

Form Name:	Sharing Our Success Submission Form
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Sharing Our Success (SOS) Submission Form

Chapter Name:	South Florida
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Chapter Membership Size:	Medium (100-249)
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Chapter Contact Person:	Lisa Perez
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Email Address:	engagement@atdsfl.org
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Phone Number:	(954) 249-1202
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Chapter Board Position:	Director of New Member Engagement
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Chapter Website URL:	https://atdsfl.org/
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Submission Title:	New Member Engagement Packet
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What did you do? (a 2-3 sentence summary of your effort):	We developed and launched a structured New Member Engagement Guide to help new and prospective members quickly understand ATD South Florida's benefits, programs, and pathways to involvement. The effort included redesigning a New Member Orientation experience, a comprehensive Welcome Packet, and a 90-day onboarding checklist that guides members to take specific actions like completing their portal profile, attending events, joining SIGs, and exploring volunteering. This creates a consistent, repeatable onboarding process that we anticipate will increase connection, participation, and retention.
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Who benefitted from this effort (Target Audience) Check all that apply:	☐ Chapter Members ☐ Potential Chapter Members
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Why did you do it? What chapter needs were addressed?	I thought ATD South Florida could use a consistent, repeatable way to welcome and activate new members so they quickly understood chapter benefits and how to get involved by making next steps clear, increasing early event participation, and improving retention. The effort in conjunction with the already occurring quarterly orientation, created a unified onboarding experience that supports both new and prospective members and helps student members, professionals, and corporate contacts plug in faster with a clear roadmap.
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What were the measurable outcomes? (May include data regarding financial gains, membership increases, target audience satisfaction levels, publicity for the chapter or for the profession, etc.)

In the first orientation delivered using the updated process, we had 9 attendees, strong engagement during the session, and positive informal feedback. We also implemented a post-session survey to measure satisfaction, clarity, and next-step confidence, and to capture member interests for targeted follow-up. Over time, success will be measured by orientation attendance, event registrations within 30-90 days of joining, volunteer inquiries, program participation but I'm still figuring all that out :-)

What steps did you take to implement this effort? (Remember that other chapter leaders will use this to replicate the effort. Be specific)

1. Reviewed the Director of New Member Engagement duties and defined clear onboarding goals: welcome, orient, connect, and activate members.
2. Audited existing materials and redesigned the New Member Orientation slide deck to improve flow, clarity, and calls to action.
3. Built a comprehensive Welcome Packet aligned to chapter offerings (events, SIGs, Mentorship, CPTD/APTD Study Group, volunteering, Power Membership/ChIP code) and structured it for easy use and distribution.
4. Created a 90-day onboarding checklist with week-by-week action steps to guide members to immediate value.
5. Added a post-session survey (Google Form) to capture feedback and member interests; used branching questions to keep it short while gathering actionable insights.
6. Developed email templates for: welcome outreach, orientation invitations, and follow-ups for members who expressed interest in specific programs (ex. CPTD/APTD Study Group).
7. Established a repeatable cadence: orientation held monthly, with consistent promotion, registration link, and follow-up process.

Is there anything you would do differently?

Not sure yet but I would implement a more formal tracking system from the start (ex. simple dashboard) to measure activation metrics such as portal profile completion, event registration within 30 days, and volunteer inquiries. I would also like to add a short "new member buddy" component to pair first-time attendees with a volunteer for faster relationship-building and completion of the 90 day roadmap/checklist.

When did you start working on this effort?

Oct 06, 2025

When did this effort go live?

Nov 13, 2025

Approximately how many hours were spent working on this? Include an estimate of hours spent across all board members and volunteers.	6
What resources did you use? Check all that apply:	Other: HR Onboarding process experience, Wild Apricot tools and chapter website, Google Forms, Google Drive, existing chapter orientation deck
Do you have any additional insights to share with other chapters implementing this effort?	Not really, I'm just trying to keep the onboarding experience simple and action-based. New members do not need every detail, they need clear next steps. Use one consistent monthly orientation cadence, add a short checklist, and collect quick feedback after each session so you can iterate. The biggest driver of engagement is making involvement pathways obvious and personally inviting members to their first event, SIG, or volunteer role. We are still working on increasing attendance.
Please attach any documents that help support this submission. It is highly encouraged to submit editable files (ex. Word, Excel, etc): (additional documents and documents over 2MB should be sent to sos@td.org)	https://www.formstack.com/admin/download/file/19311898946
How did you become familiar with the Sharing Our Success (SOS) program? Select all that apply:	Other: Attended the Leader Connect on 3/20/26
Would you be willing to apply to present on this submission at the ATD Chapter Leaders Conference (ALC)? *Request for Proposals (RFPs) open in October of each year at td.org/alc. Selected session facilitators receive complimentary registration.	Yes
email_consent	true