

Membership & Engagement_SOP

PHCC of North Carolina

1. Purpose

To ensure a consistent, high-quality process for:

- Recruiting the *right* members (not just more members)
- Delivering immediate value
- Driving early and ongoing engagement
- Increasing retention and referrals through relationships

Core Principle: *We are not selling memberships — we are building a network and driving engagement.*

2. Membership Philosophy

- Membership success = engagement + relationships + value utilization
- Growth comes primarily from:
 - Engaged members
 - Leadership involvement
 - Members who actively use programs (apprenticeship, education, etc.)
- Staff role = facilitator + connector, not salesperson

3. Membership Lifecycle Overview

Stage 1: Inquiry / Interest

Goal: Educate and guide (not sell)

Process:

1. Respond to inquiry (email or referral)
2. Provide:

- Top 4–5 relevant benefits (based on their needs)
 - Link to full membership page
 - Link to calendar (Calendly)
3. Offer conversation:
- “Let’s talk through what would be most valuable to you”
4. Optional:
- Invite to attend a local meeting as a guest
5. Copy:
- Referring member
 - Local leadership (Chair + Membership Chair)

Key Strategy:

- Tailor message based on WHY they reached out (workforce, networking, etc.)
- Use locals as a conversion tool

Stage 2: Application Submitted

Goal: Vet and approve the right members

Contractor Applications:

1. Review application
2. Verify license:
 - Use NC Plumbing HVAC License Lookup
3. Contact references:
 - Confirm ethical business practices
 - Use as relationship-building opportunity
 - Use as an opportunity to market PHCC to references as well

4. Approve application in GrowthZone

Associate Applications:

- Review for alignment with mission
 - Confirm value-add potential (education, benefits, etc.)
 - Associates MUST engage to remain members- provide education, discount, rebate or other member benefit and/or attend events and build relationships
 - Approve application
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Stage 3: Welcome & Onboarding (DAY 1 – CRITICAL)

Goal: Immediate connection + clear value

Steps:

1. Copy application into ChatGPT → generate welcome email
2. Customize:
 - Reference WHY they joined
 - Add any personal notes from conversations
3. Send via GrowthZone (not personal email) – interactions should be trackable

Welcome Email MUST Include:

- Warm welcome
- Leadership introductions:
 - Board President
 - Membership Chairs
 - Local Chair
 - Staff contact
- Member benefits (tailored)
- Links:

- Events
- Committees
- Apprenticeship / Education
- Calendly link for onboarding
- Member snapshot (company info)

CC:

- Leadership
- Referring member (if applicable)

This “closes the loop” and reinforces connection

Stage 4: System Setup (Immediately After Approval)

In GrowthZone:

1. Approve application
2. Set user access to Primary
3. Send:
 - Member Hub login email
4. Confirm:
 - Profile is complete (auto-populated initially)

Stage 5: Immediate Engagement (First 10 -15 Days)

Goal: Get them involved FAST**

Within 24–48 Hours:

- Send invite to:
 - Next Local Chapter Meeting

- Upcoming relevant event

Ongoing (First Month):

- Personal follow-up: Set up to be automated when possible
 - "How was your first meeting?"
- Reinforce benefits they selected with relevant communication campaign:
 - Workforce → Apprenticeship
 - Networking → Locals
 - Leadership → Committees

Coordinate with Leadership:

- Notify:
 - Local Chair
 - Membership Chairs
- Ask them to:
 - Reach out personally
 - Welcome at events

Stage 6: Continued Engagement (30–90 Days)

Goal: Deepen involvement**

- Encourage:
 - Committee participation
 - Event attendance
 - Program usage (education, apprenticeship)
- Monitor:
 - Event attendance

- Engagement level

4. Contractor vs. Associate Approach

Contractor Members (Primary Audience)

Focus on:

- Workforce development
- Apprenticeship
- Licensing & education
- Peer connection
- Advocacy

Messaging:

“We support your business and workforce.”

Associate Members (Partners)

Focus on:

- Visibility
- Relationship-building
- Education opportunities
- Sponsorship pathway

Important Positioning:

- We do not work for associates
- We connect them to contractors
- They must add value to members

“Help us serve contractors, and it will serve you.”

5. Engagement Strategy Framework

Priority Order

1. Immediate connection
2. Event participation
3. Relationship building
4. Program usage
5. Leadership involvement

6. Key Tools & Systems

GrowthZone

- Application processing
- Email tracking (REQUIRED)
- Member records

AI/ Growthzone (Membership Project)

- Welcome emails
- Benefit explanations
- Personalized messaging

Calendly

- Onboarding scheduling
- Member conversations

7. Staff Responsibilities

Membership & Engagement Role

- Lead onboarding (not board)
- Personalize communication
- Connect members to:
 - People
 - Programs
 - Events
- Track engagement
- Support leadership outreach

8. Success Metrics

- Event attendance (especially locals)
- Committee participation
- Program enrollment (apprenticeship, CE)
- Member referrals
- Retention rate

9. Key Reminders

- Do NOT “sell” membership
- DO:
 - Educate
 - Connect
 - Personalize
- Engagement drives:
 - Retention

- Growth
- Revenue

"If they engage, they stay. If they stay, they refer."

10. Quick Checklist (Daily Use)

New Inquiry:

- Send intro email + calendar link for exploratory meeting
- Invite to local meeting

New Application:

- Review + verify
- Approve in GrowthZone

New Member:

- Send welcome email (GrowthZone)
- Set to Primary
- Add employees to membership
- Send login emails
- Invite to next event
- Assign to segmented campaigns based on their needs. (targeted intentional communication)

First 30 Days:

- Follow up personally
- Connect to leadership
- Encourage engagement and get them plugged in

Ongoing:

- Track engagement and update communication based on interest
- Make sure they engage in something at least quarterly
- Ask for buy-in (solidification through service)
- Show appreciation and recognition when possible
- Reevaluate needs so we grow with them- We are an extension of their business.