

New Member Onboarding Checklist

What to do before the first meeting, in the first month, and by day 90 – so new members actually stay.

New member name

Sponsor / mentor

Join date

Checklist owner

Before their first meeting

- ☐ Application approved and dues invoice sent (make paying easy – online if possible)
- ☐ Welcome email sent: meeting schedule, what to expect, who will greet them
- ☐ Sponsor or mentor assigned and introduced by email
- ☐ Added to the roster, email list, and club app or portal

At their first meeting

- ☐ Greeted at the door by name and seated with their sponsor
- ☐ Introduced to the club (brief – name, what brought them, one interesting thing)
- ☐ Given a welcome packet: club calendar, officer contacts, committee list
- ☐ Two or three personal introductions to members with shared interests

First month

- ☐ Committee interest conversation – where do they want to plug in?
- ☐ Signed up for a specific role at an upcoming event or project
- ☐ Formal induction or recognition completed (if your club does one)
- ☐ Sponsor checks in after each meeting: questions, introductions still needed

By day 90

- ☐ Holds a named role: committee member, event job, or project task

- ☐ Has attended at least one service project or club event beyond meetings
- ☐ One-on-one check-in with membership chair: what's working, what's missing
- ☐ Asked for one referral: 'Who else should be part of this club?'

Tip. The strongest predictor of second-year renewal is whether a member did something in year one. Get their name on a task before day 90.