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## TRANSCRIPT

# Catherine Hackney on Member Onboarding

### SUMMARY KEYWORDS

community, members, email, faq, platform, professional association, exists, online, onboarding, campaign, manager, organization, membership, engagement, series, reply, questions, specific, bit, actual

### SPEAKERS

Catherine Hackney, Anne Mbugua

#### **Anne Mbugua** 00:03

Hello, I'm Anne Mbugua with the Community Roundtable. I hope you enjoy this conversation, our lessons from the community manager handbook series.

#### **Anne Mbugua** 00:16

Hi, Catherine, if you can introduce yourself, what you do, and how many years you've worked in and with community?

#### **Catherine Hackney** 00:27

Yes, thank you. So I am Catherine Hackney, I started in the professional association world when I got into online community management for the first time. That was about nine years ago now.

#### **Catherine Hackney** 00:41

I was I started in the membership department of an organization that had an online community on the Higher Logic platform. And it had been around for several years and wasn't very active, and nobody on staff really knew how to manage it. So that is something that fell into my lap, and became the first real professional online community that I had experienced. So I learned very quickly, everything I could about the platform and about community management. And over a few years, I realized I really enjoyed online community management and thought that it was bringing immense value to the membership. And I wanted to bring that value to as many organizations as I could. So about five years ago, I went solo and became an independent consultant and started my company confident communities consulting. And that's what I still do today. All right, thank you, Catherine. So if you would briefly

describe a specific experience that you had with onboarding new members, I would really like to hear that story. And I'd really love to learn more about challenges you faced and lessons you learned. So if we could just jump into that, I would really love to hear it. Yeah, absolutely. Since I'm a consultant and work with so many different organizations, I'll leave organization names out of it. But the majority of who I work with are professional associations, and other nonprofits. So that's definitely the lens that I'm coming from.

**Catherine Hackney** 02:16

So with a all focus on one specific organization I worked with for

**Catherine Hackney** 04:44

So you've got a lot of your members who probably have just not used your community at this point in time. And I think that's normal for a lot you know, they may be seeing the emails and lurking a little bit but right even if they're getting the emails they may not have ever actually logged into the community.

## 05:00

Hmm, yeah, so that was, you know, obviously the big problem that we've figured out, and we're trying to focus on with a specific onboarding series. So it helps to talk to a group of members, as well as just kind of go through, like, what are past emails and questions that staff have already received from members about the online community. So we were actually using, you know, real questions, members, were asking us to figure out, what are the true frequently asked questions, you know, what do members not understand about the community? Where do they need some help? I think that is huge, right, actually talking to members and figuring out what their questions are, versus kind of just taking the template and forcing it to work, you know, the staff making those assumptions of like, oh, clearly, a member would want to know how to do this. Right? Well, maybe they don't, you know, maybe that's not as valuable as you think it is. And there's something else that a member cares about more. So definitely take that into account. And we did that. And like I said, we were using the Higher Logic platform. So that can definitely be complicated, right? There's a lot that exists within well, really any online community platform. Yeah, the discussion groups, you know, the actual conversations and profiles of members and networking through the directory, potentially, and library resources and searching for content. So there's lots of different things within an online community and ways that members can use it. So that's where we were using those FAQ series, onboarding emails to target one specific functionality of the community at a time, per email. So we kept it really short and simple. In each of our onboarding messages, and use those questions that members were asking about, like, hey, how do I find this thing? Or like, does this resource exist? You know, if those were the questions, and we had an email that was specific about search, and we went into, you know, like, here's where the search bar is, you know, we went very rudimentary. And, you know, gave a few tips and tricks and a screenshot of like the search results page, and, you know, there's filters and how to narrow your search results, and really pare it down to get exactly what you're looking for. So we, you know, just did the most basic information we could to make sure that it was really understandable to members always included one screenshot in the email as well, just to make it a little more visual. And we also made sure that the emails were from a real person. So at that point, right, it was my name my picture in the signature as the current Community Manager. In the Higher Logic platform, we were using their automation rules to send those emails. So we also made sure that the reply to field of the email

templates was my actual email address. I think often those things default to like a do not reply address or something like that. Right. So we wanted to be sure that members felt that it was coming from a real person. So it felt a little more personal, being really short and simple in the email, and like not overly coding it or you know, not making a crazy, like marketing, email level design. And making sure that if they replied, it actually got to me, we're, you know, really great ways that I was able to connect with members. And, you know, they asked other questions about the platform, then in reply emails back to me, and I was able to help them through that. And even if they weren't taking the actual action, listed in the onboarding, email, it got them interested, it got them to look at the community site, right, we probably got a login from the email. So that was, you know, what we were really hoping for. And with the organization that we did that with it, initially, we saw about a five and a half percent increase in active users fairly immediately, you know, after the first few months, it seemed to even make a difference if a member received one of those emails. So that was, you know, huge for us. It was great to help educate members on the platform. It also served clearly as a reminder that the community existed and they can check that out right and use that tool, reminding them of that member benefit. So you know, that like five and a half increase in active members pretty quickly was Just huge in my mind, right, we always say engagement is a marathon, not a sprint. And I really, you know, obviously believe in that. And I think if you have small incremental increases in engagement that's much more sustainable over the long term. So that's what I was looking for. And I was really happy with. And I will say, after we realized we had a good amount of success with it as an onboarding for just new members, right, we, we did decide to send the FAQ series to all existing members as well, kind of like a reminder of like, hey, the communities here, you know, you, if you haven't logged in, in a while, we would start them from the very beginning, or, particularly, like higher logics platform is very helpful for this, because there's a lot of criteria that you can use to say, right, like this person has already posted to the discussion. So they don't really need the FAQ email that's talking about how to make a post, you know, so if you can even get that detailed with data that you already know, you know, like, certain members are already active, they don't need this campaign. So just don't send it to them, you know, it's not necessary. So kind of figuring that out as much as possible, seem to be more effective as well. Because obviously, I think a lot of us always get the complaint of too many emails from associations to do, right. That's very normal. So certainly targeting it to those people who haven't taken the actions that are explained in the FAQ emails, is more ideal than just flatly sending it to everybody. Right.

11:46

So a few things that I would do differently about it, though, even though the we were seeing good success with it, I certainly feel like it could have been even more successful, right? If we had a little more time and a little more resources, and like, you know, the the stakeholder buy in of putting more into this specific initiative, I would have loved to do real AV testing, you know, of specifically subject lines or, and email templates within the body of the email. Right to figure out like, what is actually the most effective language in trying to explain things to members, you know, what's drawing them in the most, we didn't get to do a lot of that. So we just tried to simply keep the language as direct, concise, and simplistic as possible. But you know, there's always a better way, you can do that as well. Particularly, since every community has a different audience, you know, you want to, yeah, make sure it's going to work and resonate for your audience. So any testing that you can do there is just highly likely to help you out in that way. And make it more effective. I would also say that, it shouldn't be something that you just set and forget, right? We hear that. So I would certainly keep that as like a

regular task on my calendar to go back and even like quarterly, just review the actual campaign, like the timing that emails are sending and making sure they're sending to the right people looking at that data, as well as reviewing the email templates themselves. You know, even if you make little changes to your site, or maybe the platform provider has some enhancements or updates that they sort of force onto your site, you want to be sure that the description in the email of what you're explaining to members is exact, you know exactly what they're going to click and the language that they're going to see in your community. Right. And that the screenshot is up to date as well. Right. But you don't want to send them something that's a little too different. And just that's not a great user experience. So Right. Yeah, it is that kind of campaign that it's good to just quickly review regularly, you know, and make those small changes as your site changes, or even as member needs change, you know, have that targeted conversation with a group of members like annually, to still make sure the FAQs you're actually talking about in your email series are still their pain points. You know, things might change or new members as younger generations come in and are just, you know, really on top of technology, they can figure anything out. Maybe, right, you want to explain a little bit more about like networking with existing members or other pieces of how to get more deeply involved with that way. So it's certainly like those conversations and that reworking of it over time is something I would love to do differently.

**Anne Mbugua 15:00**

Wow, this, there have been a lot of golden nuggets that, you know, drop right there and spoken about which I really love. So I'm thinking of a scenario where, you know, it's a new community manager, probably the new community that has just launched, what's some of the pro tips that you would give them when they're thinking about onboarding new members?

15:22

Yeah, um, it is a few different things, I would say, you know, if you're a new community manager, and you're a team of one, I know, it certainly can be a lot of work, particularly if the platform you're on doesn't offer help with things like automated and targeted messaging to your community members. Depending on the size of your community, you know, if you have a smaller community, it might be worthwhile to personally send these emails from your own outlook, and make connections and be sure that educating of new members about your online community is happening some way, right. You know, even do just a few things like that. And at least, you know, you're also kind of introducing yourself as the community manager. So if the member has questions on the road, they'll at least recognize your name or your signature, right? If they've got issues, and then you need help. Yeah. So that's, you know, even just start with a few. And do it directly. If possible, you know, even if you have a unintegrated marketing platform that you can do some automated marketing through, that's not your community platform, right. You know, even if you can't target the emails, I still think particularly onboarding for all of your new members, is still worthwhile to educate them and explain the online community through a dedicated series. Right? I do want to say, I don't take any shortcuts, you know, it's better to give them less information than too much information, right, particularly in a single email. So it, it can be difficult to get away from, you know, a single onboarding, email the day a member joins, that just has eight or 10 Different hyperlinks to everything that exists in your community, or every different member benefit. So as much as possible, you know, break that up into smaller digestible chunks, and send that to members over time. You know, if you have the resources and more of a team and the technology, like automating it, and using criteria to target even different membership types with maybe different onboarding series

can be really great. If you have the capability to get really personal with it, that's awesome. I would also say I like to make the FAQ series campaign, one email per month, for the first full 12 months of somebody's membership. Yeah, cuz we know, the first year of membership is really the most important, right? You've clearly won that new member, now, it's a lot easier to get them to renew, than try to win a brand new member, right for your organization. So if you can keep them engaged and send that, you know, monthly reminder that the community exists and is of value to them. I also believe, you know, they're more likely to renew and stick around with you, because you're clearly demonstrating that value, and how they can you know, helping them use it. So it's, you know, member benefits only matter, or only a value if the members actually using it. Right. So yeah, I think this campaign is a good way to help, continue to nudge members, you know, and start with those easier tasks at the beginning and work your way up, you know, starting with just hey, login, check it out. And then like some things and search for some content, and you know, and work your way up to getting them to post and comment and put themselves out there. But yeah, if you really can build out onboarding to last the full year of their first year of membership, right, I see that as being the most effective. But again, that is certainly an area of opportunity to gather more data on right and really certain of that, right and, and have maybe a control group, which is difficult to me, because we're so we so much want engagement, but you certainly could have, you know, a group of new members that don't get the campaign or get something different, or you know, what you're currently doing, they continue to get the existing campaign. And then the other group of new members go ahead and give them the updated FAQ onboarding series. And look at those differences. I mean, that would be great to see the data, but at the same time, I'm like, Oh, I just want everybody engaging as quickly? So it's even a little bit hard to say, Oh, don't send the new campaign to some people. But certainly, you know, that is how you're going to prove that it's working to the stakeholders.

**Anne Mbugua 20:14**

Yes, I absolutely agree. Well, I really, really love you sharing about your onboarding experience, because there's so much there, you know, that oftentimes, we think about, yes, I do want new members to start engaging and engaging quickly, you know, and it's easy to forget them also to you know, once they're on boarded. Absolutely. I usually like to end with this question, which is what inspires you about the communities you have been part of, or the communities that you work with?

20:48

Oh, yes. What inspires me about online communities, is, honestly the value that I get out of being a member of communities. I'm a member of several four community managers, you know, fever, BCM, X, higher logics, user group community. And through those communities, I've actually met, you know, a handful of other community managers who do similar work that I do, and have, you know, the level of experience that I do or more, and we've been able to build our own little kind of private online community and slack. And that's just obviously, like the best connections I've ever made, and the, like, best networking and support system and in the professional world that I could hope for, and I don't think that that's something, you know, if you're a community manager, and often we're a team of one, there's nobody else who's really in your position at your organization. Or if you're a consultant like myself, it's a little bit lonely. So community has definitely brought value to me as a way to connect with my peers, and learn through other people as well, which is just invaluable. So I really love the fact of being able to bring that level of help and assistance and connectivity and sense of belonging to the

members of the communities that I work with. And that's why I love working with professional associations and, you know, industry specific communities versus like, a support customer support community. Those professional connections that people can make through their online community in their industry will just take them so much farther than they would have been able to get in their own individual careers. Then if they didn't have that community, so that's usually what I love seeing and just want to see more of

**Anne Mbugua** 22:51

thank you so much, Catherine for sharing your wealth of experience with us and your expertise.

22:57

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