



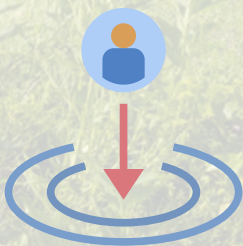
# Membership Engagement & Mentoring Program

New member onboarding is critical to retention. Statistics show that it costs 7x more to obtain a new member than to retain a current one and that first-year members have the lowest renewal rates.

Onboarding is more than simply sending out a welcome packet and adding them to our Chamber's email list – it's an ongoing process that relies on deliberate communication and engagement.

## Why New Member engagement is crucial!

### IMPACT



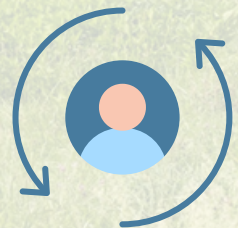
**They are New,  
Excited &  
motivated**

### ATTENTION



**We have their  
attention & one chance  
to set the expectation**

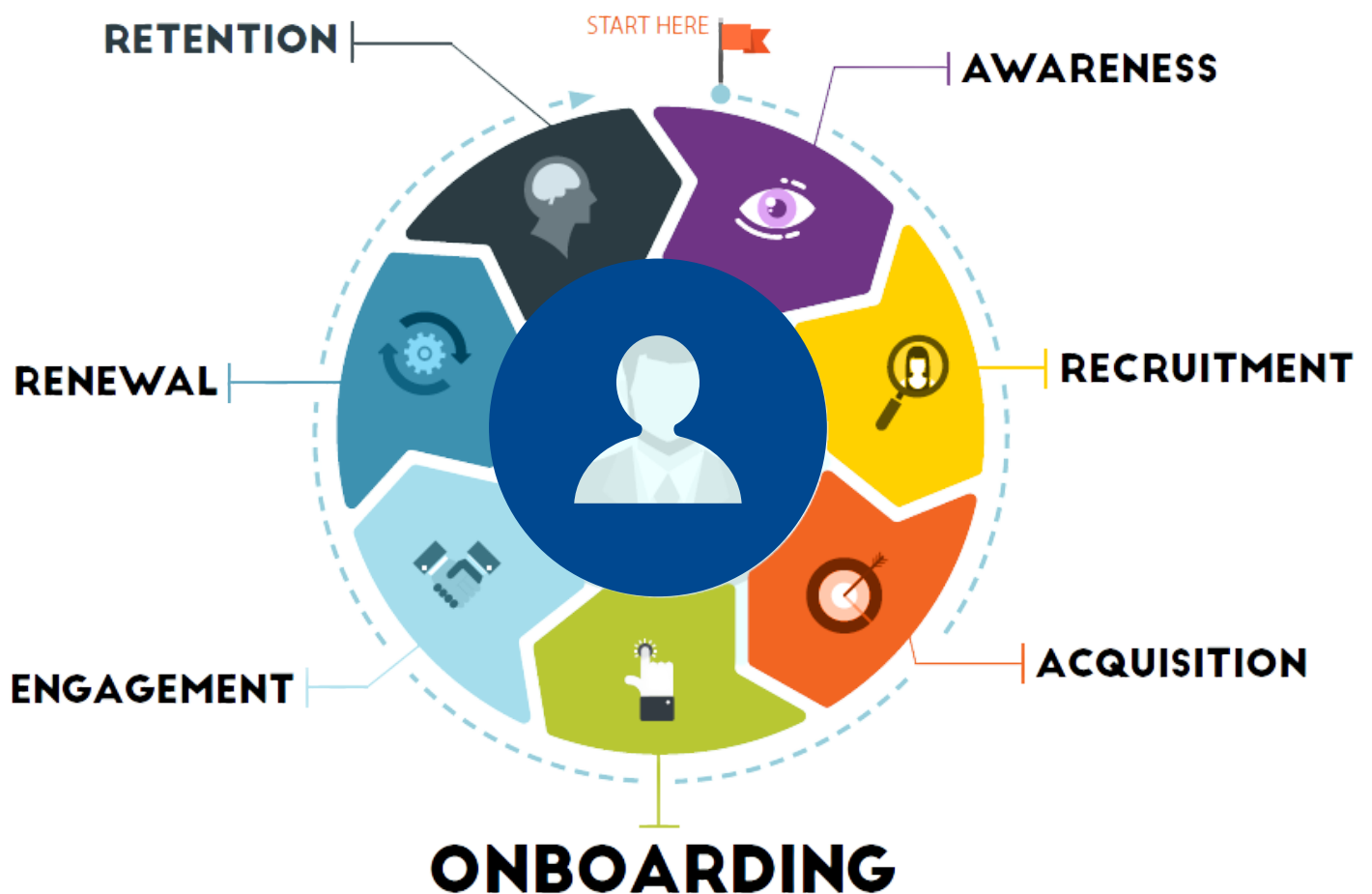
### RETENTION



**First Year Members  
have the Worst  
Retention Rate**

# Membership Lifecycle

A process through which new members move from being organizational outsiders to becoming organizational insiders.





The membership engagement & mentoring program is designed to help members **maximize the benefits** of their membership by providing educational information about what the Chamber has to offer and **guiding them towards opportunities** that will bring them the best return on their investment of time and money. It is important for **new members to feel they have joined a quality organization** that cares about their success. Having a Chamber mentor helps them accomplish this goal.

## **QUALIFICATIONS**

- To be current members of the Chamber.
- Member business is current on their dues.
- Participate in scheduled orientation.
- Attend 8 monthly Ambassador Committee meetings.
- Attend and/or volunteer at a minimum of 3 Chamber Programs & Events/quarter.
- Always promote the Chamber in a positive manner.
- Attend new member luncheons and ribbon cuttings whenever possible.
- Make membership referrals as often as possible.

## **PROFESSIONAL BENEFITS**

Through your participation in the Membership Engagement program, you will enhance your career through strategic networking. You will be introduced to our new members before anyone else, and those connections can enhance your professional visibility in the business community. Your knowledge of the business community will automatically grow. While attending events and volunteering, you are increasing the visibility of both yourself and your business, potentially expanding your own client base.

Once you volunteer to be a mentor, you will be given a Mentoring Packet that will include all the tools to be successful. It will be your responsibility to keep your supplies updated. As a mentor, you will help the new member develop an action plan to ensure their success. The best way to accomplish this is to listen and then discuss what their expectations are with regard to how the chamber can help them select those events, marketing opportunities or committees in which they would like to participate.



## **MISSION STATEMENT**

“The mission of the Engagement Committee is to serve as goodwill representatives for the Fauquier Chamber of Commerce by welcoming new members at ribbon cuttings, grand openings and other Chamber events. Committee members will work with Chamber staff in providing value for our existing members, and actively assist in recruitment and retention efforts on behalf of the Fauquier Chamber of Commerce.”

Members receive special attention from the committee through attendance of ribbon cuttings, VIP and other events. The business community, in return, benefits from a stronger and healthier Chamber with a strong base of sustaining members. All of this enables the Fauquier Chamber of Commerce to stay focused on the issues that positively impact our county's growth. This program also provides exposure to those companies and individuals whose representatives serve on the committee.

## **DUTIES & RESPONSIBILITIES**

Committee members are asked to wear their Chamber issued Name badge when they are functioning as an official representative of the Chamber. There are three specific areas in which Ambassadors are asked to officially represent the Chamber. These are listed in the following section in detail:

- Chamber Activities
- Member Retention
- Member Recruitment

The Annual Checklist helps each committee member to track their Chamber involvement and is required to maintain eligibility.

At any event it is the responsibility of the committee member to sign-in, or make contact with the Chamber staff if there is not a sign-in sheet, to ensure that their attendance is recorded.



## **WELCOME TEAM**

To remain a committee member in good standing you must participate in the following in each 12-month period:

- Attend Committee Meetings (must not miss 2 in a row or 4 in 12 month)
- Attend a Greet & Meet New Member Event (twice a year)
- Attend 75% of Ribbon Cuttings
- Attend 75% of any monthly networking events i.e. Lunch & Learn, After 5, etc.
- Provide referral of potential members to the Chamber staff, including contact name and information
- Recruit a minimum of one new member annually. Chamber staff will assist as needed
- Help staff as requested with events, etc.
- Committee members not meeting the requirements for 90 days will be asked to step down and are welcome to re-apply when their schedule permits
- Committee members inactive for 60 days will be released from status and their responsibilities.

## **MEMBER RECRUITMENT**

A key function of Engagement committee Members is to help identify business owners who would benefit from more community involvement through Chamber membership and invite them to join. Committee members should be aware of membership benefits and privileges so that they can extend the invitation when appropriate.

Feel free to call the Chamber office with any questions you have about member services so that you are equipped to answer those same questions from others as you go out into the community. Membership packets and information are available at the Chamber office at any time for your reference or for a potential member. You are expected to be the eyes and ears in the community, providing the Chamber staff with leads that allow follow-up.



## **NAME BADGES**

You are encouraged to wear your badge to all Chamber functions and events. This is the primary identification of your official affiliation with the Chamber and is especially important when you go on recruitment or retention visits. It is helpful for other business professionals who are looking for direction at an event or perhaps have a question about membership, to see (as well as hear) that you are an official representative of the Fauquier Chamber of Commerce.

First name badge is provided, if a replacement is needed the cost is \$20.00. If you are not at a Chamber-sanctioned event or activity, please do not wear your official Ambassador Name badge, unless you are meeting with a prospective member.

## **PARTICIPATION**

The Membership Director or Team Leader will keep track of attendance throughout the year, it is the responsibility of the Ambassador or Ambassador in Training to check in with the Membership Director to ensure attendance is recorded accurately. Documentation will be provided at the monthly Ambassador meetings for each Ambassador's current attendance standing.

## **ENGAGER OF THE MONTH**

is designated to one ambassador a month and will showcase that person and their business. This will be shared on the Chamber Facebook page, Weekly E-Blasts, and posted on our website.

## **ENGAGER OF THE YEAR**

will be awarded to the member who consistently goes "Above & Beyond" when representing the Chamber. Recognition as the Engager of the Year is tied directly to the annual participation and engagement within the chamber. The winner will be recognized and presented with the Engager of the Year award at the Annual Gala.



# Onboarding & Touchpoint Schedule

Member onboarding involves more than a checklist. A touch plan to improve onboarding and engagement builds a strong foundation for long-term membership.

Onboarding is a process that is worth investing in. Use this timeline as a guideline to help new members become engaged with your organization and build a membership meant to last.

## Onboarding Process

When an application is successfully submitted, the following workflow is activated.

**1**

Applicant receives an acknowledgement message to the email address used on the application. Chamber staff will contact applicant to personally acknowledge receipt of the application and to tell them when the next Board meeting is scheduled. Any questions will also be address at this time.

**2**

Upon approval by the board of directors, Chamber Staff will contact primary representative to welcome them and provide information on next steps



# The Fauquier CHAMBER

Better Business. Better Community.

**3**

**An invoice is issued and once payment is received, a New Member Packet is mailed. This packet includes:**

- *Welcome Letter*
- *Ribbon Cutting Checklist*
- *Leadshare Information*
- *Guide to Setting Up Your Online Directory*
- *Partnership Program*
- *Event Sponsorship Program*
- *New Member Certificate*
- *Chamber of Commerce Door Cling*

**4**

**An invitation is then sent via email to all member representatives inviting them to the next scheduled Greet & Meet New Member Event. When the new member attends the event, the date and registration information is recorded.**

**5**

**At the 6 month anniversary, a web stat report is sent to the primary representative**

*The Web Stat Report contains:*

- *Web analytics*
- *Event Attendance*
- *Correspondence*
- *Membership Information Center Activity*



**6**

**At the 9 month anniversary, the primary representative is contacted by a member of Chamber Staff**

*During that contact, the following is discussed.*

- Answer any questions
- Any Events to Promote
- Is the member interested in any Partnership or Sponsorship opportunities

**7**

**At the 11 month anniversary, the primary representative is asked to participate in a member survey.**

*The survey includes the following questions:*

- How long have you been a Chamber member?
- How many people are employed by your company/business?
- What category does your business/employer fall in?
- How do you stay connected with the Chamber?
- In the past year, which of the following events have you attended?
- Which event is your favorite?
- For events you do not attend, what is the primary reason?
- What is your preferred form of communication about upcoming events?
- You use your Chamber membership mostly to:
- Do you utilize any of your Chamber benefits?
- Which Chamber benefits do you use?
- How satisfied are you with the responsiveness and quality of work of the Chamber staff?
- What does the Chamber do that you most like?
- What is the Chamber not doing that you wish it would do?
- What type of business or facility would you most like to see added to the Chamber?



# Touchpoint Schedule

Chamber Staff will send email to committee member and Board when a new member joins the Chamber. It is up to each to determine whether they want to email, call, send a note or visit the new member. But, reaching out can only add to your professional (and personal) connections. The more connections a new member has with the Chamber of Commerce, the more likely they are to renew.

## 1 WEEK

- WELCOME new member in person, email or phone
- BEST PRACTICE - When you reach out to the new member, be sure to inform Chamber Staff so that contact can be recorded in Chamber Master. You are encouraged to tell their membership story and ask questions of the new member. Sample communication script is provided below.

Hi “\_\_\_\_\_”. My name is \_\_\_\_\_ and I’m an Ambassador with the Fauquier Chamber of Commerce.

I want to welcome you to the Chamber and see how things are going so far.

### Live:

- How are you doing, how’s business?
- What prompted you to join the Chamber?
- Have you attended any Chamber events so far? I plan to attend \_\_\_\_\_ if you’d like to meet up there.
- One thing that really helped me feel connected to the Chamber when my business joined was \_\_\_\_\_ (joining a committee, attending networking events, being part of a micro-group, etc.)
- Thank you for your membership.
- Here’s my business card. Don’t hesitate to reach out with any questions or concerns.

### Voice Message:

- I hope you’re doing well and that business is good.
- I would like to be a resource for you and introduce myself in person, would you be able to meet me at the next Chamber event on \*\_\_\_\_\_? If not, maybe we could meet for coffee or I could stop by your office?
- I look forward to meeting you, I’ll also send you an email, so you have my contact info.



## **MAKING CONTACT**

Contact your mentee, introduce yourself, your business and your roles as a member of the Engagement committee for the Chamber of Commerce.

## **MEETING SUGGESTIONS**

- Meeting during the day at their office, the Chamber conference room, if available, or other mutually agreeable locations.
- Come early and plan to meet before a Chamber event; plan breakfast, lunch, dinner or get together for coffee.
- As a last resort, arrange a phone meeting. If you have to leave a message, include all your contact information and follow up with an email or letter explaining your intentions as related to mentoring the new member.

### **1 MONTH**

- ASK if they have logged into their member portal and set up their directory
- BEST PRACTICE - let them know that our online business directory receives approximately 175,000 impressions per year

## **STAYING ENGAGED**

Your role does not end after your initial meeting with the new member. You need to stay in touch with them. Send monthly emails reminding them of upcoming events they may be interested in attending. Let them know which events you are planning to attend. Make an effort to check in on how their business is doing. In general, be proactive and available for your mentee.

### **2 MONTHS**

- ENGAGE by visiting their business, invite them to yours or simply have lunch

### **3 MONTHS**

- CONTACT chamber staff to see the member's level of event participation
- BEST PRACTICE - ask them if they have downloaded and used the MembersPlus App



## **BEST PRACTICES & RESOURCES**

- Help them select some events to attend.
- Make sure they have a clear understanding of what the chamber can do. Managing expectations at this stage is a lot easier than handling someone who cancelled because they thought paying dues would equate to a revenue stream for their business akin to winning the lottery.
- Encourage them to volunteer on one of the Chamber committees; if there is an interest, pass their business card and the name of the committee on to the Chamber staff.
- Suggest they attend one or more of the weekly Leadshare Groups to see which one might best suit their overall needs and assist in developing an “Elevator Pitch”.
- Ensure they have plans to attend a New Member Greet & Meet Event.
- Encourage them to sponsor one of the monthly Chamber luncheons. The cost is minimal for the amount of exposure they will gain.
- Provide a high level summary of why you joined the Chamber and how it met or exceeds your expectations
- Learn about them and their organization. Ask them what is their definition of success.
- Ask members what they need most in their business and then try to fulfill as many wishes as you can by doing it yourself or working with others to make it happen.
- Share your goals for the upcoming year. Ask for feedback.
- Review the Year in Review Report showcasing the growth of business exposure
- Listen to members on social media and share some of their news, discounts, or events.
- Ask members what they would institute if they were chamber CEO. Asking an opinion and listening to the answer is a very good way to make people feel a part of the organization.
- Don't just work on making introductions between members, help them discover new friends.
- Reward people who are making a difference in your community even if it's only a small treat. Acknowledging someone's efforts feels good to you and the recipient.
- Share humorous posts and memes. Sometimes people need a break from the world.
- Ask them what they wish they could do as part of their business. This may give you an idea of their interests and how the two of you might work together in a more inspiring way.



## **RESOURCE LIBRARY**

Like anything else in this world, without the right tools, most tasks are not possible. You play an integral role in the success of the chamber therefore we will provide you with all the tools you need to succeed.

- Why Join Infographic
- The Benefits of Leadshare
- Membership Application
- Chamber Contact Cards

The MembersPlus App is a very valuable tool for all members but particularly yours. Not only can you view and register for upcoming events, you can also use the directory function to vet members on whether they are members or not. Additionally, with access to the most recent membership list, you are ready at all times to make referrals to member businesses.

- Instructions on how to download the app
- User guide for getting the most out of the app

## **REPORTING**

When you are out building relationships, you are going to meet people who want to join your chamber, volunteer, get more involved, switch membership levels, sponsor events, and a host of other things.

Therefore Chamber staff needs to make accommodations that allow you to quickly, intuitively and effortlessly convey information back to staff

- Dedicated form for you to upload all information
- A Facebook page dedicated exclusively to committee members to use for not only posting information but also sharing best practices for others to learn from.

# ENGAGEMENT MEMBER CODE OF CONDUCT

As a Member of the Fauquier Chamber of Commerce, I recognize that membership is a privilege and that a membership brings with it the responsibility to assure that all members understand and commit to the following code of conduct.

The code of conduct shall, without limitation, require members and all participants of Chamber-sponsored programs to:

- **Refrain from publicly disparaging the business practices of fellow members and refrain from condoning or engaging in misrepresentation or unethical practices.**
- **Conduct business and professional activities in a reputable manner so as to reflect honorably upon the business community and fellow Chamber members.**
- **Respect the reputation, profile, and status of the Fauquier Chamber of Commerce, and represent the Chamber accordingly.**
- **Understand, support, and promote the Mission of the Fauquier Chamber of Commerce and cooperate with fellow members in the application of this Code of Conduct.**
- **Whenever reasonably possible, participate in the functions and activities of the Chamber, and promote the enhancement of business growth within Fauquier County.**
- **Observe the highest standards of ethics in rendering services and/or offering products for sale, based on the members' own knowledge and expertise.**
- **Refrain from engaging in any practices prohibited by law or seeking unfair advantage over fellow members and conform to all laws established by Municipal, State and Federal governments for the control of said business, where applicable.**
- **Respect the role of the Chamber staff.**
- **Protect the integrity of the Program.**
- **Networking with your Chamber Member is encouraged; using engagement calls to promote your business is prohibited.**
- **As an Engagement Committee member, you recognize that you are a co-partner in the important work as a volunteer to improve the economic and civic life of the community through the Chamber. You have assumed a position of public trust. You should disassociate your personal interests from Chamber activities.**
- **The Fauquier Chamber of Commerce strives to maintain an environment that is free from discrimination and harassment. Any member who engages in discriminatory or harassing conduct (verbal or physical) is subject to removal.**
- **If two complaints are received regarding your conduct, your status will be terminated.**

I also understand that the failure to adhere to the professional and personal obligations of the Fauquier Chamber of Commerce, as outlined above, can result in the termination of my/our membership.



# ENGAGEMENT MEMBER AGREEMENT

Ambassadors represent one of the most important volunteer groups within the Fauquier Chamber of Commerce. As a member of the Engagement Committee, I am responsible for assisting in maintaining open lines of communication between the Chamber and its members.

While they may enjoy the privilege of expanding their business contacts, as a representative of this committee, they are responsible to refrain from exploiting this privilege or these contacts and will not add other members to their customer contact list without their permission.

Committee members should be exemplary in their business ethics and practices, are expected to be active in Fauquier Chamber of Commerce activities and should familiarize themselves with all aspects of the Chamber to truly be recognized as a representative of this organization.

I have read the above obligations of the Fauquier Chamber of Commerce Engagement Program and pledge that I will fulfill these expectations to the best of my ability. I understand that if I do not meet the participation guidelines outlined in the Member Code of Conduct and the Membership Engagement & Mentoring Manual, I can be removed.

Signed: \_\_\_\_\_

Business: \_\_\_\_\_

Date: \_\_\_\_\_

Please submit this signed agreement to:

321 Walker Drive  
Warrenton, VA 20186