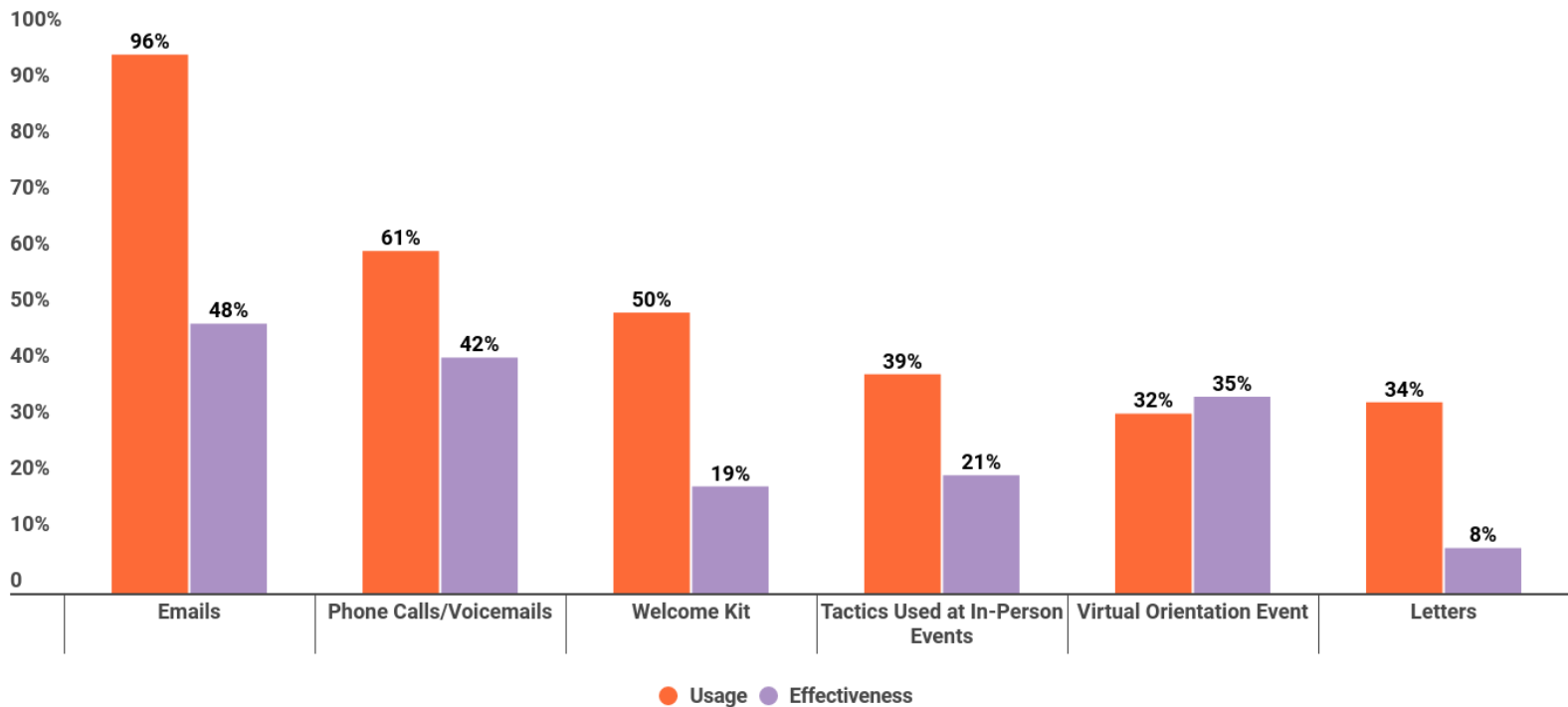


## How the tactics stack up for trade and professional associations



# Trade Association Tactic Usage and Effectiveness

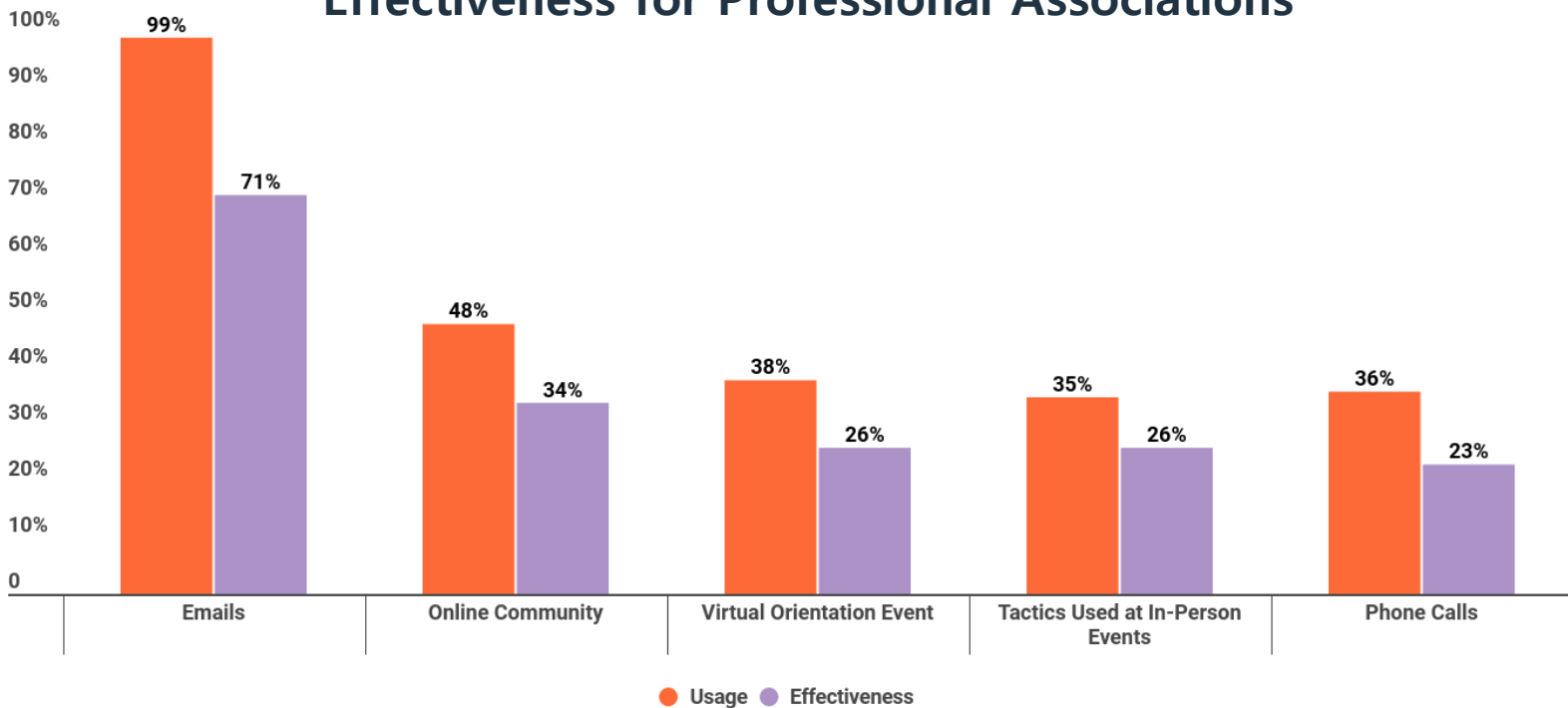
## New Member Engagement Tactic Usage and Effectiveness for Trade Associations



Nearly every participating trade association uses email. Phone calls are also near the top of the list for trade associations. Look at the effectiveness of virtual orientation events. We bet usage of virtual orientation events will continue to rise for trade associations.

# Professional Association Tactic Usage and Effectiveness

## New Member Engagement Tactic Usage and Effectiveness for Professional Associations



**Like trade associations, nearly all professional associations use email and find it very effective.**

**Professional associations are also finding effective ways to use their online communities to engage new members.**

# Email

First, let's talk about email since it's an essential part of the new member engagement equation for every type of association.



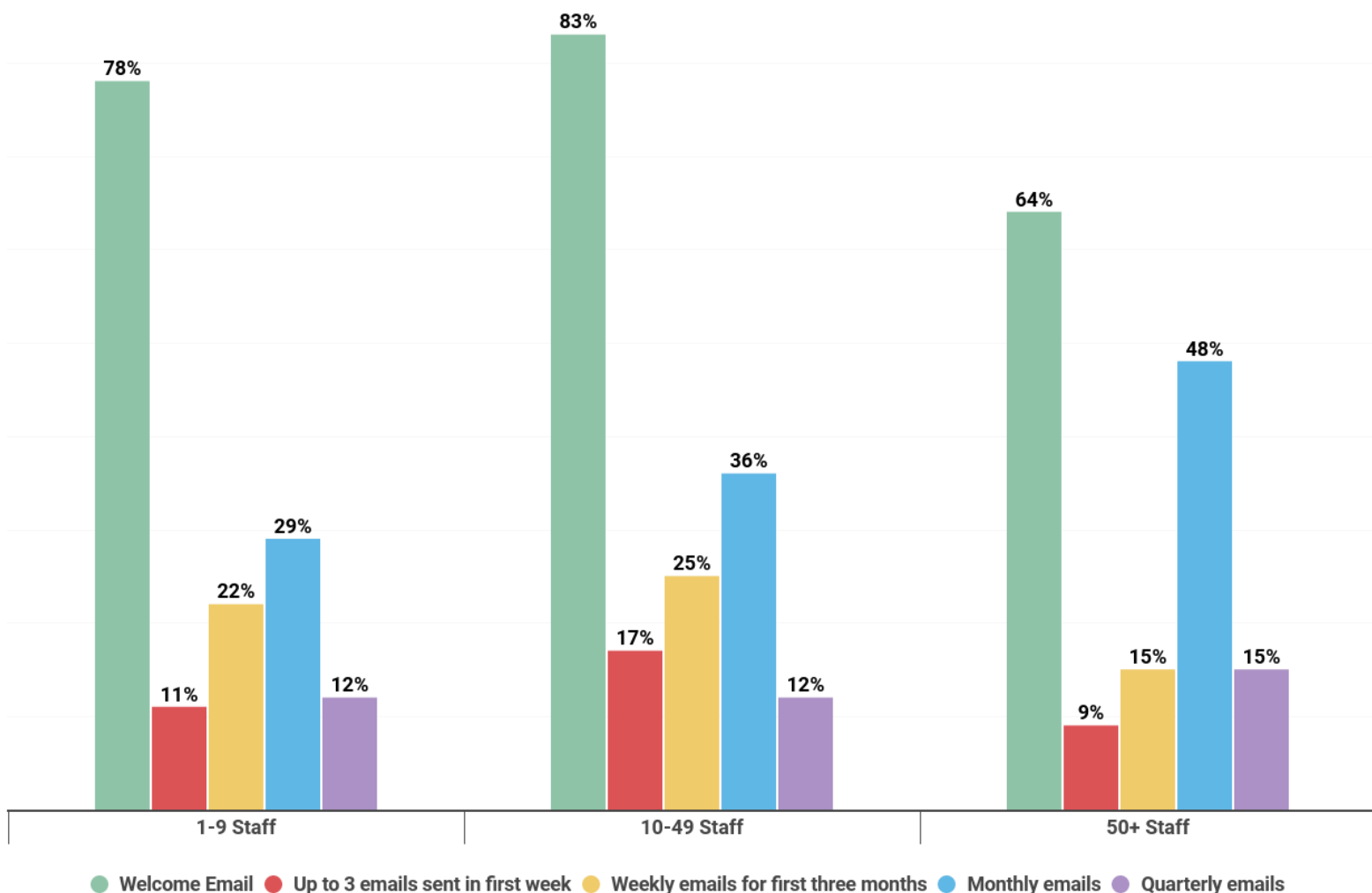
## **In the first study, we learned that email effectiveness is linked to the 3-3-6 schedule.**

The schedule works like this: three new member-specific emails are sent in the first week after joining, then weekly for the first month, and then monthly for the next six months for a total drip campaign duration of seven months. The 3-3-6 schedule is a best practice, and many associations saw an increase in renewals by implementing it. BUT...

... At the same time, we know that not every association has the resources or benefits/content to warrant such an extensive email campaign. Fewer smaller associations create drip campaigns, while more mid-sized and larger associations leverage a monthly email series.



## Email Frequency by Size of Association



Member research, conducted by Kaiser Insights LLC, suggests that

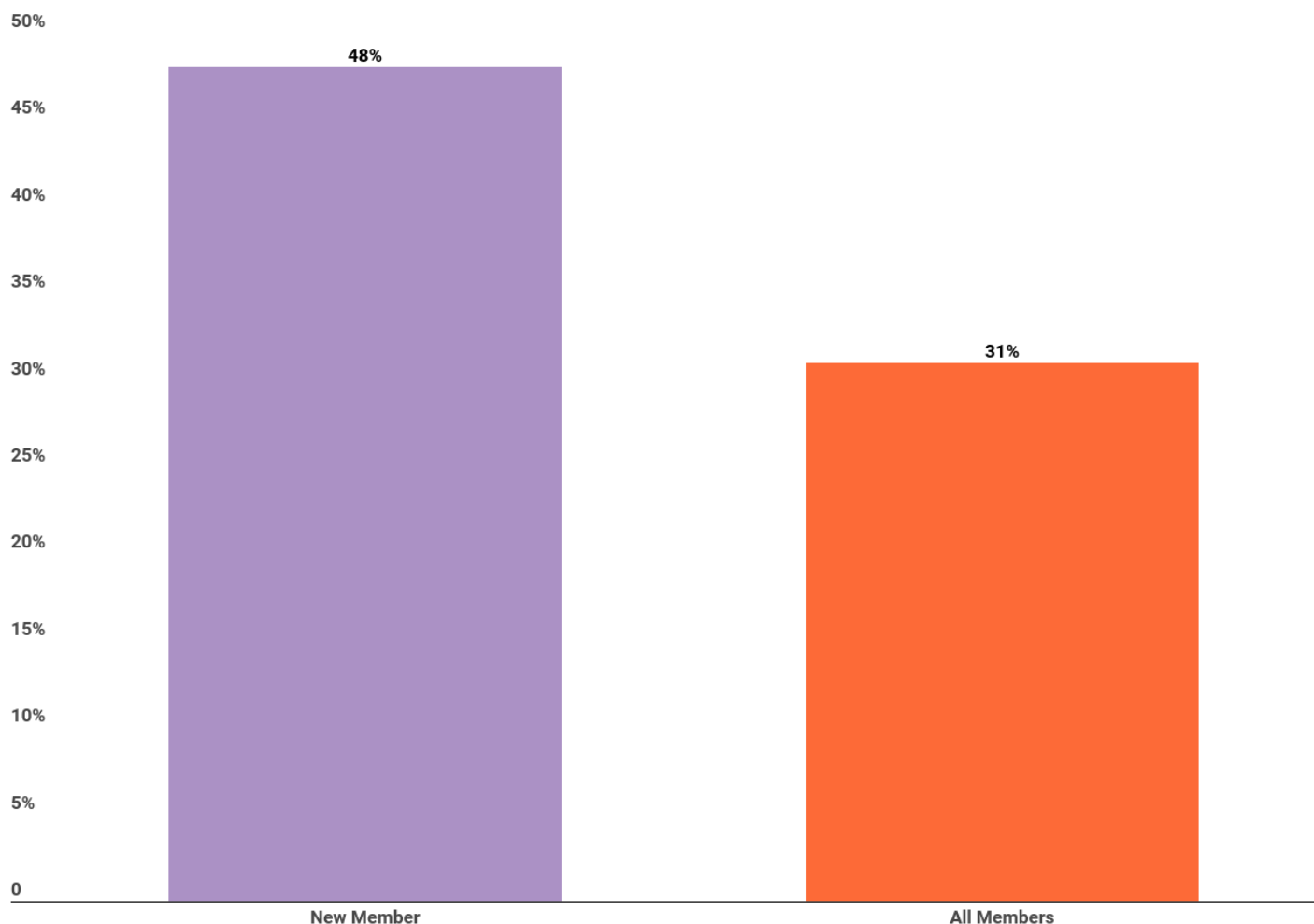
**members often decide to engage within the first 3 days to 3 weeks after they join.**

Consider trying a few new member-specific emails in the first week and month while they are most receptive to learning about the association.

**New members are more likely to open emails.  
Let's grab the opportunity to engage new members  
when they are the most receptive  
to our messages!**



## Open Rates by Member Type



Members at some associations follow a predictable member journey tied to their career or organization progression. The predictable journey can include milestones like student graduation, a company reaching a new size threshold, promotion to first-time manager, the organization must comply with new regulations, etc. If your membership follows predictable paths, you can write short messaging that points them to content and resources that appeal to them in their milestone moment. But this doesn't work for everyone.

Other associations have complex member benefits structures. They may have member contacts from diverse professional backgrounds whose needs differ, as is often the case for trade associations. If you are an association like this, a new type of messaging might be precisely what you need.



**PropFuel** calls it Conversational Engagement. Here's what they say about Conversational Engagement:



Conversational Engagement is based on the premise that what your members have to tell you is just as important as what you have to say to your members. Not all blast emails are motivating to all new members all the time, but drawing people into a conversation is motivating!

When you ask your members questions instead of broadcasting information at them, you engage in a two-way conversation. This approach makes members feel heard and helps uncover new details on individual wants and needs. From this more informed place of listening, you can serve members better, both in the moment and long term. Learn more about this approach by downloading the complimentary [Conversational Engagement eBook](#).

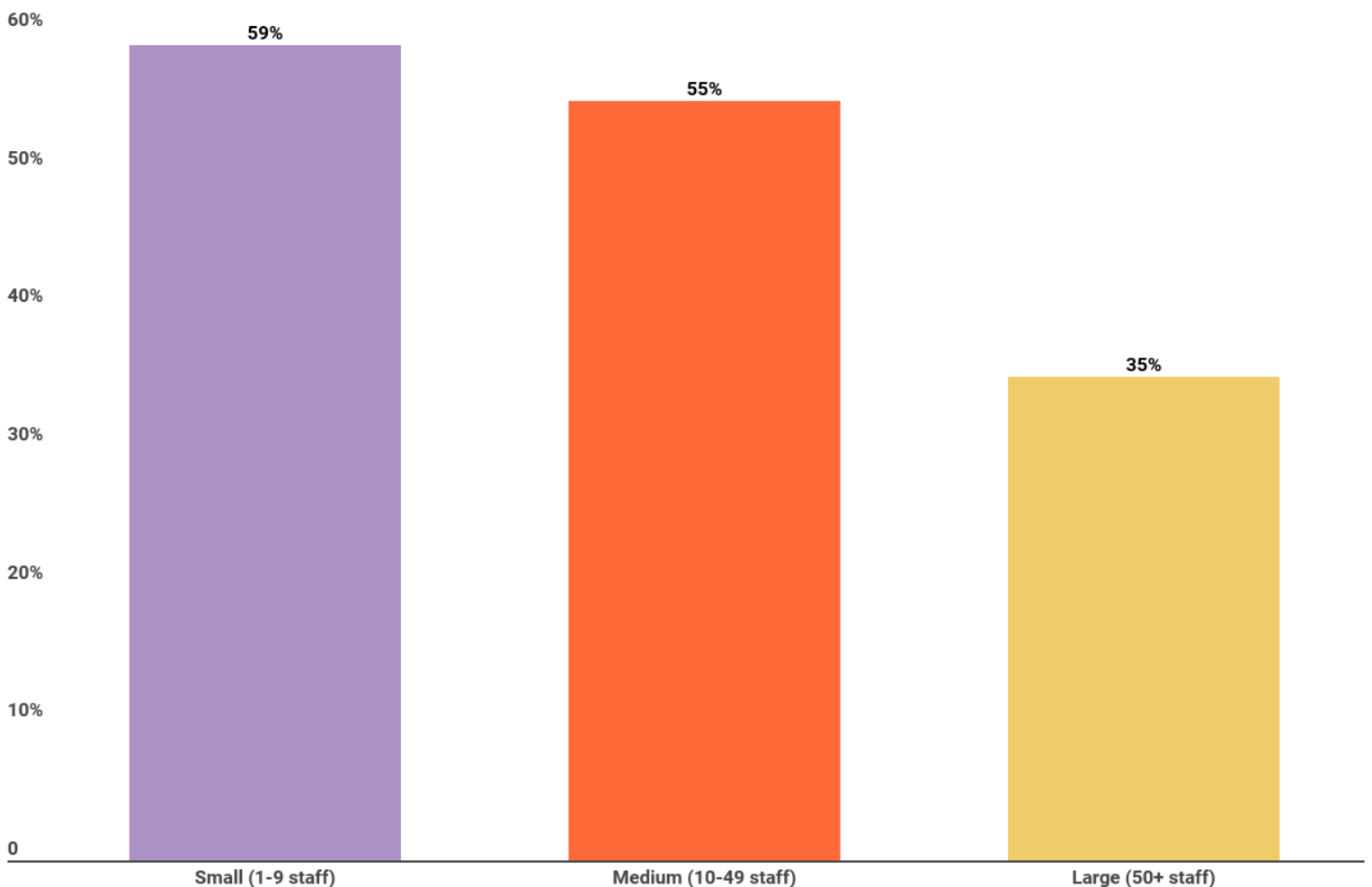


## Phone

While more emails are sent more often to new members by medium and larger-sized associations, more smaller associations make phone calls.

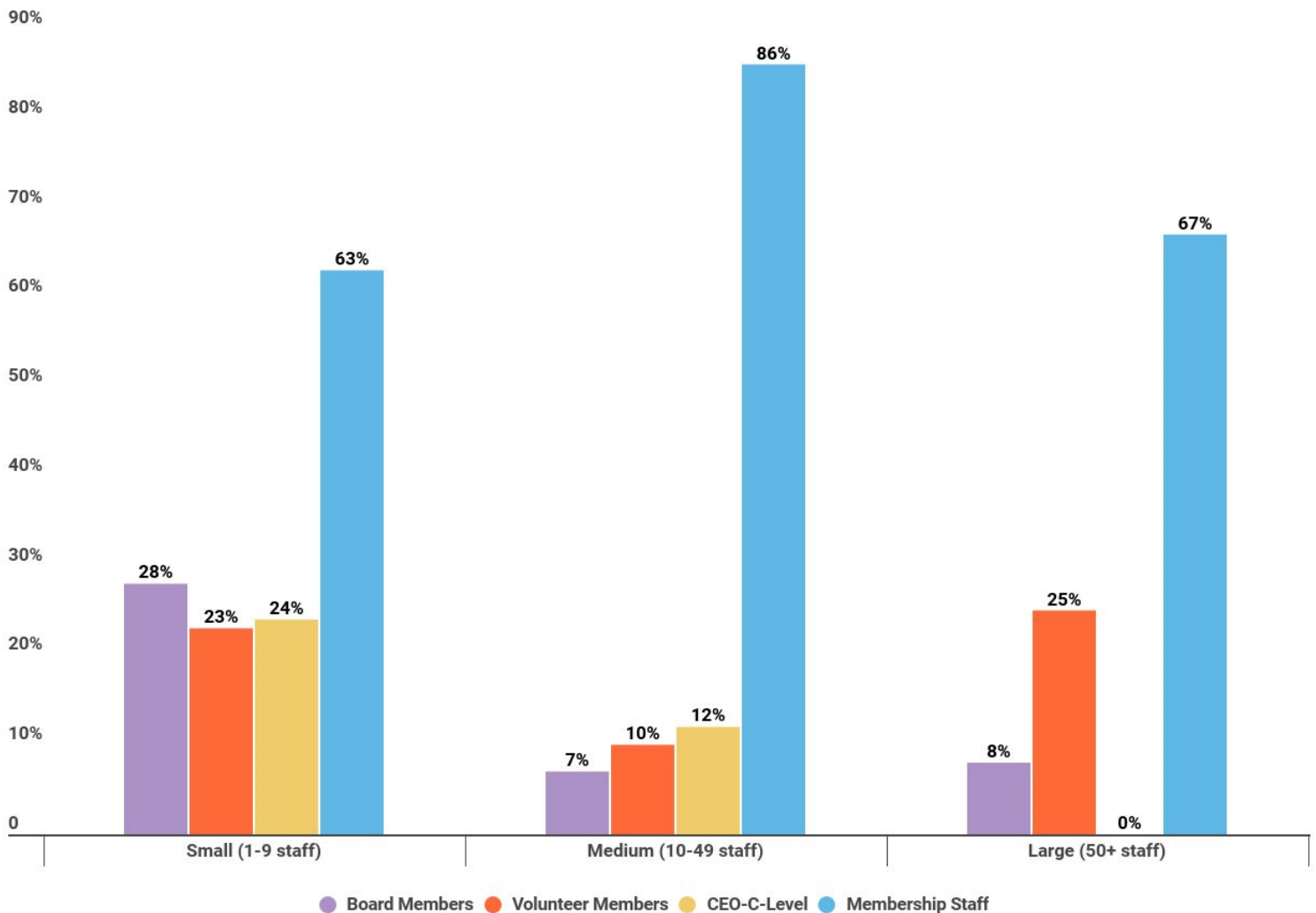


### Associations that Call New Members





## Who's Making the Calls?



## Staff and Volunteers Call New Members

This changes by association size. All hands are on deck in smaller associations. Membership staff takes on much more of this role in mid to large-sized organizations.

Phone calls are most effective when they have a purpose, which can be as simple as letting members know that you are there if they need anything, but there needs to be a reason for the member to talk to you. Engagement should not be a time when you sell. It should be a time when an association helps a member better be a part of the community.

- Scott Oser, Membership, Marketing, and Sales Expert

## Online Communities

Online Communities are a much more popular and effective new member engagement tactic now than they were four years ago.

**48%**

**more popular**

Professional associations lead the charge, with 48% employing this tactic versus 29% for trade associations.

# How are Online Community Managers Welcoming New Members?



19%

send a welcome emails that comes from the online community



16%

sets digests to automatically send to new members



15%

post a welcome message within the forum to new members



13%

invite new members to introduce themselves

## There are lots of creative ways community builders are going about onboarding,

including drip email campaigns, calls, videos, and pop-ups on the site to create a virtual tour.

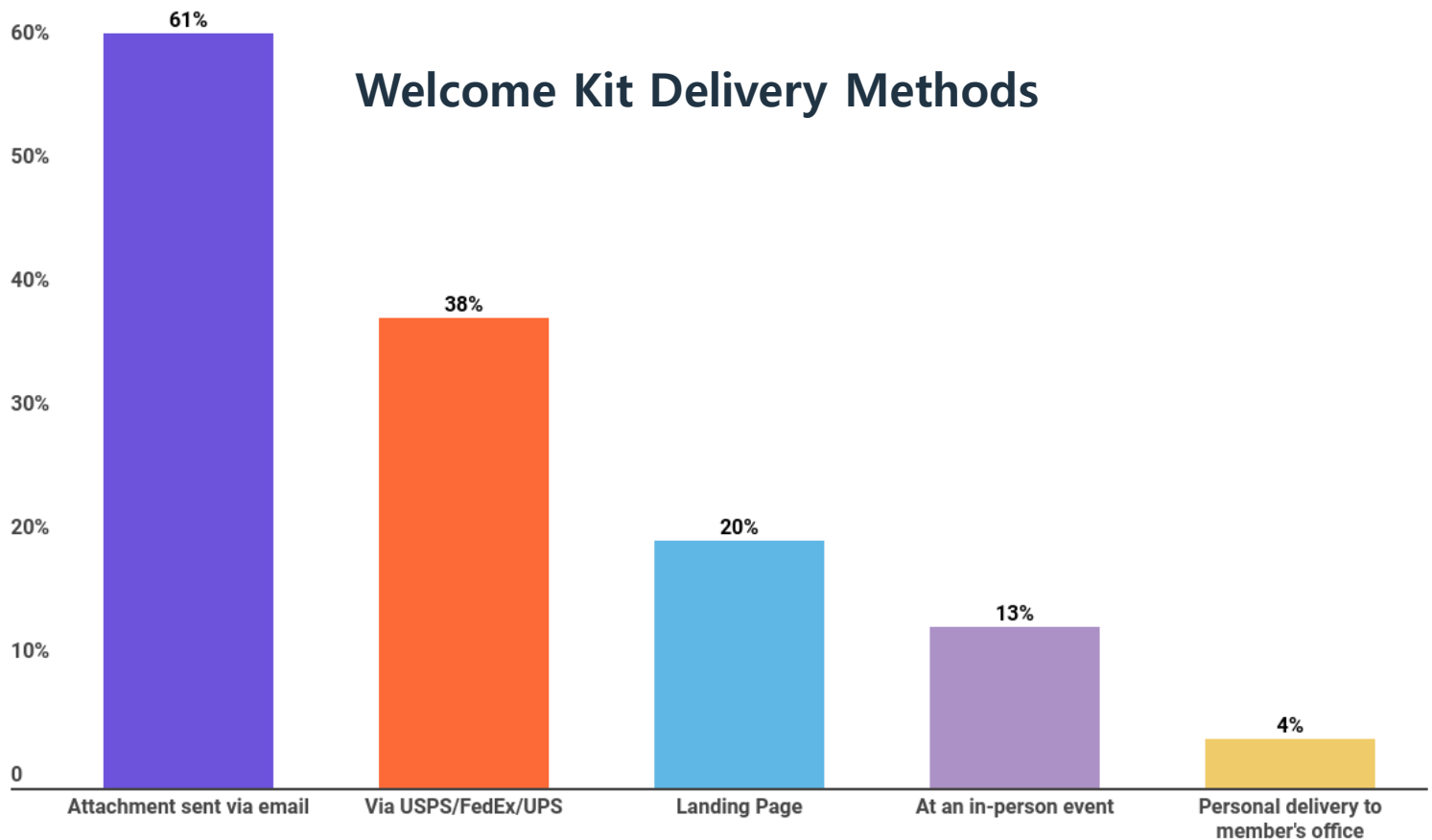
The important thing to remember is that onboarding is less about helping someone complete a profile (even though that is important) and more about getting someone comfortable in this new digital space and helping them feel welcome.

Community leaders are also helping new members engage in the broader association. Programs, like 'Ask Me Anything' sessions with organization business leaders or partnering on content, can help bring visibility to larger association offerings and connect members to them. Working with the events team to start discussions and connect people before an in-person event helps members engage more fully face-to-face, and those connections continue after the event ends.

- Marjorie Anderson, Founder, Community by Association

## Welcome Kit

Once upon a time, welcome kits were envelopes stuffed with a welcome letter, miscellaneous brochures, a past journal or two, a few slip sheets, perhaps a smattering of promotional items, and a membership card. Many association professionals fear these welcome kits will end up in the recycling bin. Today, we are seeing a trend toward more welcome kits distributed via digital methods.



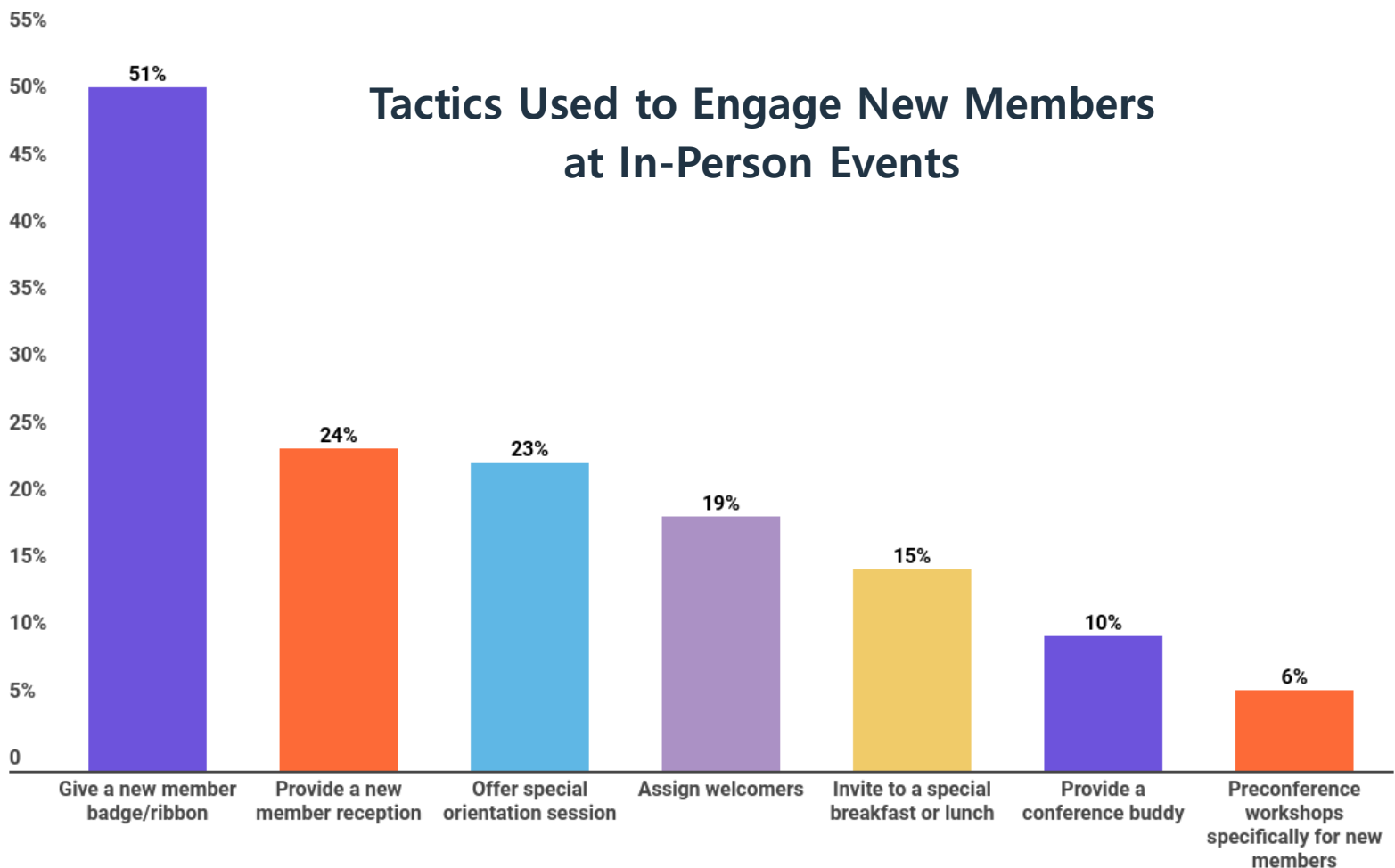
**Welcome kits are more popular with trade associations (51%) versus professional associations (34%)**

However, even among trade associations, the effectiveness of this tactic appears to be in question, perhaps because physical distribution or opening email attachments are hard to measure.

## Engaging New Members at In-Person Events

Once the #3 ranked tactic for new member engagement, this tactic has dipped, likely due to the coronavirus pandemic. As in-person registrations strengthen, we expect more use and innovation around engaging new members at conferences, monthly meetings, and other events.

As you read the list of strategies event hosts employ to engage new members, think about how to adapt these strategies to the digital world. We suspect that engaging new members at virtual events will also continue to grow in usage and effectiveness.



# New Trends to Keep an Eye On



Some tactics evolved so much (some were not even on our radar four years ago) that they deserve a special call out.

**Of all the 16 new member engagement tactics we asked about, virtual orientation events were the #1 tactic associations most wanted to try.**

## Virtual Orientation

Of the associations that conduct virtual orientation events now, they rank these events highly effective.

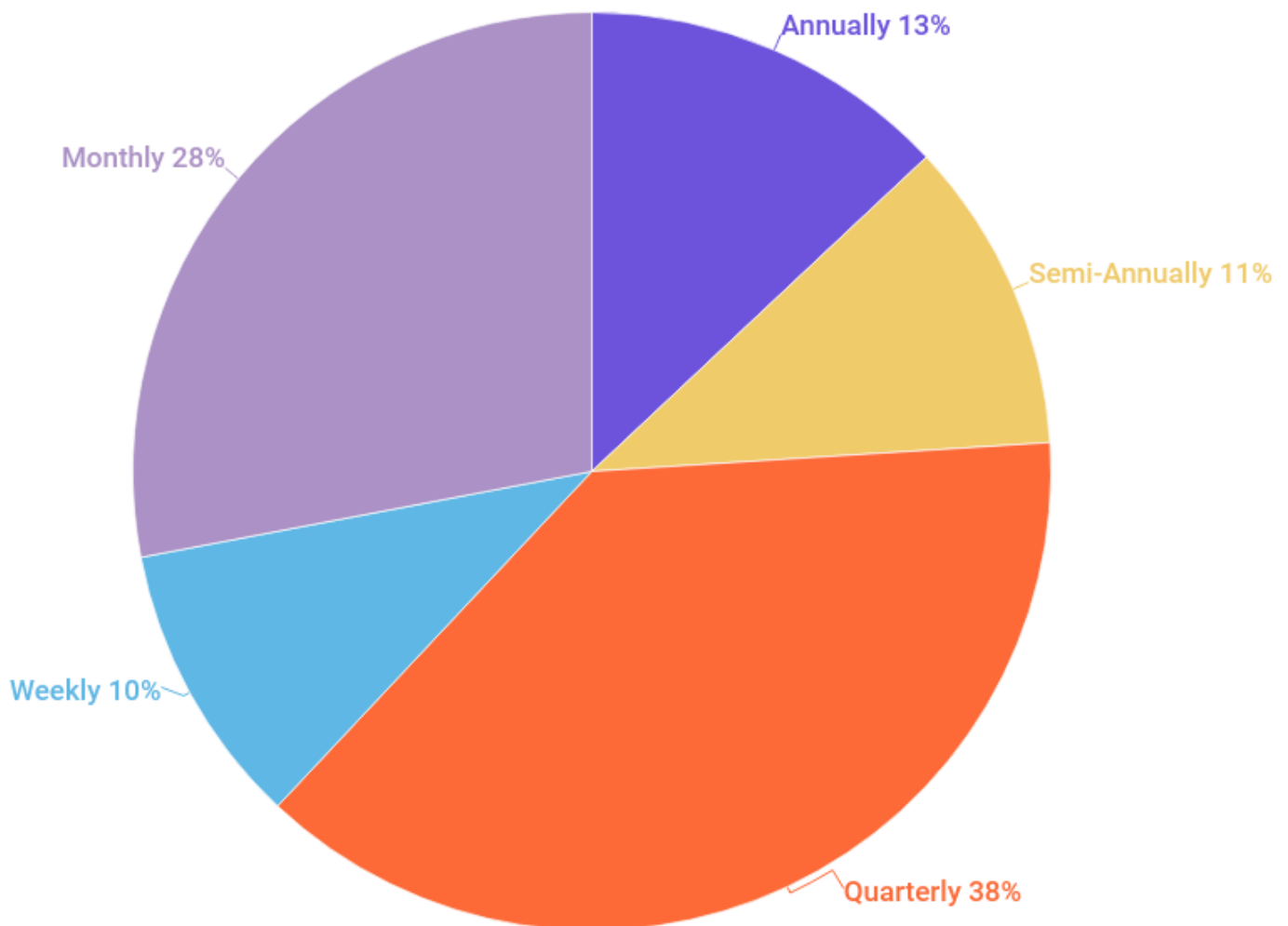
No longer a static webinar, today's virtual orientation events are far more interactive. 70% are live and provide Q&A time; another 42% allow attendees to drive the topics and content discussed. Chat is becoming more important, with 10% dedicating chat ambassadors to these events.

How often should you schedule a new member virtual orientation event? That probably depends on whether all your members join on a specific date or all year round and the number of members joining at any given time. Most associations hold their events quarterly.



## 38% Host New Member Virtual Events Quarterly

### New Member Virtual Event Schedule



Are you curious about running an effective new member onboarding event? **Matchbox**

**Virtual Media** has tons of event templates. Here is one recipe to get you started:



Looking for creative ways to break the ice with your new members? Try out our introverted-friendly Virtual Trivia activity, which is sure to build strong connections and meaningful memories! Pick an exciting topic, mix together a diverse team of members and let the games begin.

Check out our Trivia 'recipe' below, a step-by-step guide with tips & tricks on creating a memorable, engaging experience for your members.

Check out our Trivia Recipe



Explore more of our virtual session recipes in the Matchbox Kitchen



## Pulse Surveys

Surveys & quick polls are tactics that 23% of respondents have employed. We are keeping our eyes on this one because there are more opportunities to get the pulse of your new members on member profile pages and within website chat functions. You can also incorporate pulse surveys into virtual orientation events.

**Elizabeth Weaver Engel**, Chief Strategist at Spark Consulting

recommends asking two questions within the first few months. The first is,

**Why did you join?**

The sooner you can learn what that is and connect each new member to that thing so you can start delivering concrete value to her, the better.

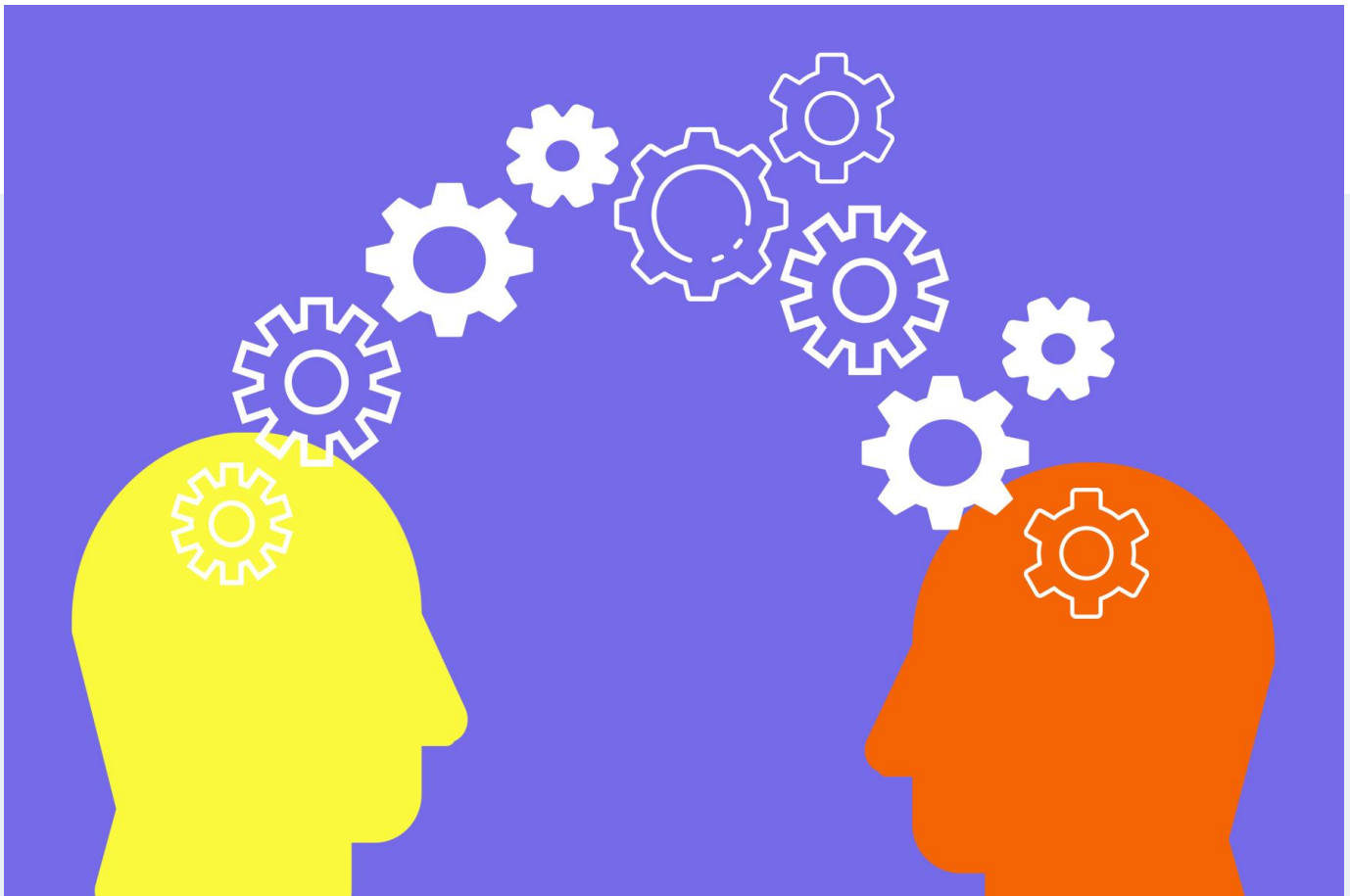
Another good thing to ask about early on is:

**How did you hear about us?**

This provides another data point for tracking what's happening with your recruitment efforts, so you know where to put resources - and where NOT to put them.

## New Member Committees and Ambassador Programs

In conversations with association leaders, as we were getting ready to field this study, there was a lot of interest in the idea of new member mentors. Pre-COVID many associations tested conference buddy programs where a new attendee was paired with a long-time attendee. The long-time attendee might reach out to let the new attendee know what to expect, meet them when they arrive, and even introduce them around. Buddies are an effective way to engage new members at the conference, but what about the association as a whole? We love the way associations are now expanding their buddies to ambassadors.



**Are you curious about the ambassador concept?**

**Here's what one association is doing:**



**We initiated a New Member Ambassador Program that assigns new members to an ambassador. The ambassadors contact new members within the first month of their membership to welcome them, answer questions, give a quick tour of our website if interested, and invite them to an upcoming event. Each ambassador attends a formal ambassador training session and is assigned anywhere from 1 to 5 new members monthly.**

We also have one or two ambassadors who welcome new members at each event. The program just got underway in the last few months, and the feedback we are getting from our ambassadors is very valuable.

- **Tony Campisi**, Executive Director

**Keystone Chapter Community Associations Institute**

# Interesting Differences for Each Size and Type of Association

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For the last four years, I've been running around saying, "the best new member onboarding programs span seven or more months and include a handful of tactics, including a carefully crafted, multi-touch email campaign." But honestly, this never sat well with me. I wondered about all the chapters and small associations run by volunteers or the 0.5 - 2 person staff associations. Is there REALLY the need for them to devise a new member onboarding campaign like a 10+ staff person association??? Do lower-budget associations need the same technology to engage new members as associations with budgets of millions of dollars? Now, we know these answers and the answers are no and nope! There's the perfect size new member onboarding program for every association.

**Not all tactics are equal in that they don't work equally well for all sizes of associations.**



Small associations might be able to spend time on the phone with each new member or 10-minutes crafting an elegant hand-written welcome card. Large associations may have thousands of new members joining each week, so they depend on tactics that scale.

## **Small Associations**

Small staff associations (0-9 staff) rely on a welcome email, welcome phone call, welcome kit, social media, and give new members a special badge or ribbon at in-person events. As you might expect, leaders at higher levels, like the CEO and board members, tend to be involved in new member engagement in addition to membership staff. The tactics small associations most want to try are online orientation events and new member engagement committees.

## **Medium Associations**

Mid-size associations with 10-49 staff tend to manage more complex new member engagement plans that reach new members for many months. They send welcome emails, weekly emails for the first month, and monthly emails for up to one year. Online communities are extensively used to engage new members, as are welcome phone calls. Mid-sized associations put on quarterly, monthly, or weekly virtual orientation events. For those not hosting virtual orientation events, this is the tactic they most want to try.

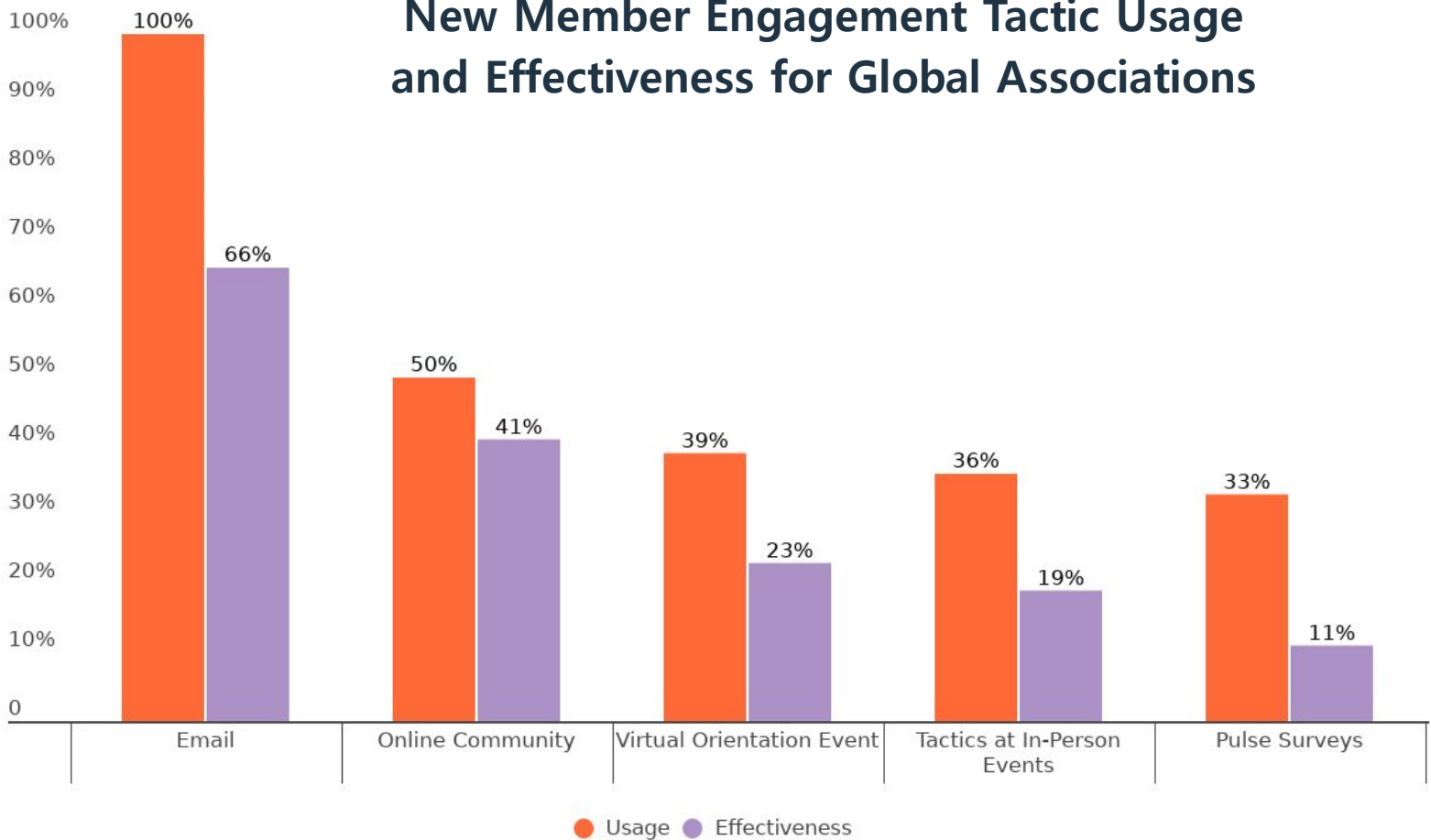
## **Large Associations**

50% of large associations extend their new member engagement process up to 10-12 months, much longer than their smaller colleagues. These large, 50+ staff associations send a welcome email and a new member-specific monthly email series, use their online community to engage new members, welcome kits and surveys, and tend to rely on their chapters and special interest groups to onboard new members. Large associations most want to try to incorporate videos and new member ambassador programs into their new member onboarding programs.

## Global Associations

Local, state, and national associations align with size data. But global associations with the largest geographic area are a bit different. Like their colleagues with a smaller geographic reach, they use email (a welcome email and monthly email), and then the tactic list diverges. Global associations have a much higher usage rate of online communities to engage their new members, using the forums to welcome new members with personalized messages, invite new members to introduce themselves, and automatically send weekly digests from the community. 39% host virtual orientation events either monthly or quarterly. 36% use new member engagement tactics at in-person events where they give new members a special badge or ribbon and host a new member reception, and 33% use surveys. Most want to try a new member ambassador program.

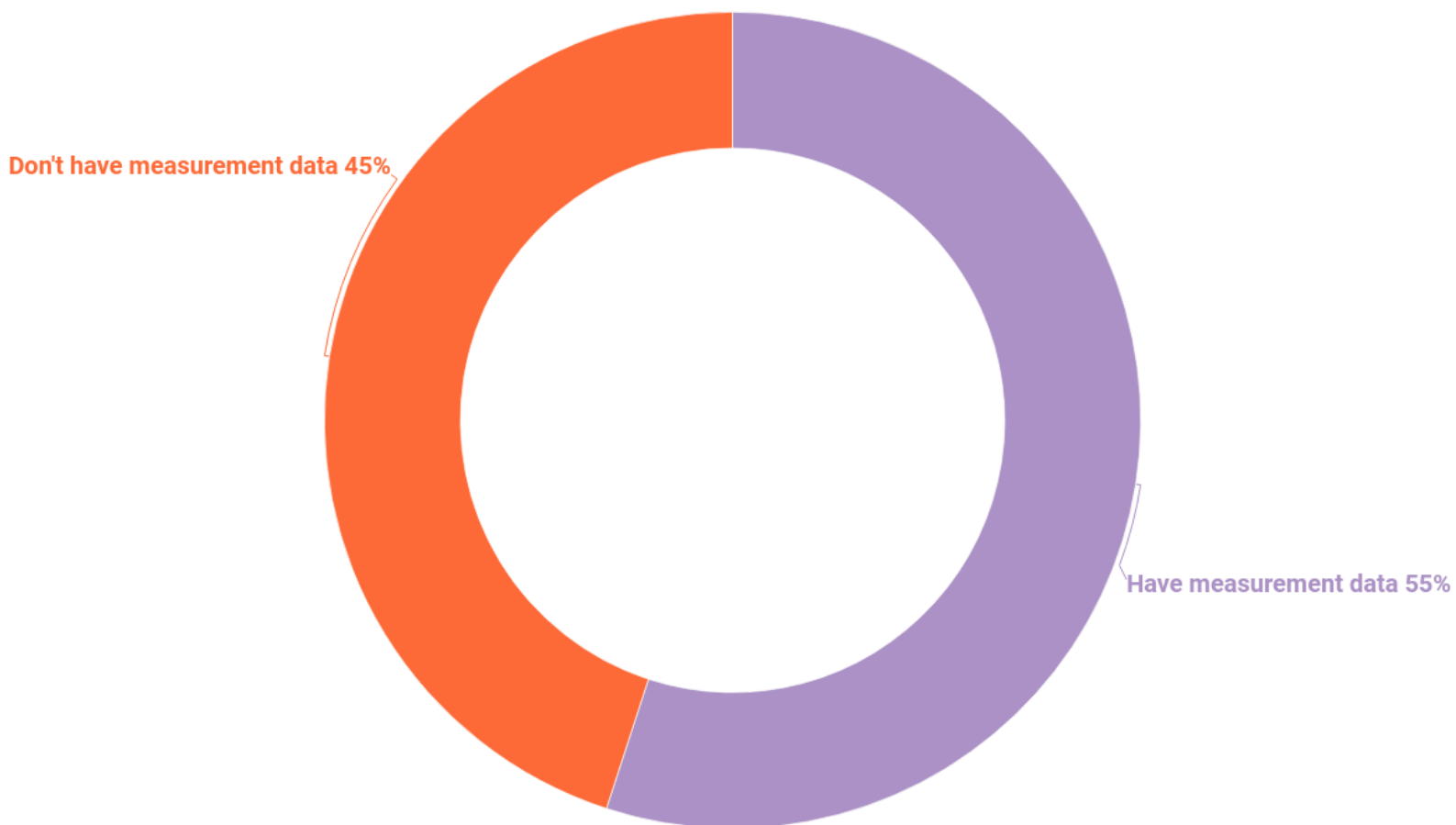
### New Member Engagement Tactic Usage and Effectiveness for Global Associations



# How New Member Engagement Programs are Measured

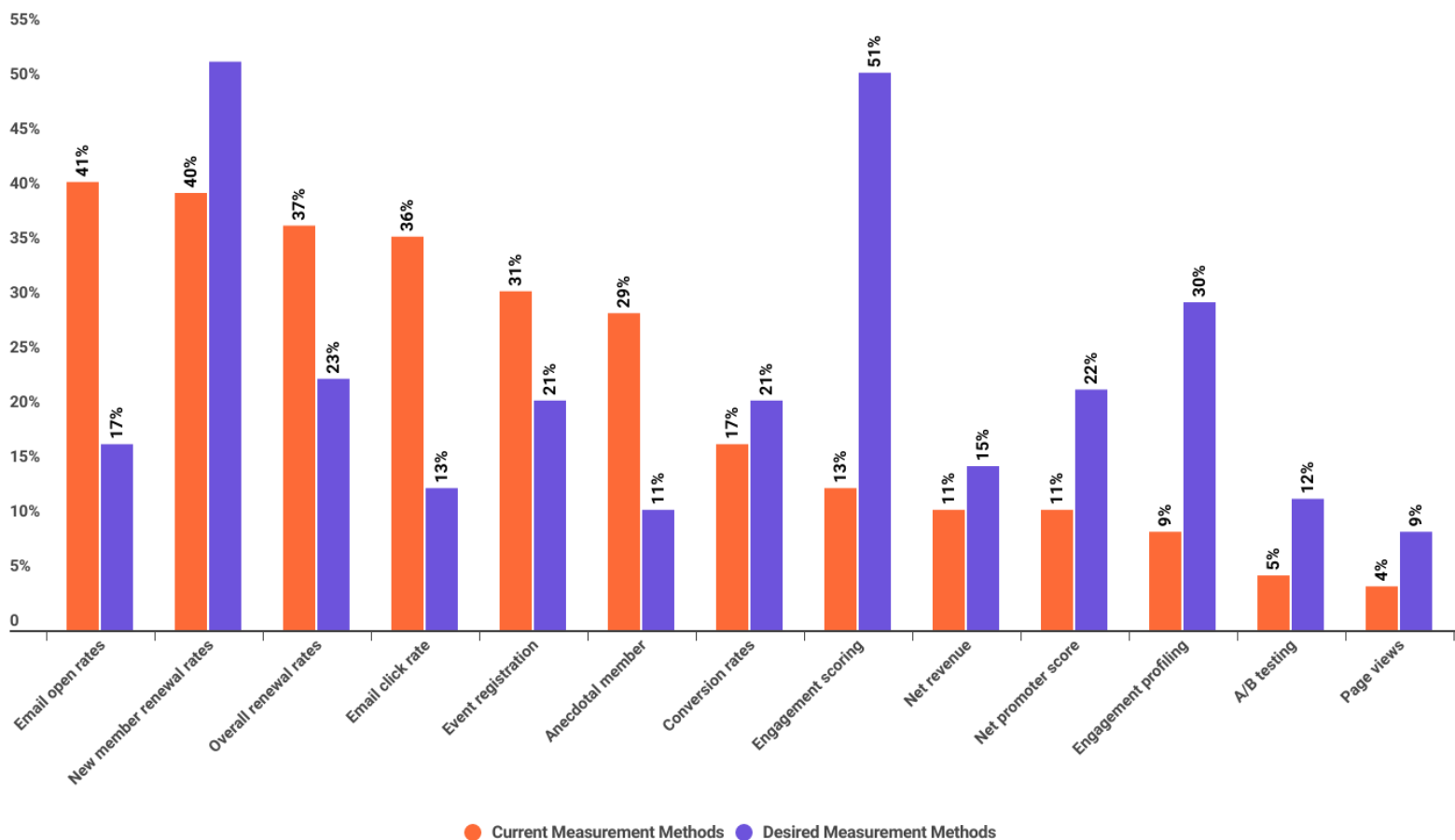
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## How Associations Measure their Programs



Measurement of these programs is difficult for many associations. And there is also a big difference between how we want to measure and how we actually measure.

# Difference Between Current Measurement Techniques and Desired Measurement Techniques

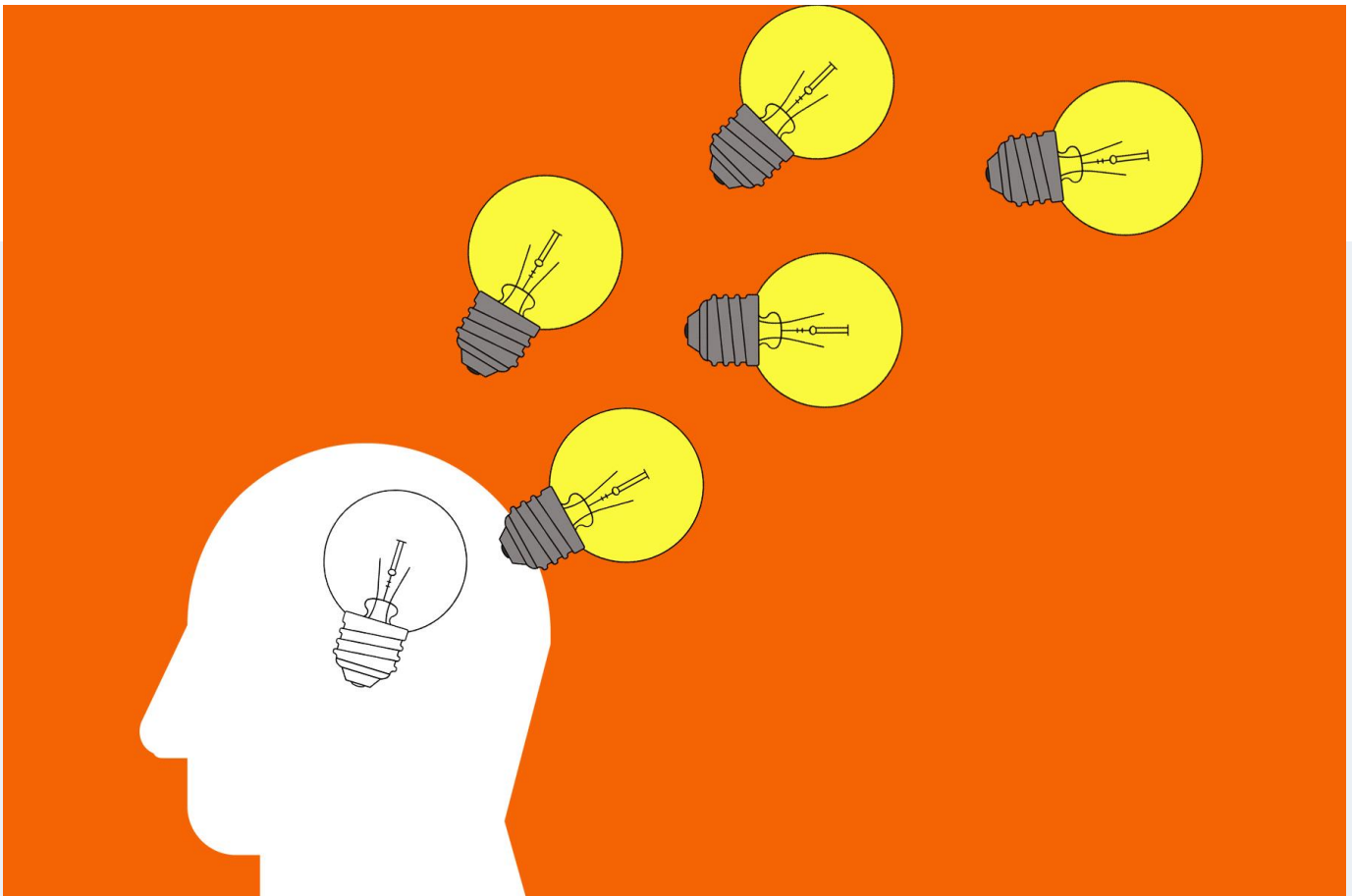


But associations are pragmatic. Small staff associations mostly want to measure new member renewal rates (46%), medium-sized associations want to measure new member renewal rates (62%) and engagement scoring (59%), and large-sized associations overwhelmingly wish to figure out engagement scoring (81%).



As our tour of the New Member Engagement Data Vault winds around to the end, remember, whether you work with a small, medium, or large association; a local, state, national, or global association, or a trade, professional, or hybrid association – there is the right new member onboarding plan for you!

We hope this report has helped you figure out where to start, what to improve, and given you some ideas for the next new thing to try.



# Find out More

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## Compare to Your Peers

Would you like to slice the data even further? Take the survey to access our comparison tools so you can filter the data in the way you wish.

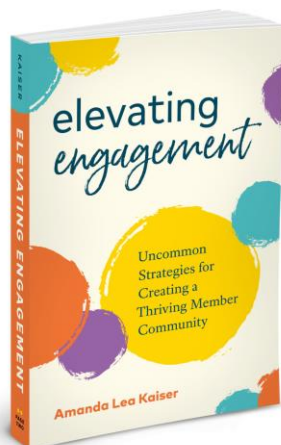
Take the Short Survey Now

## Benchmark With Your Members

Would you like to provide benchmarking insights like this to your members and drive non-dues revenue for your association? Visit [Dynamic Benchmarking's site](#) to learn about our secure data collection and benchmarking tool.

## Share the Knowledge

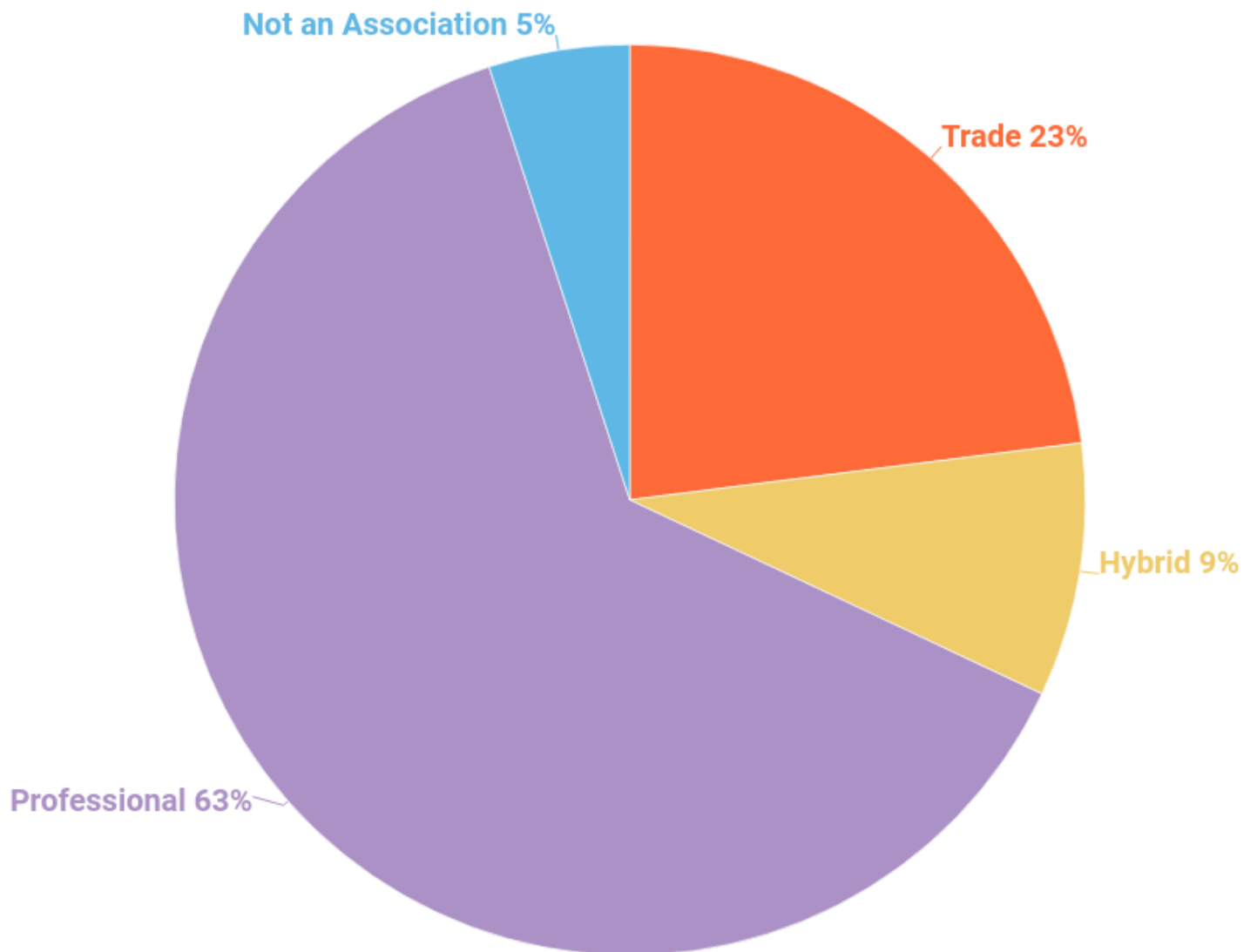
Would you like association leaders or your chapter, council, and affiliate leaders to learn this information? Book Amanda Lea Kaiser to keynote the results of this survey and help participants craft the right plan for their unique association. Watch for her upcoming book *Elevating Engagement: Uncommon Strategies for Creating Thriving Member Communities*. [Contact Amanda](#).



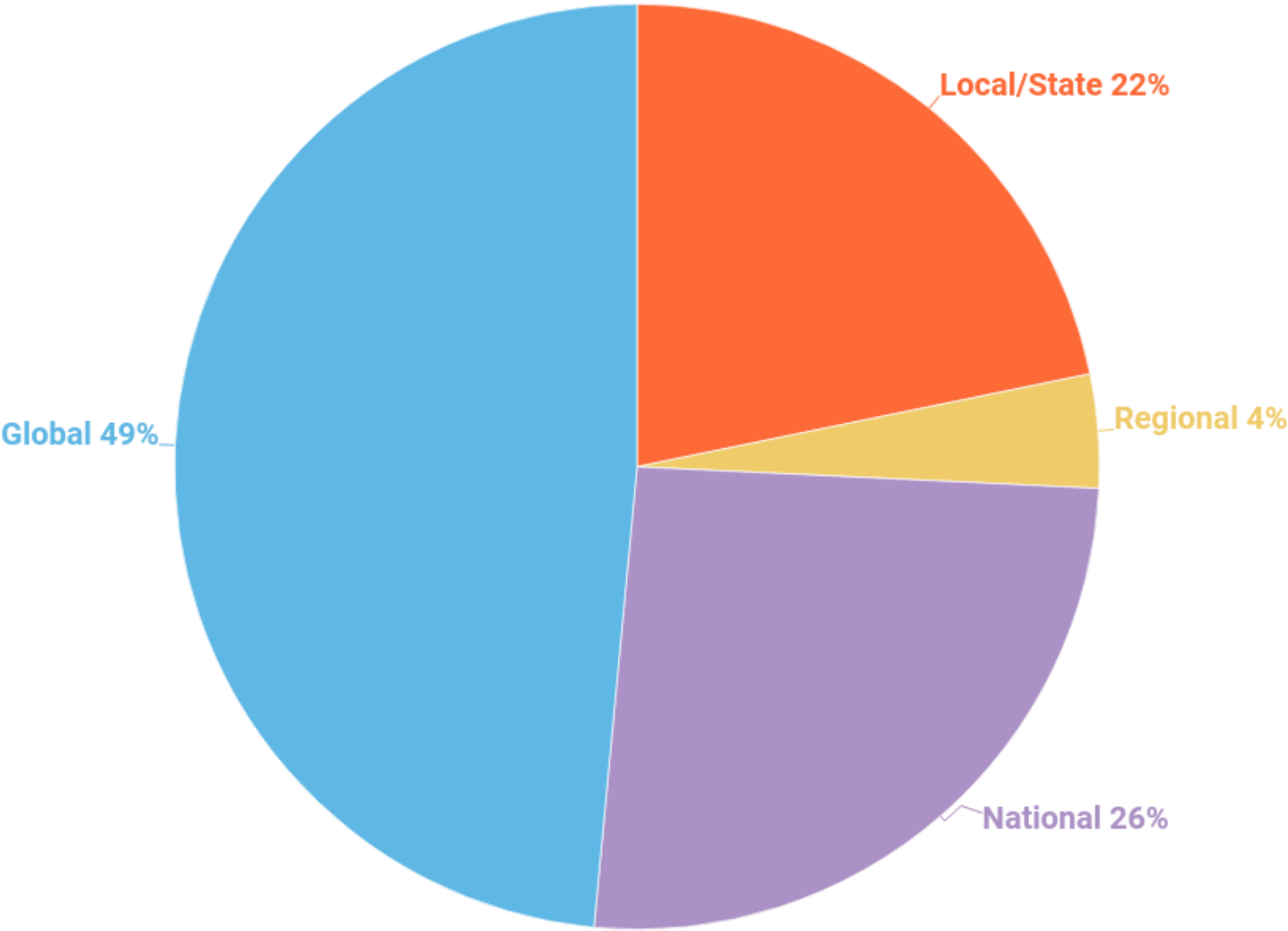
# Respondent Profile

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## Association Type

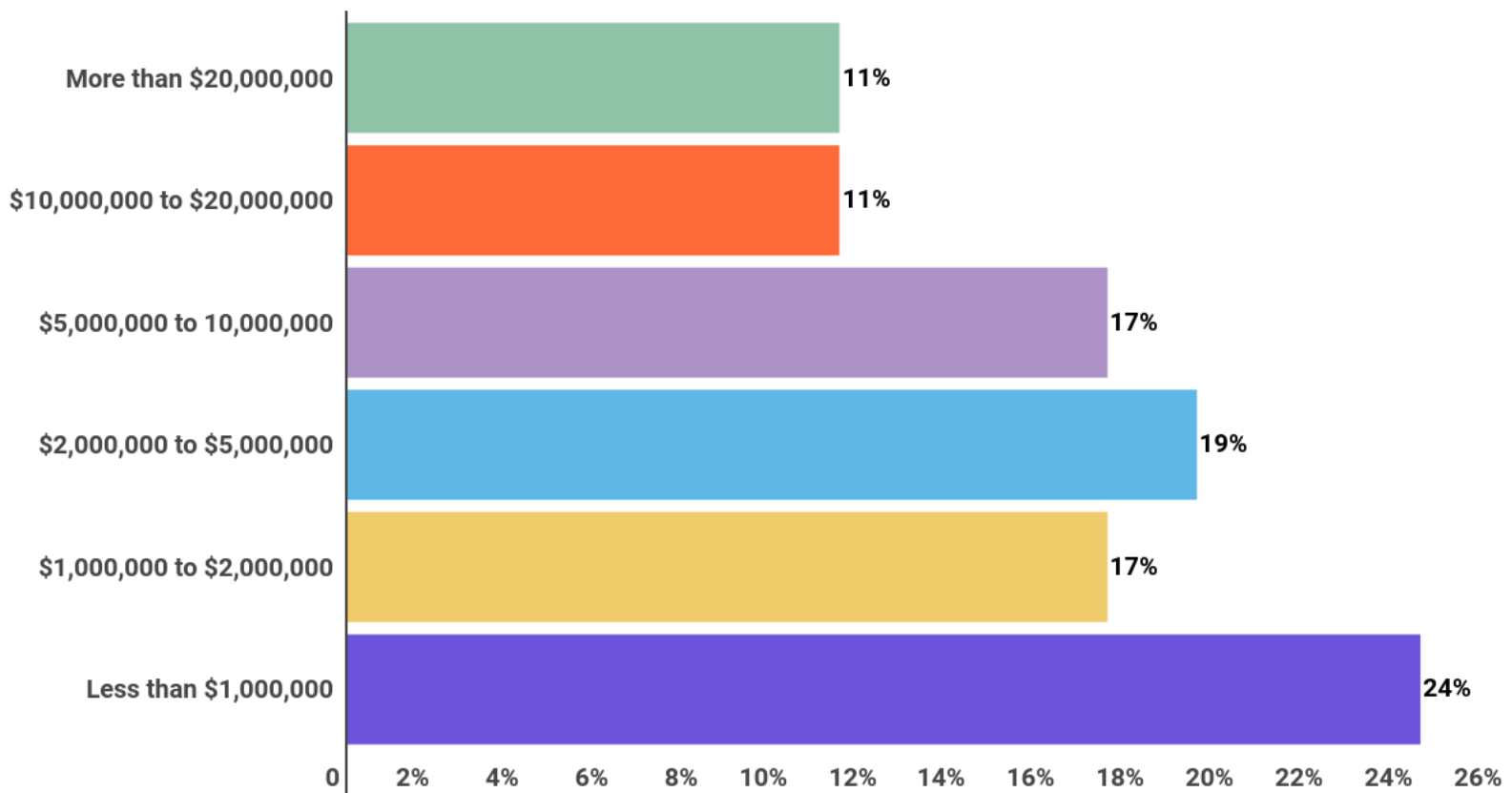


# Association Reach

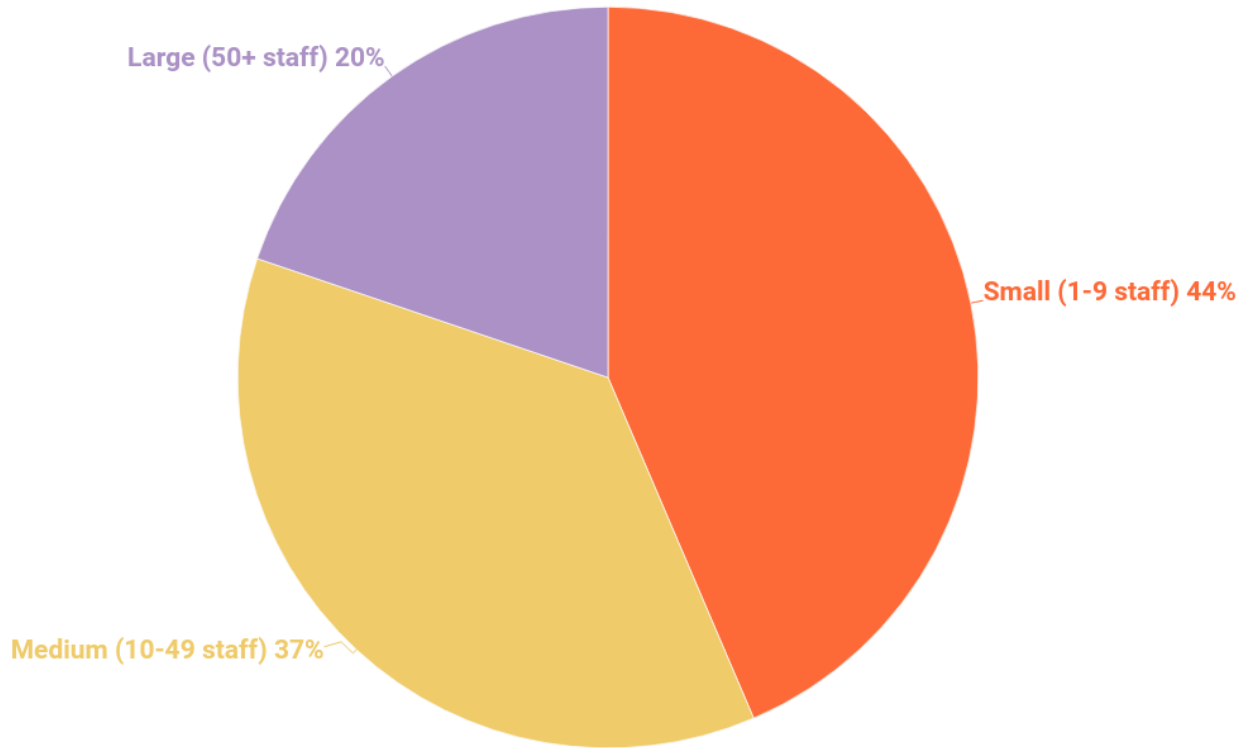


# Association Size

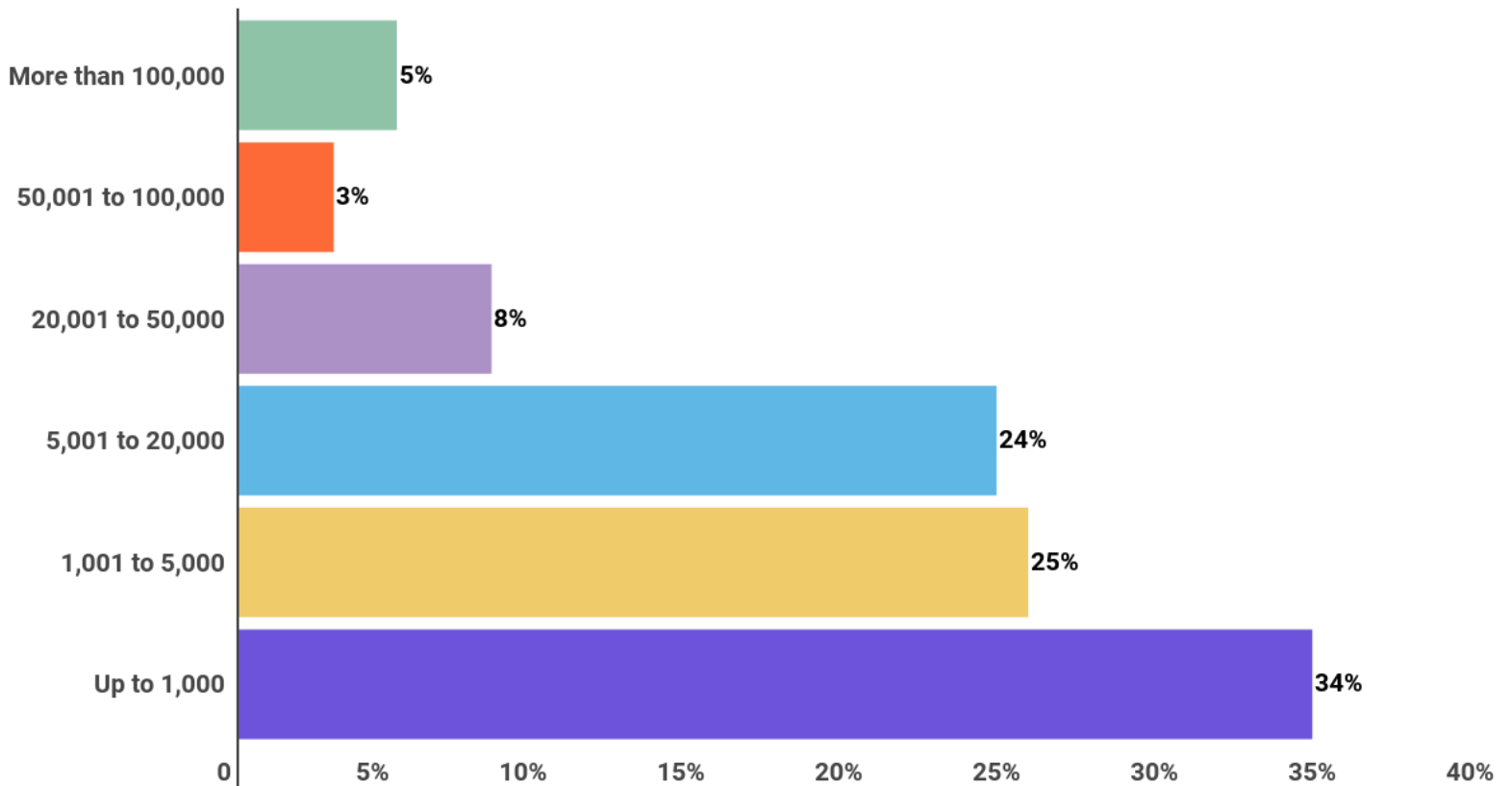
## Association Size by Annual Revenue



# Association by Staff Size



# Association by Member Size



# About the Survey

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307 association leaders contributed data from April - June 2022 on the Dynamic Benchmarking Platform. Many of the questions from the 2018 study were reused for this year's survey for comparison reasons. These questions were generated initially from input via thirteen 1-hour phone interviews with association leaders who had fully implemented successful new member engagement programs.

Some original questions and answers were updated based on input from specific questions asked in the ASAE Collaborate, Community by Association, Answers for Associations, and Association Chat forums. A total of twenty-five responses were collected from these forums. The Dynamic Benchmarking platform is a secure third-party software that abides by anti-trust laws. It provides users with an environment that allows for psychological safety and, thus, the ability to provide honest feedback.

## NEW MEMBER ENGAGEMENT STUDY