

Appendix C: Communication Templates

New Member Onboarding

EMAIL INTRODUCING THE NEW MEMBER TO THE GROUP

Dear <GROUP NAME>!

It's my pleasure to welcome <NAME> as the newest member of <GROUP NAME>!

<INSERT A BRIEF BIO – THREE SENTENCES>

- Name + Title + Organization
- Description of person's job function
- Description of typical client

Here is more about <NAME>:

- <INSERT LINKEDIN PROFILE LINK>
- <INSERT CONTACT INFO FROM EMAIL SIGNATURE>

<PERSON'S NAME> – we'd like to formally welcome you to our amazing family! We're thrilled to have you as our newest member.

Welcome!

<GROUP LEADER>



EMAIL TO THE NEW MEMBER

Hi <Member Name>,

I'm connecting you to <NAME>, our Mentor Chair for <GROUP NAME>, who will help you get up to speed with our group specifically and ProVisors in general. I'm also cc'ing our group's Executive Committee since they're a resource for everyone, and in particular, new members.

Here's who's on our EC:

- Group Leader: <NAME>
- Group Leader Assistant: <NAME>
- Host: <NAME>
- Troika Master: <NAME>
- *Any Other EC Roles Your Group Has*

I'm also including a New Member Onboarding Checklist that you can use to drive your onboarding and orientation process. I encourage you to work through those items in the next 30 days so you can maximize your membership.

As you'll see on the checklist, the first action is to schedule an introductory call with <NAME>, our Account Manager from ProVisors Headquarters in Sherman Oaks – see if you can do that this week!

I'm always available if you have any questions.

We're thrilled to have you join our group!

<NAME>



ONBOARDING CHECKLIST FOR NEW MEMBER

Instructions: Edit the <FIELDS> below, then copy and save as a PDF or MSWord document to share with your new members. This is a TWO PAGE document – be sure to include the “important fields” information on the next page.

Welcome to ProVisors!

The following is intended to be a self-guided checklist to help you navigate the onboarding process. We recommend working through it within your first 30 days to maximize your membership. If you hit any roadblocks, please reach out to a member of our Group’s Executive Committee.

- Schedule an Onboarding Call with our Member Services Representative <INSERT NAME + EMAIL>.
- The Member Services Representative will provide a brief overview of the website (called “The Hub”) and how to navigate its functionality.
- Upload your profile into the ProVisors system. (See Page 2 for a checklist of the critical fields.)
- Connect with the Mentor Chair <INSERT NAME + CONTACT INFO> – by phone, video or (when things reopen!) in person. New members will be troika’d with <NAME> within the first several meetings.
- Attend an Accelerator Workshop within your first 60 days – this is critical for maximizing your membership. Here’s how to find one: <INSERT>
- Review the [Members Handbook](#) and our [Code of Conduct](#).
- Connect with your Mentor/Buddy to guest at another group’s meeting or attend an Affinity Group. Find a list of meetings [here](#) and use the calendar function on the Hub!
- Go out and create some new commerce – and some new friends and colleagues!



Your Provisors' Profile – Important Fields

Note: a recent, professional photo is one of the most critical aspects of your profile. We use it to announce your membership on LinkedIn and include you in the Accelerator newsletter. (We don't do either until we have a photo.) And most importantly, you'll show up on the photo lists with an image!

- ❑ Name and Title
 - First and Last Name
 - Certifications
 - Title

- ❑ Phone and Email
 - Call Me When (describe your ideal client/engagement)
 - Account Phone
 - Mobile
 - Email

- ❑ Demographics
 - Profession
 - Specialities (select 2-3 from the options that apply to you)
 - Company
 - Company URL
 - LinkedIn URL (make sure your LinkedIn Profile is up to date)
 - Colleges
 - Graduate Degrees
 - Short Bio (very important – max of 250 characters including spaces)
 - Full Bio
 - Clients
 - Services
 - Industries
 - Speaking Engagements
 - Social Clubs
 - Organizations
 - Charities

- ❑ Mailing Address

Billing Address

