



Member Onboarding Process

Member Onboarding

Member onboarding is the first step to long-term engagement. We are going to walk through the correct steps to on-board a member. When we establish member responsibilities and clearly explain Contractor University's role, we will retain members. During the on-boarding process, our goal is to understand the member's purpose for joining. We also want to map out the first year by identifying priority areas.

We need to ensure that we;

- **Have the correct contact information**
- **Have correct email addresses**
- **Know who will be the program administrator (often this is different than the owner)**
- **Understand preferred method of communication (email, text, phone)**
- **Frequency of how often the member would like to be contacted**

When welcoming a new member, the suggested script is as follows:

“ Welcome to Contractor University. We are glad you joined and look forward to helping you achieve your professional goals. After we gather some important information, I will walk you through all of your member benefits. ”

Official Internal Onboarding Process

First Phone Call (within 1 business day of sign-up)

Initial Verification

Verify that the confirmation email was sent to the contractor and the account information in Nimble is correct.

Email and Outreach

Send initial email from Account Manager and place first outreach phone call within one business day of signup

Password Reset

Confirm that the member's password was reset.

Email Confirmation

Ensure that emails from the Account Manager's email address are being received.

Also explain that they will receive another email in the next day or so (if they haven't already) from our marketing platform that will require them to open it up and click the link to verify they are receiving our announcement emails from our email distribution system.

Phone Number Confirmation

Ensure that the member knows the phone number of the calls coming from the Account Manager to make sure they realize it is not a spam call

Onboarding Worksheet

Explain the onboarding worksheet and ask them to complete it within a week

Schedule Site Demo

Explain the next step of conducting an official site demo and set that appointment while on the first call

Second Phone Call (within 1 week of first call)

Review Onboarding Worksheet

Ask for and review the completed onboarding worksheet from the member.

Membership Demo

Complete membership demo following the demo process checklist and offer the business evaluator link. Check Nimble notes to see if the business evaluator was completed with roadmap delivery (during the trial process) and see if they have any questions or need any help.

Schedule Follow-up Demo Call (optional)

If the demo call is not completed due to time constraints, set a follow-up call to finish the demo while in this meeting

Schedule Check-In Call

Once the demo is complete, schedule another check-in call.

Offer Staff Training

Offer training to the entire staff on usage of the LMS and schedule while on this call.

Third Phone Call (within 30 days of sign-up)

Touch Base

Check-in to see how their overall experience is going and see if they have any questions.

Offer Assistance

Ask if any staff members are having issues with the platform and if there is anyone else in their company that needs to be set-up with access.

Marketing Emails

Confirm they are still receiving our marketing emails.

Offer Content

Deliver a timely/seasonal piece of educational content that may be of use to them (video, resource, article, research report, etc.)

Satisfaction Survey

Inform the member that there will be a satisfaction survey at 60 days and to please complete it so we can continue to improve our process

Financing Introduction/Handoff

Introduce the member's OPTIMUS representative on the call (**if they indicated they wanted to learn about OPTIMUS when completing the onboarding worksheet**) or follow-up after the third call with an email that introduces the member to their dedicated OPTIMUS representative.