

Design New Member Onboarding

Use this template to draft the new member onboarding experience for your community. Reference your value statements, member profiles, journey map, and community personality to guide your decisions along the way.

Make some initial decisions about the design

What is the purpose of the onboarding experience from the members' perspective?

What specifically should members walk away with by the end of the experience?

Examples: A new mentor in the community, connections with other members, a clear understanding of how to use community tools/platforms, awareness of community norms, access to resources, a plan for contributing to ongoing community initiatives/projects.

What is the overall tone of the onboarding experience?

Note: Revisit the tone cards in the community card deck for ideas.

What community ritual(s) should be introduced throughout the experience?

Note: Revisit your ritual design activity for ideas.

What aspect(s) of community value (to members and/or the organization) can be supported through the onboarding process? List no more than two.

Location (physical or virtual)

Expected # of participants

Leaders/Facilitators/Hosts



Draft a high-level sequence of activities

1. Welcome message	First day
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	
Total Length (may be a range):	

Create an experience agenda

In each major part of your agenda, consider the sensory, emotional, and cognitive experience you want to create for the members by answering the following four prompts.



What are they noticing with any of their five senses?



What relationships are they forming?



What emotion do they feel?



What is the one thing you hope they'll remember from this part of the experience?

beginning





end

Notes

