

# Effortless Onboarding

## *Chamber Drip Campaigns*

### **SIMPLIFIED!**



Conroe/Lake Conroe Chamber of Commerce

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PRE-WORK

2

SET-UP

3

MAINTAIN

4

REPEAT

# Effortless Onboarding:

Chamber Drip Campaigns  
**Simplified**

*Shannan Reid*

Director of Community Relations  
Conroe/Lake Conroe Chamber of Commerce





1

# Effortless Onboarding:

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**PRE-WORK**

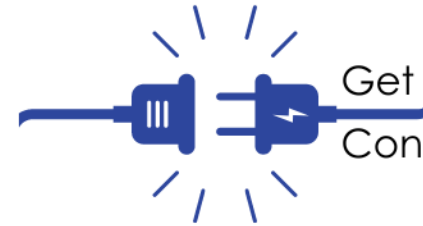
## THERE IS JUST SO MUCH TO SAY!!!



Directory  
Profile  
Setup



Attend  
Events



Get  
Connected



Monthly  
Gatherings



Resource  
Links



Sponsorships  
& Advertising  
Opportunities



Mission  
Statement  
& Culture



Teams &  
Initiatives



Annual  
Events

## HIT THEM QUICK



GET IN

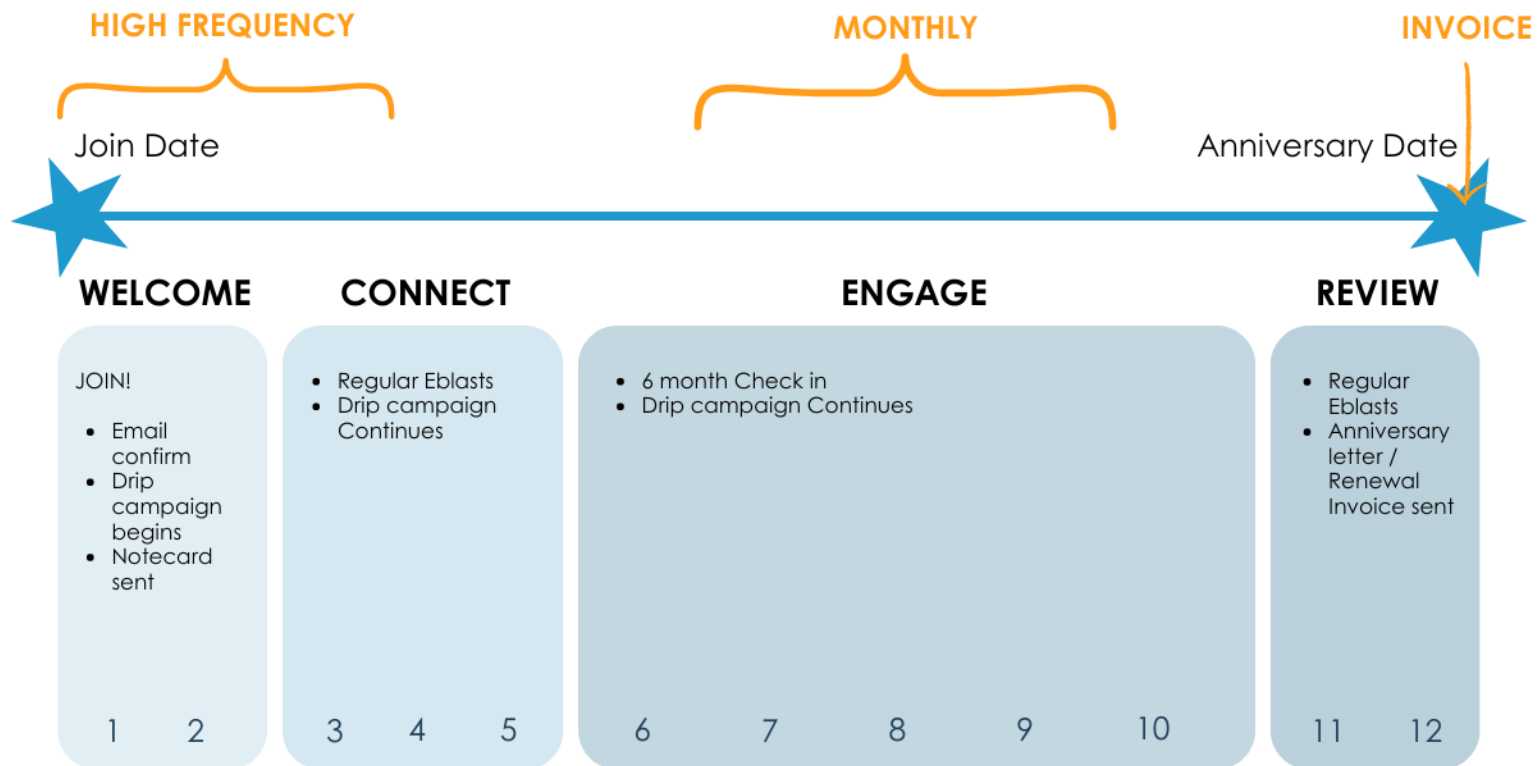


GET OUT



## ANTICIPATE THEIR JOURNEY

### 12 mo plan





## KNOW YOUR AUDIENCE

They might  
all be  
considered  
**SMALL** in  
size...

But their  
**NEEDS** are so  
different!



Agent Andy  
30%



CEO Charlie  
16%



Community  
Cassie  
9%



Entrepreneur  
Emily  
28%



Branch  
Manager Bobby  
9%

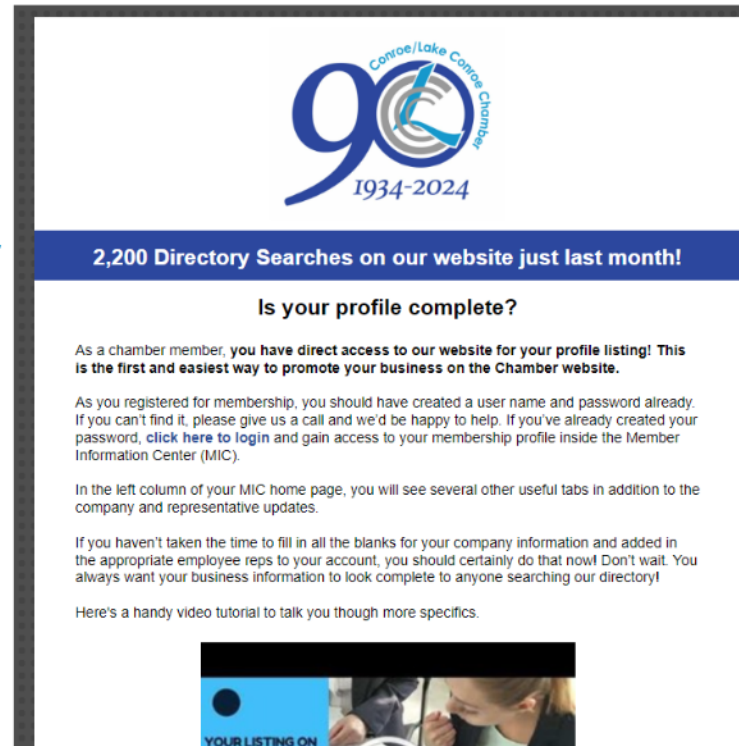



Marketing Mary  
7%

## SOLVE A PROBLEM

Use language in  
SUBJECT LINE  
and 1st 3 lines

to capture  
attention  
according to  
their persona!



  
**2,200 Directory Searches on our website just last month!**

**Is your profile complete?**

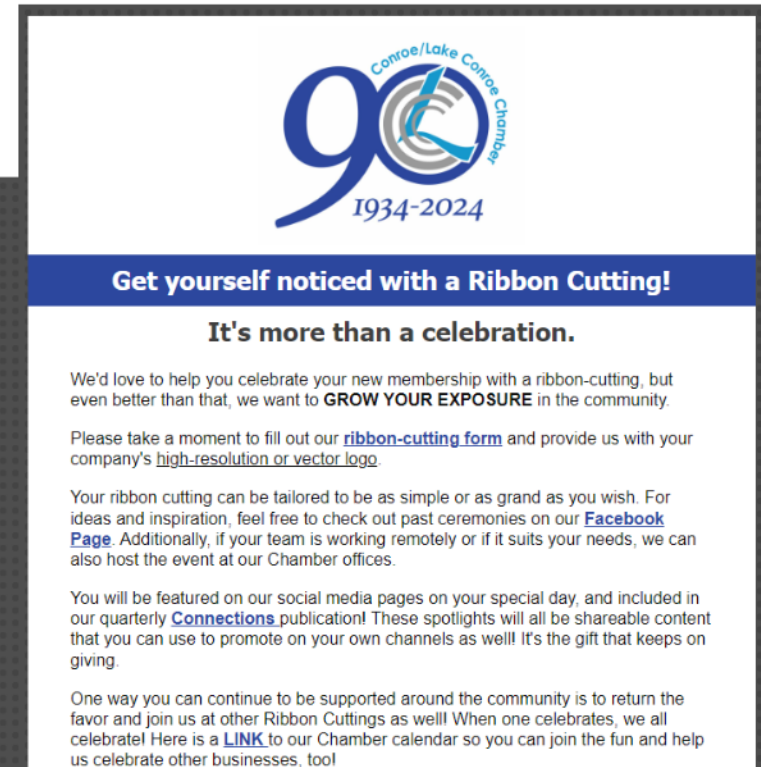
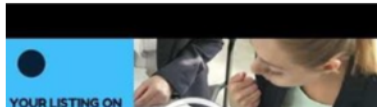
As a chamber member, you have direct access to our website for your profile listing! This is the first and easiest way to promote your business on the Chamber website.


As you registered for membership, you should have created a user name and password already. If you can't find it, please give us a call and we'd be happy to help. If you've already created your password, [click here to login](#) and gain access to your membership profile inside the Member Information Center (MIC).

In the left column of your MIC home page, you will see several other useful tabs in addition to the company and representative updates.

If you haven't taken the time to fill in all the blanks for your company information and added in the appropriate employee reps to your account, you should certainly do that now! Don't wait. You always want your business information to look complete to anyone searching our directory!

Here's a handy video tutorial to talk you through more specifics.



  
**Get yourself noticed with a Ribbon Cutting!**

**It's more than a celebration.**

We'd love to help you celebrate your new membership with a ribbon-cutting, but even better than that, we want to **GROW YOUR EXPOSURE** in the community.

Please take a moment to fill out our [ribbon-cutting form](#) and provide us with your company's [high-resolution or vector logo](#).

Your ribbon cutting can be tailored to be as simple or as grand as you wish. For ideas and inspiration, feel free to check out past ceremonies on our [Facebook Page](#). Additionally, if your team is working remotely or if it suits your needs, we can also host the event at our Chamber offices.

You will be featured on our social media pages on your special day, and included in our quarterly [Connections](#) publication! These spotlights will all be shareable content that you can use to promote on your own channels as well! It's the gift that keeps on giving.

One way you can continue to be supported around the community is to return the favor and join us at other Ribbon Cuttings as well! When one celebrates, we all celebrate! Here is a [LINK](#) to our Chamber calendar so you can join the fun and help us celebrate other businesses, too!



2

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**SET-UP**

## SET YOUR TASK LIST

### In ChamberMaster:

Create a template  
of steps

Assign it to each  
new member

Assign ownership  
with timeline

Follow through!

Tasks

All ▾

Task

Type to search... 🔍

- [Note card + Window Cling](#)
- [Add contact to Constant Contact list](#)
- [Phone Call](#)
- [SCHEDULE 6 Month Check In](#)
- [Complete member profile](#)
- [Attend Orientation](#)
- [Switch to enhanced pkg](#)
- [Social Blast](#)

## BUILD YOUR LIST

In Constant Contact:

Start a list **JUST** for  
New Member  
Onboarding

Manually add new  
contacts to that list  
once they have  
synced

A screenshot of a contact profile for Aimee Westbrook. The profile includes fields for email address, first name, last name, and company name. On the right side, there is a "Lists" section with a scrollable list of lists. The list "New Member Onboarding" is circled in orange. The text "THEN ADD..." is overlaid in orange on the right side of the screenshot.

**Aimee Westbrook**  
Email Subscribed  
Added by API on Jan 25, 2023 • Edited 11 hr. ago

Details Engagement Notes (0)

**Campaign channel**  
Email address  
aimee@magnoliawoodstexas.com  
Subscribed by you on Jan 25, 2023 at 1:46am CST

**Basic details**  
First name  
Aimee  
Last name  
Westbrook  
Company name  
Magnolia Woods Office Suites and Meeting Space

**THEN ADD...**

**Lists**

- tesy Representatives from ChamberM
- Clicked: Lone Star, Community Events
- Clicked: Networking Events
- New Member Onboarding**

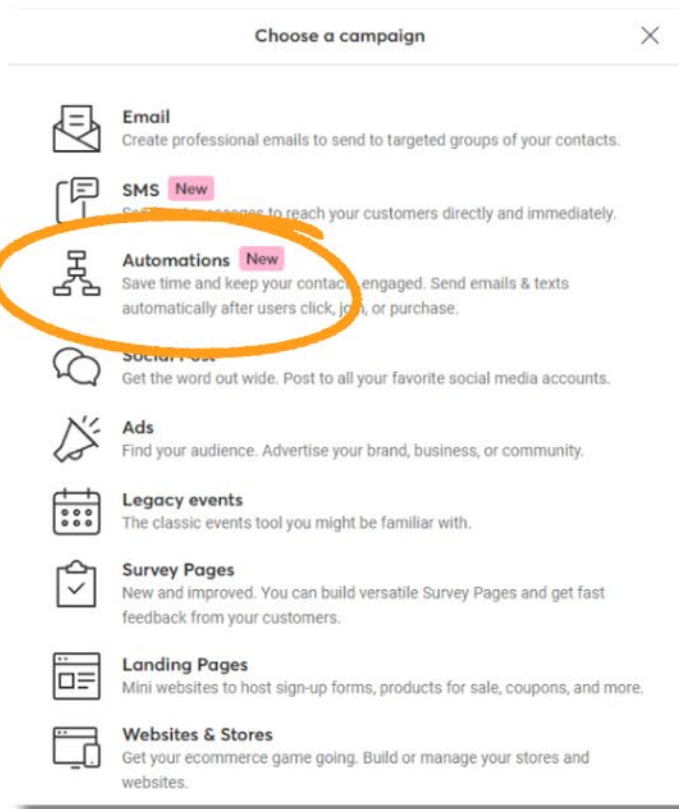


## CHOOSE AUTOMATION

**In Constant Contact:**

**Select Automation**

**Start with a template  
or define your own!**



## START YOUR CAMPAIGN

**Series Trigger:**

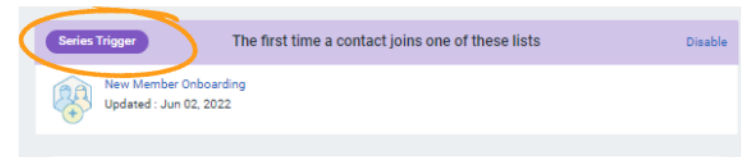
**First time a contact  
joins the list.**

**Build your first email  
exactly right**

**Then use it as the  
template for the rest**



### SET TRIGGER



### CREATE EMAIL TEMPLATE



## SET YOUR TIMING

Start with high frequency:

A few days  
A week  
2 weeks

Then land at  
1 month apart  
until renewal time



SET TIMING

1 day

1 week

1 month

The screenshot displays an email series configuration. At the top, it says "Series Trigger: The first time a contact joins one of these lists" and "Disable". Below this, there are five email items, each with a "Send this email" button and a "Queue" count of 0. The items are:

- Item 1: "Promote Your Business on the Chamber Website" with a "Wait 1 days" interval. Metrics: Sent 40, Opened 61.4%, Clicked 6.8%.
- Item 2: "Sponsorships & Advertising" with a "Wait 1 days" interval. Metrics: Sent 40, Opened 66.2%, Clicked 20.5%.
- Item 3: "Get Connected" with a "Wait 5 days" interval. Metrics: Sent 40, Opened 63.9%, Clicked 12.6%.
- Item 4: "Events Info" with a "Wait 2 days" interval. Metrics: Sent 40, Opened 66.2%, Clicked 15.9%.
- Item 5: "Speed Dial / Resources" with a "Wait 5 days" interval. Metrics: Sent 40, Opened 72.1%, Clicked 9.2%.



## CONTENT RECIPE

**Refer to your  
Journey Map  
12 mo plan**

**Prioritize your  
content by need**

1. Welcome screen after joining
  2. Directory Profile Setup
  3. Ribbon Cutting
  4. Networking
  5. Exclusive Advertising
  6. Events & Sponsorships
  7. Chamber Resources
  8. Mission/Culture
  9. Community
  10. Initiatives
  11. Leave us a review
  12. Renewal is coming...
- Invoice

## STEALTH SEGMENTATION

For every link  
you offer them...

collect their  
response!

This tells you  
more about them  
so you can  
personalize!

**Insert Link**

Text to display as link  
Check the calendar

Link URL  
<https://business.montgomeryreachamber.com/events/calendarcatg>  
Add Dynamic Variables

Enable Click Segmentation  
Clicking on this link will add the contact to the specific list, helping you send more targeted emails.  
[Learn more.](#)

Clicked: Networking Events

[+ Create new list](#)

Cancel **Insert**

Clicked: Networking Events

Select a contact list from the dropdown below

- Advocacy
- Potential Members (Uncleaned)
- Lone Star Vendors
- New Member Onboarding
- Clicked: Lone Star, Community Events
- Test Group 2
- Clicked: Networking Events**
- Lead Magnet: Home Based Business
- MIP Volunteers (Sign up Genius)
- General Interest
- Education
- Lead Magnet: 1 month social media calendar
- Montgomery City Emails
- Clicked: Marketing Opportunities
- Membership 2016
- Clicked: Blog or Business Tips
- Facebook Lead Ads
- Chamber Volunteers (Sign up Genius)
- Economic Development

3

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**MAINTAIN**

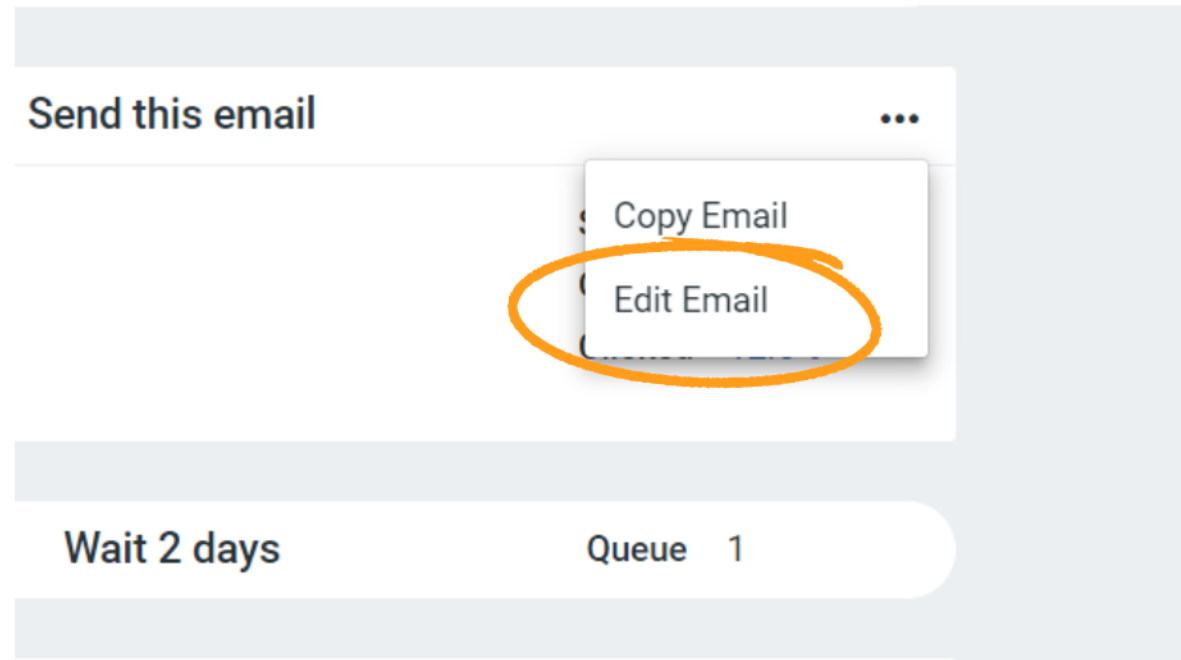


## MAKE EDITS TO EACH/ANY EMAIL

Once it is published you can only edit content.

No add/delete of emails

No reordering



**Tweak Content!**

**Swap Sponsor Block!**

## TRACK YOUR ANALYTICS

Sent #2 Promote Your Business on the Chamber Website

[Back To Series](#)

Details Reporting Heat Map

### Email Performance

See how your emails are doing with your audience. [Compare your results to the industry average.](#)

Troubleshoot  
early!

Sent

111

Open Rate

65.4%

Click Rate

15%



Opens

70

Clicks

16

Sent

111

Did Not Open

37

Bounces

4

Unsubscribed

0

Successful Deliveries

107

Spam Reports

0

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**REPEAT**



REPEAT

# COPY SERIES:

The screenshot shows a software interface with a blue header bar. Below the header, there is a horizontal blue line. The main content area contains several elements: the text "AM to 4:00 PM", a button labeled "FAQ", a button labeled "Cancel Series", and a three-dot menu icon. An orange arrow points to the three-dot menu icon. A dropdown menu is open from the three-dot icon, containing three options: "Delivery Settings", "Copy Series" (which is circled in orange), and "Save & Exit". Below the dropdown menu, the text "Queue 0" is visible.

## ADDITIONAL THEMES:

**3+**

**Veteran  
Member  
Refresher**

*leads to leadership/ambassadors*



**Sponsor Block/  
Event Sponsor  
Drip**

*leads to big donors*



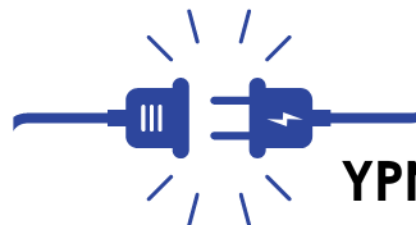
**Gov. Affairs  
Drip**

*leads to advocacy team*



**Advertising  
Marketing  
Opportunities**

*leads to advertisers*



**YPN Drip**

*leads to young professional  
engagement*



**Networking  
Drip**

*leads to better skills and  
engagement*

# DRIP ME

## DRIP ME!

**SCAN NOW!**

**You will receive all my drips for the  
New Member Onboarding Campaign.**

**12 months of drips in 12 hours.**

**It's time for a little R&D!**



*Shannan Reid*

Director of Community Relations  
Conroe/Lake Conroe Chamber of Commerce