



Using Automated Emails for Onboarding and Retention

My Chamber in a snapshot.

I am Ladona Weathers, Member Services/Communications Director

- Established in 1974
- 500+ Members
- Serve as Chamber of Commerce and Destination Marketing Organization
- Staff of 4 ½





In 2018, we identified the challenge of a growing membership that we needed to engage on a regular and ongoing basis...but our time and human resources were not also growing.



How can engagement with members be valuable, yet not time consuming?

- What do members need to know to not only be retained, but also to increase their investment?**
- What resources are available?**



- **What do members need to know to not only be retained, but also to increase their investment?**
- **Services available**
 - **What's in it for them?**
 - **Opportunities**
 - **What we're doing on their behalf**



→ **What resources are available?**

- **Our Membership Software (Chamber Master)**
 - **Groups/Lists**
- **Mass Emailing System (Constant Contact)**
 - **Automated Options**

New Member Onboarding

Engage & Show Value



How it works...

Utilize Groups in Chamber Master and Sync with Constant Contact Groups

Create group in Chamber Master.

Constant Contact:

- 1) Create Automated Email Series
- 2) Choose “trigger when someone is added to list”
- 3) Set series trigger to number of days.
 - Immediate
 - Wait 30 days
 - Wait 30 days
 - Wait 40 days
 - Wait 50 days
 - Wait 120 days
- 4) Review Content Annually



Campaigns

Contacts

Reporting

Sign-up Forms

Websites & Stores

Social

Integrations

Library

Campaigns [View All](#)

All

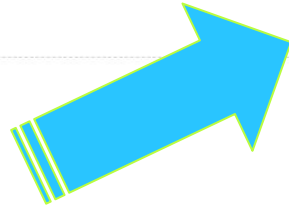
Profile

Most Recent

Active

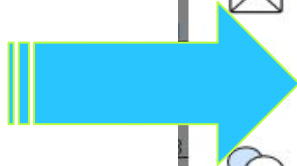
Ideas for Civic/Social/Membership ...

[Create](#)











25% complete

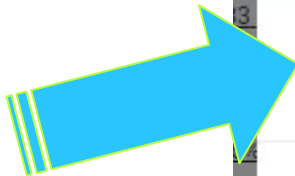
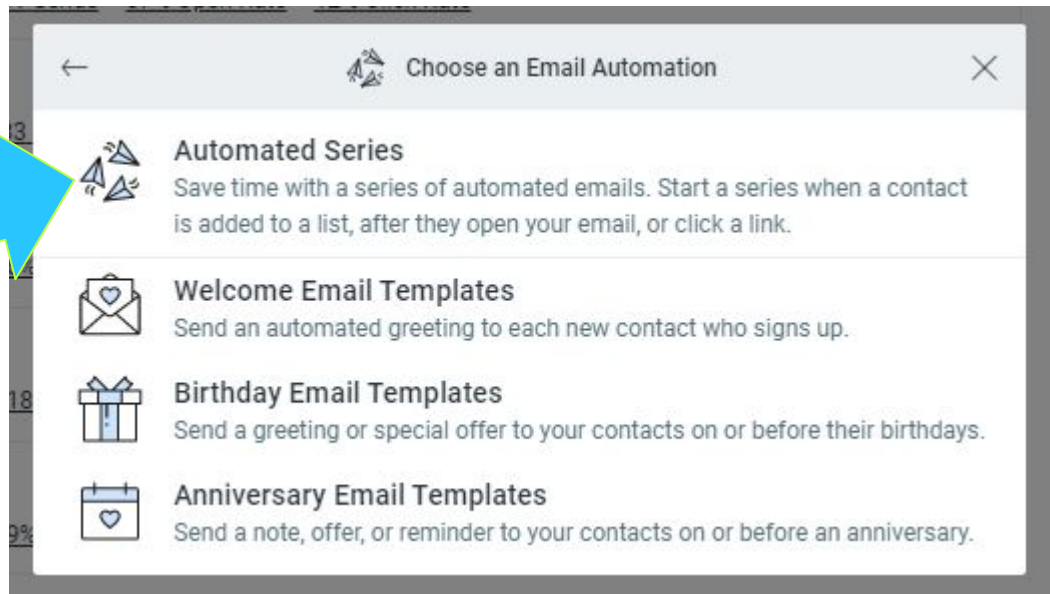
[Finish your profile](#)

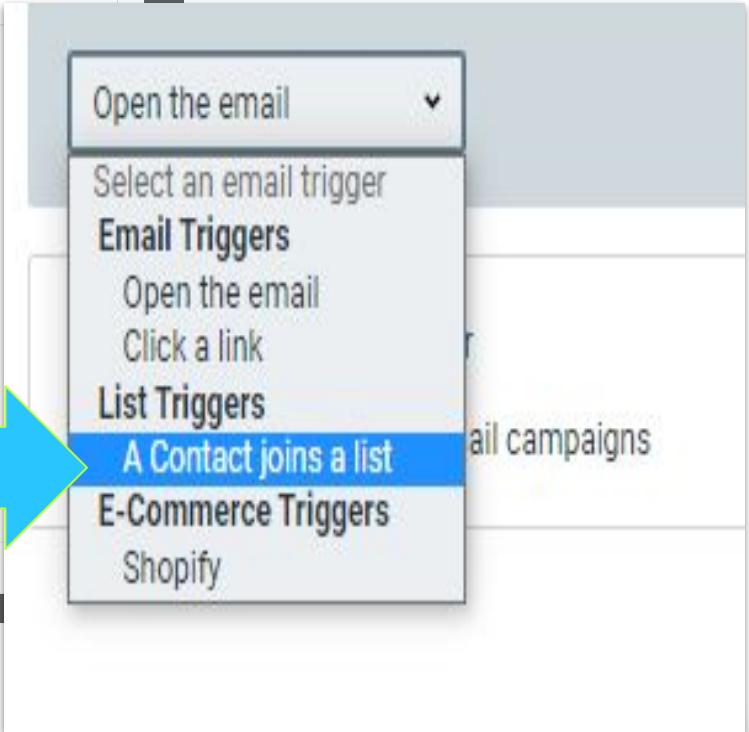
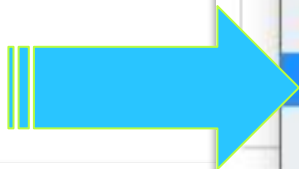
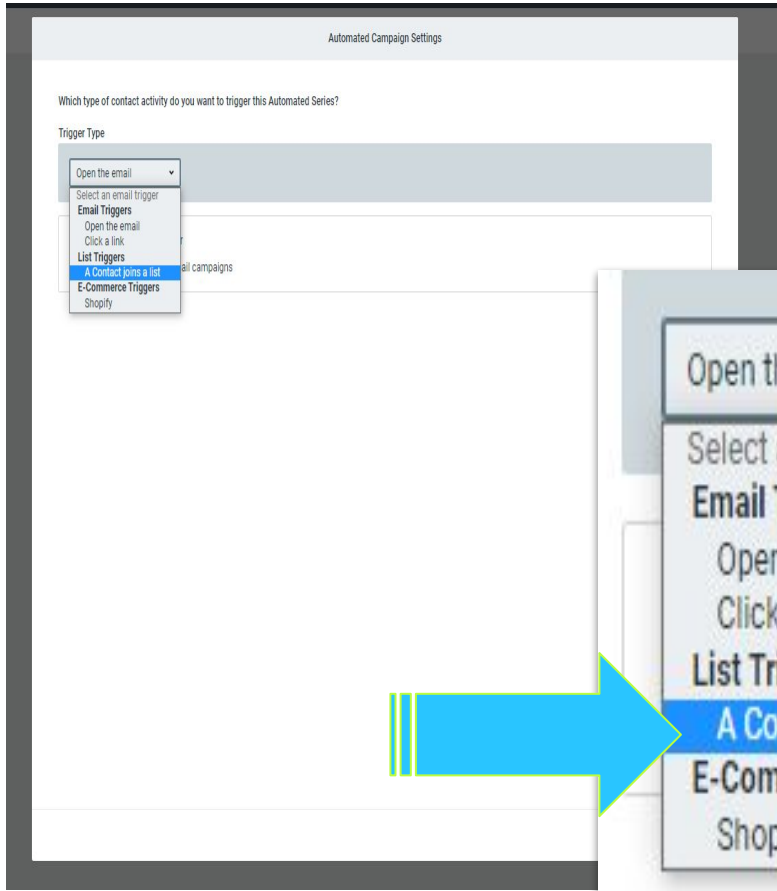


Create

Choose a campaign ✕

-  **Email**
Create professional emails to send to targeted groups of your contacts.
-  **Email Automation**
Send emails automatically when users click, join, or purchase.
-  **Social Post**
Get the word out wide. Post to all your favorite social media accounts.
-  **Ads**
Find your audience. Advertise your brand, business, or community.
-  **Events**
Bring people together. Create, promote, and manage your events.
-  **Survey Pages** New
New and improved. You can build versatile Survey Pages and get fast feedback from your customers.
-  **Landing Pages**
Mini websites to host sign-up forms, products for sale, coupons, and more.
-  **Websites & Stores**
Get your ecommerce game going. Build or manage your stores and websites.





Automated Campaign Settings

Which type of contact activity do you want to trigger this Automated Series?

Trigger Type

A Contact joins a list

Madden Visitor Lead List (45721)

member page login (9)

MSA (1286)

New Member (107)

Primaries (1197)

renewals 11-22-19 (80)

renewals 4-10-20 (154)

1 selected

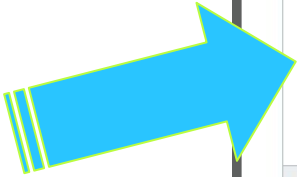
Create a new list

(Optional) Add additional criteria.

Contacts will only receive emails in the series if they meet the criteria below and are in the selected list(s) above. [Learn more](#)

+ Add Criteria

Cancel Save



Series Trigger

The first time a contact joins one of these lists



test

Updated : May 03, 2021



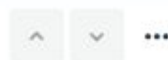
Wait 4 days

Edit

1

Draft

Send this email



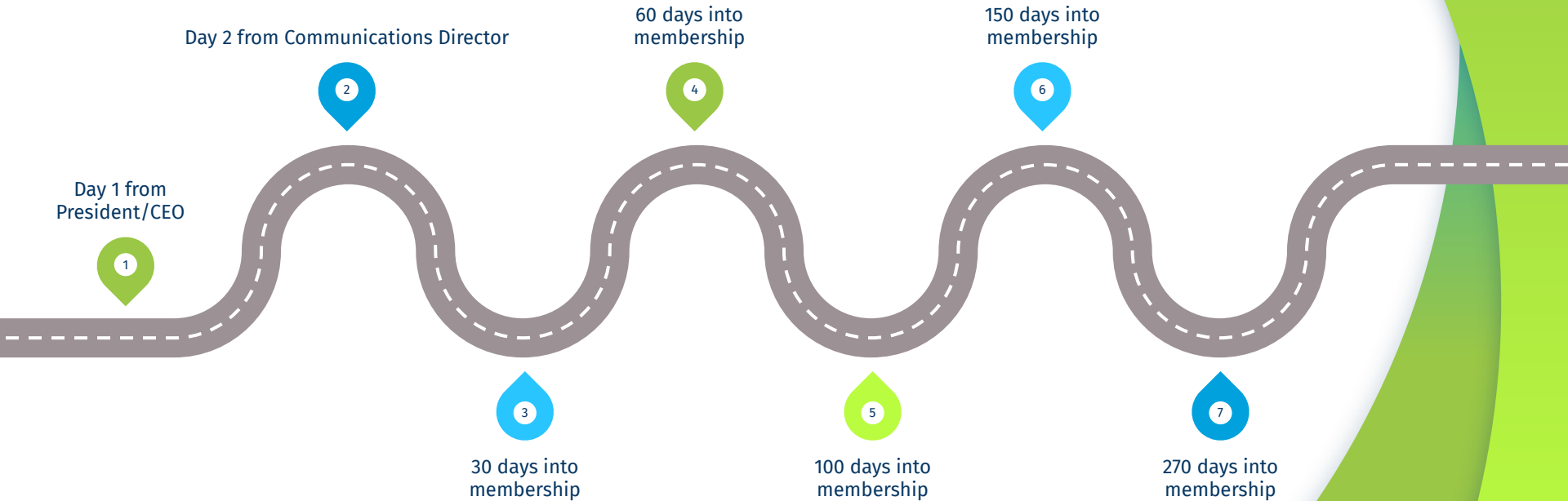
Create New Email



Copy Existing Email

+ Add to series

Roadmap For Engagement



Frequency & Content

Day 1

Welcome email from Chamber President/CEO

We promote an “open door” policy with our leadership and include contact info such as an email.

Day 2

Member dashboard login info from Communications Director

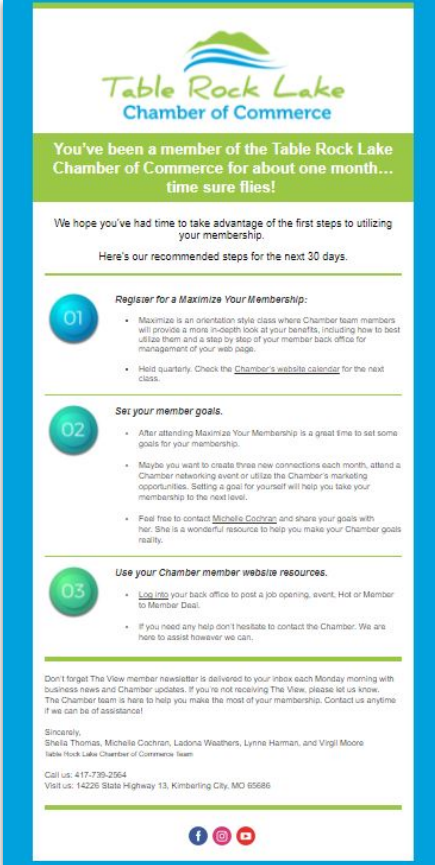
It’s our goal for members to quickly meet other staff members, not just our Membership Development Director. This is our first “what’s in it for you” message.

Frequency & Content

30 Days (1 Month)

Three goals to utilize your membership:

- Register for Maximize Your Membership.
- Set your member goals.
- Use your Chamber member website resources.



The graphic is a vertical rectangular card with a blue border. At the top is the Table Rock Lake Chamber of Commerce logo, featuring a stylized green and blue wave above the text "Table Rock Lake Chamber of Commerce". Below the logo is a green banner with white text: "You've been a member of the Table Rock Lake Chamber of Commerce for about one month... time sure flies!". The main body of the card is white with blue text. It starts with a paragraph: "We hope you've had time to take advantage of the first steps to utilizing your membership. Here's our recommended steps for the next 30 days." This is followed by three numbered sections, each with a blue circular icon containing a white number. Section 01: "Register for a Maximize Your Membership." with a bulleted list of two items. Section 02: "Set your member goals." with a bulleted list of three items. Section 03: "Use your Chamber member website resources." with a bulleted list of two items. At the bottom, there is a small paragraph of text, a signature block, and social media icons for Facebook, Instagram, and YouTube.

Table Rock Lake Chamber of Commerce

You've been a member of the Table Rock Lake Chamber of Commerce for about one month... time sure flies!

We hope you've had time to take advantage of the first steps to utilizing your membership. Here's our recommended steps for the next 30 days.

01 Register for a Maximize Your Membership:

- Maximize is an orientation style class where Chamber team members will provide a more in-depth look at your benefits, including how to best utilize them and a step by step of your member back office for management of your web page.
- Held quarterly. Check the [Chamber's website calendar](#) for the next class.

02 Set your member goals.

- After attending Maximize Your Membership is a great time to set some goals for your membership.
- Maybe you want to create three new connections each month, attend a Chamber networking event or utilize the Chamber's marketing opportunities. Setting a goal for yourself will help you take your membership to the next level.
- Feel free to contact [Michelle Cochran](#) and share your goals with her. She is a wonderful resource to help you make your Chamber goals reality.

03 Use your Chamber member website resources.

- [Log into](#) your back office to post a job opening, event, Hot or Member to Member Deal.
- If you need any help don't hesitate to contact the Chamber. We are here to assist however we can.

Don't forget The View member newsletter is delivered to your inbox each Monday morning with business news and Chamber updates. If you're not receiving The View, please let us know. The Chamber team is here to help you make the most of your membership. Contact us anytime if we can be of assistance!

Sincerely,
Shelia Thomas, Michelle Cochran, Ladona Wathers, Lynne Hamen, and Virgil Moore
Table Rock Lake Chamber of Commerce Team

Call us: 417-739-2064
Visit us: 14228 State Highway 13, Kimberling City, MO 65686

[f](#) [@](#) [v](#)

Frequency & Content

60 Days (2 Months)

Connect with us and other members:

- When making social media posts, tag us in your Facebook or Instagram posts.
- Check out the online business directory.
- Review promotional opportunities.

The image shows a screenshot of an email from the Table Rock Lake Chamber of Commerce. The email is titled "Happy two-month anniversary.... You've been a Chamber partner for TWO WHOLE MONTHS!". It contains three numbered sections: "Let's get social.", "Check out the online business directory.", and "Review promotional opportunities.". Each section includes specific advice for members. At the bottom, there is contact information for the Chamber team, including phone and address details, and social media icons for Facebook and Instagram.

Table Rock Lake Chamber of Commerce

**Happy two-month anniversary....
You've been a Chamber partner for
TWO WHOLE MONTHS!**

We hope you've found time to accomplish your first 30 days membership goals.

Here's our recommendations for month two of membership.

01 Let's get social.

- When making social media posts, tag us in your Facebook or Instagram posts.
- For community or business info tag the Chamber's page @tablerocklakeChamber, for visitor related posts tag Visit Table Rock Lake's page @visittablerocklake.

02 Check out the online business directory.

- Your fellow Chamber members are great business connections. Pick out a few to introduce yourself to whether via email or in person at a future Chamber event.



03 Review promotional opportunities.

- Email blasts, visitor guide advertising, event sponsorships and more are all great promotional opportunities available for our Chamber members.
- You can find a list in our [Opportunities Guide](#), or contact [Michelle Cochran](#) to review your goals and which promotions might be the best fit for your business.

The Chamber team is here to help you make most of your membership. Contact us anytime if we can be of assistance!

Sincerely,
Sheila Thomas, Michelle Cochran, Cassie Aberle, Ladona Weathers and Virgil Moore
Table Rock Lake Chamber of Commerce Team

Call us: 417-739-2564
Visit us: 14226 State Highway 13, Kimberling City, MO 65686

Frequency & Content

100 Days (3+ Months)

Benefit Reminders:

- Job Postings
- Event Listings
- Networking



The image shows an email template for the Table Rock Lake Chamber of Commerce. At the top is the logo, which features a stylized mountain and water graphic above the text "Table Rock Lake Chamber of Commerce". Below the logo is a green banner with white text that reads "Did you know you've been a member of the Table Rock Lake Chamber of Commerce for over 100 DAYS!". The main body of the email is white with a blue border. It contains the following text: "Now is a great time to think about utilizing member benefits you have not had the opportunity to put to work just yet. Here's just a small list of some of your options. Here's just a small list of some of your options." followed by a bulleted list: "• Job Postings", "• Event Listings", "• Business Web-page", "• Email Blasts", "• Networking", "• Advertising". Below the list is a paragraph: "If you have questions regarding your benefits contact us anytime. If you have not stopped into our Welcome Center at 14226 State Highway 13, Kimberling City, we invite you to do so. Provide us with a handful of business cards or brochures and we will keep them available for folks who stop in or call for information." This is followed by "Let us know if we can help!". The email ends with a sign-off: "Sincerely, Sheila Thomas, Michelle Cochran, Ladona Weathers, Lynne Harman, and Virgil Moore Table Rock Lake Chamber of Commerce Team". At the bottom, it provides contact information: "Call us: 417-739-2554 Visit us: 14226 State Highway 13, Kimberling City, MO 65685". At the very bottom, there are icons for Facebook and Instagram.

Table Rock Lake Chamber of Commerce

Did you know you've been a member of the Table Rock Lake Chamber of Commerce for over 100 DAYS!

Now is a great time to think about utilizing member benefits you have not had the opportunity to put to work just yet. Here's just a small list of some of your options.

Here's just a small list of some of your options.

- Job Postings
- Event Listings
- Business Web-page
- Email Blasts
- Networking
- Advertising

If you have questions regarding your benefits contact us anytime. If you have not stopped into our Welcome Center at 14226 State Highway 13, Kimberling City, we invite you to do so. Provide us with a handful of business cards or brochures and we will keep them available for folks who stop in or call for information.

Let us know if we can help!

Sincerely,
Sheila Thomas, Michelle Cochran, Ladona Weathers, Lynne Harman, and Virgil Moore
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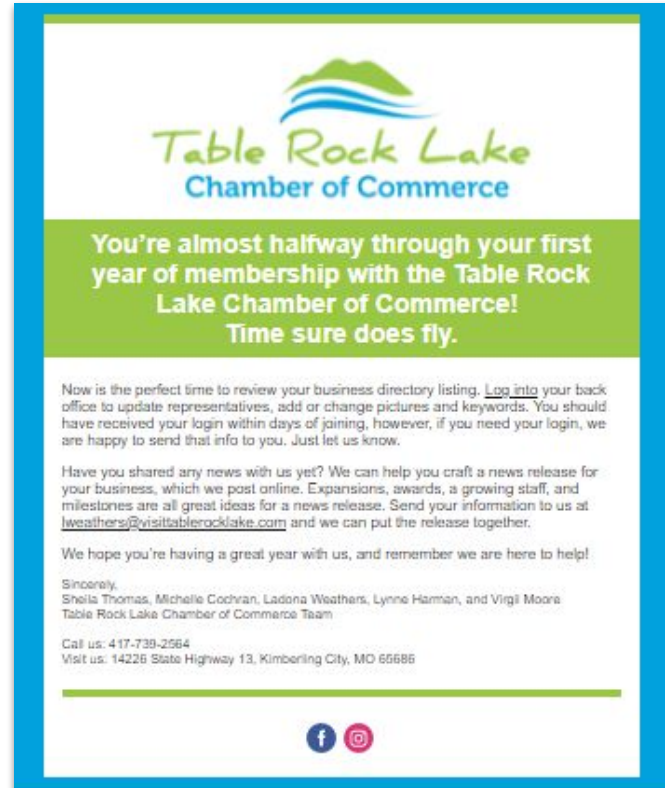
 

Frequency & Content


150 Days (5 Months)

Halfway point into their membership year

- Reminder to review their business directory listing



The image shows an email template with a blue border. At the top is the logo for Table Rock Lake Chamber of Commerce, featuring a stylized mountain and water graphic. Below the logo is a green banner with white text: "You're almost halfway through your first year of membership with the Table Rock Lake Chamber of Commerce! Time sure does fly." The main body of the email contains three paragraphs of text. The first paragraph discusses updating business directory listings. The second paragraph offers help with news releases. The third paragraph expresses support for the member's year. At the bottom, there is a signature block and contact information, followed by a green horizontal line and social media icons for Facebook and Instagram.


You're almost halfway through your first year of membership with the Table Rock Lake Chamber of Commerce!
Time sure does fly.



Now is the perfect time to review your business directory listing. [Log into](#) your back office to update representatives, add or change pictures and keywords. You should have received your login within days of joining, however, if you need your login, we are happy to send that info to you. Just let us know.

Have you shared any news with us yet? We can help you craft a news release for your business, which we post online. Expansions, awards, a growing staff, and milestones are all great ideas for a news release. Send your information to us at lwathers@visittablerocklake.com and we can put the release together.

We hope you're having a great year with us, and remember we are here to help!

Sincerely,
Sheila Thomas, Michelle Cochran, Ladona Weathers, Lynne Hamman, and Virgil Moore
Table Rock Lake Chamber of Commerce Team

Call us: 417-739-2564
Visit us: 14226 State Highway 13, Kimberling City, MO 65686

Frequency & Content

270 Days (9 Months)

About 9 months into membership

- Appreciation email from President/CEO
- Renewal/Invoice process will begin in month 10.



How do we know it's working?

88.82% Retention Rate

2019

91.04% Retention Rate

2020

Retention Messages

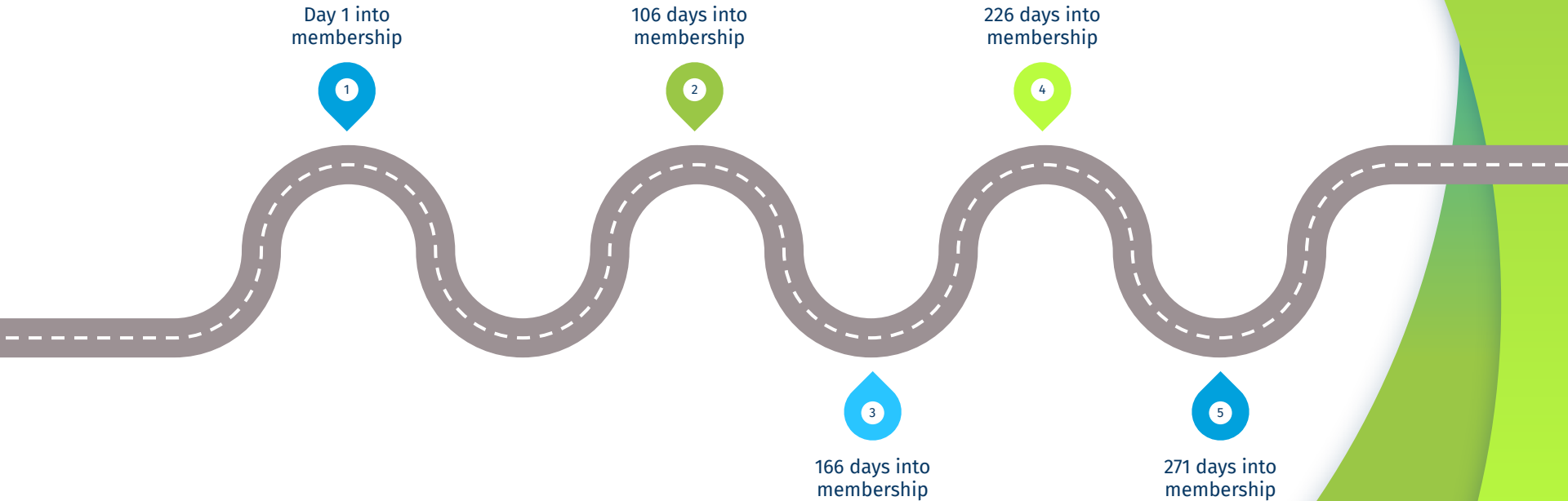
Creating Champions



Upon renewal...

1. Place the primary representative in the *Renewal Group* in Chamber Master.
2. Group is synced with Constant Contact.


Roadmap For Engagement



Frequency & Content

Immediately

Reminder to update business info and explanation to why it's important



The screenshot shows an email from the Table Rock Lake Chamber of Commerce. The header features the organization's logo and the question "Is your business information correct?". The main body of the email contains three sections: a reminder to review business listing information with a list of three bullet points, a "Member Web Page Pro Tip" about keyword optimization, and a section titled "Why updating your member business page is important" with another list of three bullet points. The email concludes with a contact offer, a signature block, and contact information. At the bottom, there are social media icons for Facebook, Instagram, and YouTube.

Table Rock Lake Chamber of Commerce

Is your business information correct?

One of the benefits provided to Table Rock Lake Chamber members is your business web page hosted on VisitTableRockLake.com.

Now is a great time to review your business listing information:

- [Log in](#) to update your active company representatives, logo descriptions, hours, address and more.
- You can add many pictures and one video to your business listing.
- Need a refresher on how to make changes? [Click here](#) for a video.

Member Web Page Pro Tip!

Take a close look at the keyword section of your web information. You can enter an keyword that makes sense for your business. Think about the words someone might use to search for your business on Google. VisitTableRockLake.com has a search function and results are pulled from your posted keywords.




Why updating your member business page is important:

- As the designated marketing organization for Stone County, the Table Rock Lake Chamber spends a significant portion of the area's marketing budget driving traffic to VisitTableRockLake.com, and we want our members to benefit from that traffic!
- VisitTableRockLake.com is often one of the first sites that come up Google searches for area businesses.
- Each day, Chamber staff answer many phone calls for referrals both tourism and general business related. The information provided to callers comes from your business listing.

Don't forget, the Chamber team is here to help you make most of your membership. Contact us anytime if we can be of assistance!

Sincerely,
Shelia Thomas, Michelle Croxvan, Lynne Herman, Ladona Weathers and Virgil Moore
Table Rock Lake Chamber of Commerce Team

Call us: 417-739-2564
Visit us: 14226 State Highway 13, Kimberling City, MO 65688

Frequency & Content

106 Days (3.5 Months)

Business promotion available to members

- Social Media
- Advertising/Sponsorships



Use the Chamber to promote your business!

Here's a quick reminder of some of the business opportunities available to Chamber members.

Let's get social.

- When making social media posts, tag us in your Facebook or Instagram posts.
- For community or business info tag the Chamber's page [@tblrocklakeChamber](#); for visitor related posts tag Visit Table Rock Lake's page [@visittblrocklake](#).

Advertising and Sponsorships

- Email blasts, visitor guide advertising, event sponsorships and more are all great promotional opportunities available for our Chamber members.
- You can find a list in our [Opportunities Guide](#), or contact [Michelle Cochran](#) to review your goals and which promotions might be the best fit for your business.

The Chamber team is here to help you make most of your membership. Contact us anytime if we can be of assistance!

Sincerely,
Shelia Thomas, Michelle Cochran, Lynne Harman, Ladona Weathers and Virgi Moore
Table Rock Lake Chamber of Commerce Team

Call us: 417-738-2564
Visit us: 14226 State Highway 13, Kimberling City, MO 65686



Frequency & Content

166 Days (5.5 Months)

Connecting with other members

- Business Directory
- Monthly Luncheons
- Welcome Center
- Online Benefits



The image shows a screenshot of a newsletter or email from the Table Rock Lake Chamber of Commerce. The header features the organization's logo, which consists of a stylized mountain range above the text "Table Rock Lake Chamber of Commerce". Below the logo is a green banner with the text "Connect with other members!". The main body of the newsletter contains several sections of text, each starting with a bold heading. The sections are: "Online Business Directory", "Monthly Member Luncheons", "Hot Deals, News Releases and Event Postings", "Welcome Center", and "Networking Events". Each section provides a brief description of the service or event. At the bottom of the newsletter, there is a closing statement, contact information, and social media icons for Facebook and Instagram.

**Table Rock Lake
Chamber of Commerce**

Connect with other members!

We love bringing our partner businesses together and helping you connect. Here's a quick reminder of some of the connection opportunities available.

Online Business Directory
In the Business Directory, find other great businesses and their contact information.

Monthly Member Luncheons
The last Thursday of each month members come together for networking and an informative program. Check The View for registration information.

Hot Deals, News Releases and Event Postings
VisitTableRockLake.com hosts information for visitors, community members and business representatives. As a member, you're invited to submit deals, business news and events.

Welcome Center
The Chamber's Welcome Center displays information from our partner businesses. Feel free to drop off business cards or flyers for us to have available for inquires. The Welcome Center is a resource for you to find other member businesses as well.

Networking Events
Throughout the year Business After Hours, Maximize Your Membership, Speed Networking, Chamber University, Annual Golf Tournament and Lake Splash Annual Banquet are held. Any Chamber event is a prime place to network and begin creating new or strengthening existing connections. Check the [Chamber calendar](#) for what's coming up next.

If you have questions regarding your benefits contact us anytime.
Let us know if we can help!

Sincerely,
Sheila Thomas, Michelle Cochran, Ladona Weathers, Lynne Herman, and Virgil Moore
Table Rock Lake Chamber of Commerce Team

Call us: 417-738-2564
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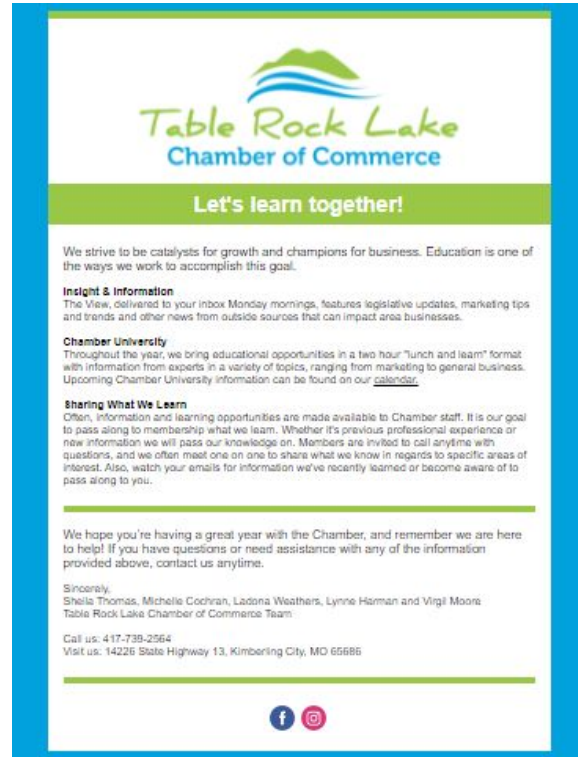
 

Frequency & Content

226 Days (7.5 Months)

Learning opportunities

- View Newsletter
- Chamber University
- Digital Check Ups



Frequency & Content

271 Days (9 Months)

Appreciation email from President/CEO



Insights & Data

Using data to “level up.”



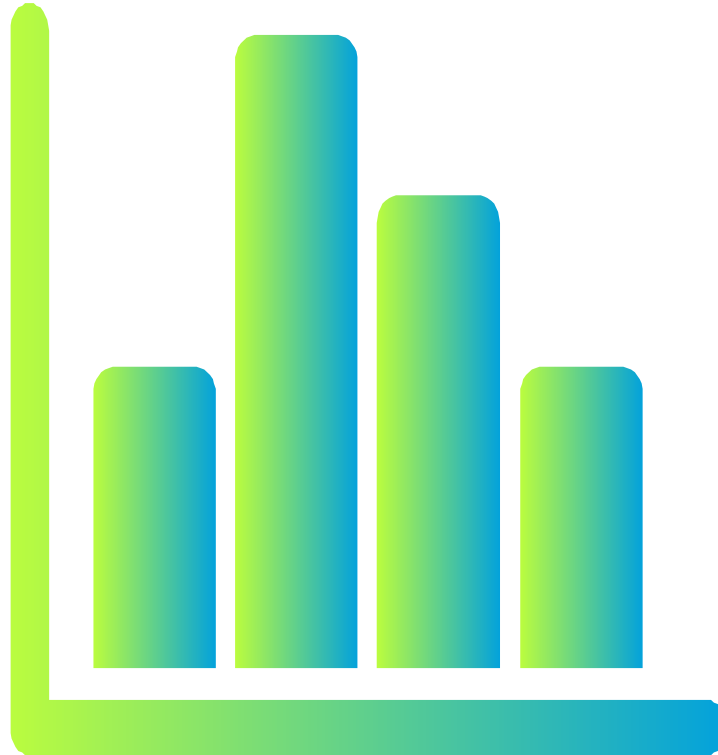
We know...

If we can connect and engage with members, they are likely to renew and increase their investment.

What if we miss?

How do we identify a member we're missing before it's
too late?

Use the data provided by your mass email service.



What basic insights will tell you.

Sent/Bounced

Identify problematic email addresses quickly.

Opens

You can tell from your first email, and each email after, if that representative is opening your emails. We use this to identify members who are not engaging/losing interest.

Clicks

Identify what peaks that representative's interest.

Work Smarter...Not Harder with List Segments

- Every link/button added to your email can be tied to a list segment.
- Segments are separate “groupings.”
- When someone clicks a link/button that has been tied to a segment, they are placed into that group.
- Segments can be used to create more targeted email messages or for other purposes like event invitation targeting or sales prospects.

Now Go Be A Rockstar!



**Questions for
Ladona Weathers?**

lweathers@visittablerocklake.com



**Find this presentation and other
resources at**

www.visittablerocklake.com/MAKO