

- Directory of Officers: *Show them that the leaders are accessible!*
- List of positions available on Standing Committees: *Inform them of opportunities to volunteer.*
- [NAIFA National](#), State and Local Member Benefits: *Tailor to their needs!*
- [Government Relations Wins and Accomplishments](#) and [Advocacy Brief](#): *Illustrate how NAIFA Government Relations fights for the industry and them!*
- NAIFA [Leadership in Life Institute \(LILI\)](#): *Share the importance of personal and professional growth!*
- [Young Advisors Team \(YAT\)](#): *Expose them to the resources that matter most to them!*
- [NAIFA Preferred Providers](#): *Demonstrate how benefits like CopyTalk, Advisors Assistant, and Errors & Omissions Coverage Discounts can enhance their business and increase their bottom line!*
- [Code of Ethics](#): *NAIFA members, by virtue of their membership, are in good company and held to high standards.*

#### STEP 5: Follow-up by:

- Sending a “Thank You” to those in attendance.
- Recognizing and honoring mentors.
- Providing a report to your local board and a list of new and / or potential volunteers for them to reach out via personal note, call, email or social media.
- Informing member of next meeting / event and encourage mentor or “buddy” to attend their first few meetings with the new member.

#### STEP 6: Continue the Experience by Providing:

- An Online Journey:
  - Association Website: Ensure that your association website is current and informs and inspires members.
  - Social Media opportunities such as [Facebook](#), [Twitter](#) and [LinkedIn](#) and the [NAIFA Blog](#)
  - Orientation Tab: Have an orientation tab on your homepage that provides interactive and customizable paths based on members needs.
  - Orientation Webinars: If you choose to conduct your New Member Orientation Sessions via webinar, this provides a LIVE interactive opportunity across geographical areas with a live question-and-answer section that can then be housed online for future viewing. Work with your Executive and/or state association office to determine the best webinar service.
- Beneficial [meetings](#) and programs.

**STEP 7:** Share your success with NAIFA National by submitting to the Best Practices Database at [www.naifa.org/leaders/share.cfm](http://www.naifa.org/leaders/share.cfm) so we can share them with fellow states and locals who are looking to enhance or start a new member orientation.



# Local Association New Member Orientation Guide

**INFORM, INSPIRE AND MENTOR NEW MEMBERS**

NATIONAL ASSOCIATION OF INSURANCE AND FINANCIAL ADVISORS



# New Member Orientation Guide

New Member Orientations are programs that inform, inspire, and mentor new members into lifelong members. Craft a partnership between the new member and NAIFA.

Create *and* re-create the experience of lifelong membership by utilizing this guide to build a relationship-based orientation rather than the more mechanical and impersonal versions.

## WHO IS RESPONSIBLE?

The local National Committeeperson, in collaboration with the local Membership Chair, is responsible for ensuring execution of the program.

## WHAT IS A NEW MEMBER ORIENTATION PROGRAM?

A program to:

1. Involve, excite and motivate new members about the association's mission.
2. Identify future association leaders.
3. Engage new members to experience the value of NAIFA.

## RESOURCES AND ITEMS TO REMEMBER:

- ▲ Target the individual member's needs!
- ▲ See [New Member Orientation Overview](http://www.naifa.org/leaders/membership/local/newmember.cfm) at [www.naifa.org/leaders/membership/local/newmember.cfm](http://www.naifa.org/leaders/membership/local/newmember.cfm).
- ▲ Engage your local National Committeeperson and Membership Chair: Local National Committeepersons are responsible for working directly with their State National Committeeperson and Membership Chair to implement new member orientations and managing the implementation of the Seven Touches Program. See the Local National Committeeperson's job description in the [Best Practices Workbook](#).
- ▲ Implement the [Seven Touches Program](http://www.naifa.org/leaders/documents/seven_touches.pdf) ([www.naifa.org/leaders/documents/seven\\_touches.pdf](http://www.naifa.org/leaders/documents/seven_touches.pdf)) and the [Seven Touches Program Tracking Sheet](http://www.naifa.org/leaders/documents/seven_touches_enhanced.xls). ([www.naifa.org/leaders/documents/seven\\_touches\\_enhanced.xls](http://www.naifa.org/leaders/documents/seven_touches_enhanced.xls))
- ▲ Utilize the [Meeting Template Document and Resources](#) to develop your association meetings and deliver timely advocacy updates, a vast array of member benefits, industry expert speakers and beneficial networking opportunities to members. Successful programs create ongoing loyalty.
- ▲ Create the "NAIFA" experience that will have the member renewing and sharing his/her story.

## NEW MEMBER ORIENTATION PROGRAM TEMPLATE:

### STEP 1: Target the new members individual needs by:

- Identifying why they joined.
- ▲ Solicit and assess their interests, strengths, and availability to volunteer. A [volunteer profile template](#) is available to customize to suit your local association.
  - Engage YATs immediately—*Understand how much/little they are able to volunteer and get them involved at some level!*
  - Determining how they prefer to communicate and receive [benefits](#).

- Providing resources TAILORED to their needs:
  - Advocacy: [www.naifa.org/advocacy](http://www.naifa.org/advocacy)
  - NAIFA National Member Benefits: [www.naifa.org/benefits](http://www.naifa.org/benefits)
    - *Advisor Today*: [www.advisortoday.com](http://www.advisortoday.com)
    - Professional Programs: [www.naifa.org/benefits/prof\\_programs](http://www.naifa.org/benefits/prof_programs)
    - Member Business Services Discounts: [www.naifa.org/benefits/preferred](http://www.naifa.org/benefits/preferred)
    - Professional Practice Tools & Tips: [www.naifa.org/benefits/prof\\_tool\\_tips](http://www.naifa.org/benefits/prof_tool_tips)
    - Networks: [www.naifa.org/benefits/networks](http://www.naifa.org/benefits/networks)
    - Young Advisors Team: [www.naifa.org/yat](http://www.naifa.org/yat)

### STEP 2: Implement the [Seven Touches Program](#)

The Seven Touches Program: *Equates to 3 National touches (1a, 1b and 3), 2 State touches (2 and 4) and 3 Local touches (5, 6 and 7).*

#### State Touches:

- Touch 2: State Association email and mailing
- Touch 4: New Member Welcome Kit

#### Local Touches:

- Touch 5: Face-to-Face Meeting
- Touch 6: Phone Call
- Touch 7: Phone Call

### STEP 3: Identify an appropriate mentor to share experience and assist the new member.

- Solicit the Board
- Ask for Volunteers
- Partner by company or practice specialty
- Utilize social media
- Be creative

### STEP 4: Plan a [New Member Orientation Session](#).

The [NAIFA Best Practices Workbook](#) suggests that the New Member Orientation Session(s) be held in:

- July/August
- October/November
- February/March/April
- More often, as needed (each month), or as prescribed by your association.

#### Planning and Executing:

- Identify the best facilitator.
- Invite new members and their mentors.
- Items to consider covering and/or utilizing during this session:
  - [Certificate of Membership](#): *Recognize their commitment!*
  - Association business card with contact information, website, email, etc:  
*Make it easy!*