

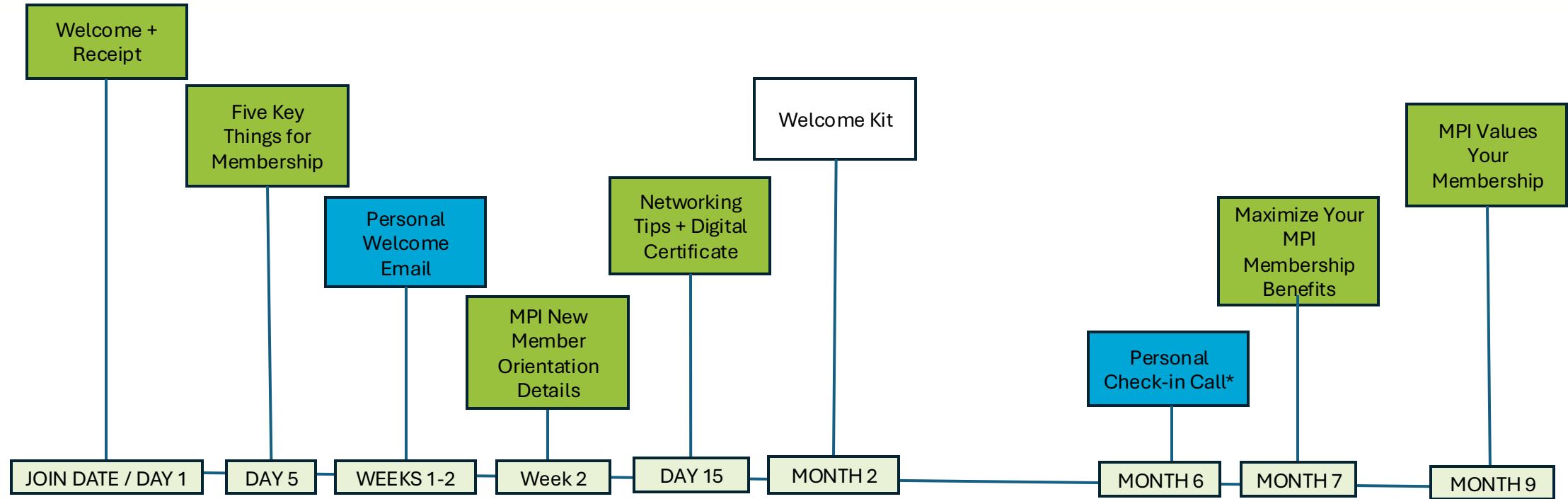
MPI Global and Chapter New Member Onboarding Strategy

MPI Global Onboarding Strategy



- Global communications begin on the day a member joins through the first nine months of membership.
- Onboarding communications are in place to welcome a member to MPI, reinforce the value of their membership, and set the member up for success.
- Key information is shared about how to access and utilize benefits and how to connect with fellow members and their chapter.
- First year members are the most difficult to retain. Onboarding efforts help ensure each member is engaged and satisfied.
- Chapter and Global communications should work in harmony to avoid overlap and save on volunteer resources (time).

Global Onboarding Timeline



Automated Emails

Direct Outreach from Member Engagement Team

Printed Material

*Applies to members acquired during major Global campaigns.

Example: Onboarding Communications



This is an example of the Global communication timeline for a membership expiring who joined on May 1.

May 1	Email 1: Welcome + Receipt
May 5	Email 2: Five Key Things for Membership
May 7-14	Personal Outreach 1: Welcome Email
May 8-14	Email 3: New Member Orientation
May 15	Email 4: Networking Tips + Digital Membership Certificate
June	Welcome Kit (Letter and Printed Membership Certificate)
December	Email 5: Maximize Your MPI Membership Benefits
February	Email 6: MPI Values Your Membership

Global Messaging – Week 1



Subject: We are pleased to welcome you to Meeting Professionals International



Hi, Timothy.

Welcome to Meeting Professionals International! We are so thrilled to have you as part of this amazing community. As we love to [say](#), you have invested wisely in yourself.

You now have access to the largest meetings and events community on the planet. More than 13,000 professionals spread across 75 countries and localized through 70 clubs and chapters.

First, I highly encourage you to get connected with your local [chapter](#). Doing so will open up countless doors and new opportunities both professionally and personally.

Also, make sure to spend time at [MPI.org](#), where you can learn about our educational offerings available through the MPI [Academy](#) that will future proof your career. You can also get more details about our signature events like the [World Education Congress \(WEC\)](#) and the [European Meetings and Events Conference \(EMEC\)](#). While you're there, make sure to log into your [account](#) and tell us more about yourself, so we can personalize your member experience.

Interested in giving back or need financial assistance? Then look no further than the MPI [Foundation](#). In the past ten years, we have distributed more than \$4.2 million dollars to benefit our industry directly; more than any other industry partner. You can be a part of that and should!

Finally, our community is rich in diversity, which offers you the unique opportunity to meet up with others who share your affiliations, both personal and professional. Explore our [communities](#) and become a part of the conversation.

Once again, congratulations! I look forward to meeting you soon at one of our events and learning about your successes since joining MPI.

Our Member Engagement Team and your local chapter will be keeping in touch with you all year. If you have any questions in the meantime, please reach out to us at 1-866-318-2743 or at feedback@mpi.org.

Get ready for an amazing ride. Because when we meet, we change the world!

Thanks,

Timothy A Gunn
Vice President of Community
Meetings Professionals International

Day 1 - Email Welcome

Member Profile

MPI ID#: 1191582

Type: Meeting Management Professional - Supplier

Chapter: Dallas/Fort Worth Chapter

Tenure: 10 Year(s)

Here's 5 Key Things for Membership (First 5 Things)



Welcome home!

Kristina, we couldn't be more thrilled that you've joined more than twelve thousand meeting and event professionals who call MPI their career home.

To get you started, we want you to feel confident navigating your member benefits, so we've provided a checklist of five key things (see what we did there?) that you should do, starting today.



Log on

This might seem like an obvious step, but knowing how is key! And while you're at it, make sure you [complete your member profile](#). This helps us deliver content, education and value, tailor-made for you. Otherwise, we will be like great Aunt Sue and assume what you want for your birthday. Hint. It's rarely something you want.

Day 5 – Email Navigating Your Benefits

Explore your benefits

As a planner or supplier you have so many resources available to you. Get familiar with [everything we have to offer](#). After all, we are here to make your life easier!



Engage with members

Introduce yourself to your local chapter and join one (or more) of [our MPI Communities](#). They will help immerse you in every facet of our global network. So don't be a wallflower—dive in! The water is warm in our [online forums](#).



Educate yourself

As a member, you have access to a whole library of [educational offerings](#) from the MPI Academy. Give your brain a workout and browse our certificate courses, webinars, virtual summits and whitepapers. There's so much for you to choose from it will feel like you're back in school—but taking the classes that you actually like.



Sign up for the New Member Orientation

While we've hit the highlights, [this orientation](#) will connect the dots of your membership. Don't miss this live opportunity to ask questions, meet new members and become even more familiar with what it means to be a member of MPI. Because we are here for you and with you.

Global Messaging – Month 1



Subject: MPI New Member Orientation Webinar

Week 3 – Email
Register for Global
Orientation



Hi, Katsuko.

Welcome to MPI!

To gain the most from your MPI membership, we recommend registering for one of our upcoming live New Member Orientation webinars. We'll provide an overview of the many benefits available to you, so you can develop a plan to make your membership experience meet your expectations. No clock hours will be earned for attending this webinar but there is a lot of useful information you won't want to miss! This webinar is separate from any new member orientation your local chapter might host and focuses on global benefits.

Click [here](#) to register and also view all upcoming New Member Orientation webinars.

I would also encourage you to take some time exploring how to [maximize your membership](#). If you have any questions, please contact Member Services at 972-702-3030.

Again, welcome to MPI, look forward to working with you to help elevate you both personally and professionally.

Kind regards,

Timothy A. Gunn
Vice President of Community
Meetings Professionals International (MPI)
www.mpi.org

Day 15 – Email - Networking Tips



Preferred
Member

Dear Kristina,

One of the greatest benefits of your MPI membership is the opportunity to network with other meeting and event professionals in your area, and around the world.

As a Preferred Member, you can connect locally at one of 70 MPI Chapters and Clubs worldwide, allowing you to get education and networking right in your community.

Your chapter will keep you up to date on local events and programs and provide connection to other members. [View your chapter's website](#) and plan to attend an upcoming event.

You can access our global network by engaging in [the MPI Community](#). It's your online home to discuss ideas, exchange best practices, and share your passion for the industry. It's also mobile friendly, empowering you to connect with fellow members anytime, anywhere.

Don't forget to [update your profile](#). Your membership is a personal experience and we want to make sure we are providing you relevant content and opportunities. Please feel free to contact us at 1-866-318-2743 or via email feedback@mpiweb.org at any time.

Let's get connected,

A handwritten signature in black ink, appearing to read "Timothy A. Gunn".

Timothy A. Gunn
Vice President of Community

Member Profile

MPI ID#: 1530392

Type: Supplier Meeting
Professional

Chapter: Chicago Area Chapter

Tenure: 0 Year(s)

Global Messaging – Month 2



Month 2 – Welcome Kit
sent via Mail (US and Canada)



July 10, 2026
Susan Lee

Dear Susan,

Welcome to Meeting Professionals International! I want to personally thank you for joining MPI and congratulate you for taking the initiative to invest in yourself by engaging with our amazing 12,000 members worldwide.

You have embarked on a journey that will create lifelong personal and career connections with our engaged and diverse community of professionals. At MPI, we know the face-to-face meetings are the catalysts for innovation, economic development, and positive impact, because "when we meet, we change the world."

Tenured members often share with me that their experience with MPI was maximized and enhanced by the personal commitments they made to it; they share that "you get from MPI, what you put in." Start engaging with your local chapter, where you'll find new resources and connections and develop lifelong partners and friends. And get involved by contributing to a committee or council, which affords you valuable leadership experience and insights, all while giving back to this industry.

Of course, lifelong learning and education are key to personal and professional development. As a member, you now have access to our MPI Academy offerings. Whether you're just starting in this industry, seeking to get your CMM or CMP or interested in getting your Masters in Events, MPI has unequalled depth in educational programs.

If you want to fulfill a specific professional interest, look no further than our ever-expanding MPI Communities. From medical to association planners, independent and small business owners, administrative assistants and many more groups, our MPI Communities provide a personalized fit for you to instantly connect and engage with other like-minded members.

Finally, our signature, award-winning events like World Education Congress and European Meetings and Events Conference, offer unique, unparalleled gatherings for our community where education and networking merge into experiences that are life-changing.

I look forward to connecting with you soon. Thank you again for your engagement with MPI and your commitment to our industry.

A handwritten signature in black ink, reading "Paul Van Deventer".

Paul Van Deventer
President and CEO
Meeting Professionals International



Susan Lee

Member Number 1520551
Member Since 6/26/2026

Global Messaging – Month 7 and 9



Maximize Your MPI Membership Benefits (Month 7 Premier)

Month 7 – Email
Reminder of Benefits



Premier
Member

Dear Kristina,

I hope you have been enjoying your first few months of MPI membership!

As a member of the largest and most diverse meeting and event community in the world, you can:

- [Network with thought leaders](#) across our industry.
- [Access education and certification programs](#) that will enhance your job skills.

- [Find your next career opportunity](#) or your company's next new hire.
- [Find trusted vendors and suppliers](#) in markets around the world.

At MPI, we strive to "connect the connectors." And the best way for you to engage with other connectors in your area is through [your local MPI chapter](#).

Again, thank you for being a member of MPI!

All the best,

A handwritten signature in black ink that reads "Christine Richards".

Christine Richards
Manager, Membership Development
Meetings Professionals International (MPI)

Member Profile

MPI ID#:

Type: Supplier Meeting
Professional

Chapter:

Tenure: 0 Year(s)

MPI Values Your Membership (9 Month Preferred)

Month 9 - Email
Thank You / Connection Tips



Preferred
Member

Dear Natalie,

I just wanted to reach out and personally thank you for being a member of MPI.

MPI could not have grown into the largest, most innovative meeting and event professional organization in the world without the active participation of members like you.

When we meet, we change the world. And with the invaluable contributions of members like you, our power to create change becomes even more amplified.

Hopefully, you've had the chance to connect with fellow MPI members through the last several months. If you haven't, consider attending an upcoming [Chapter](#) event or checking out a new [MPI Community](#).

Again, thank you for being part of the MPI community!

All the best,

A handwritten signature in black ink that reads "Timothy A. Gunn".

Timothy A. Gunn

Member Profile

MPI ID#:

Type: Supplier Meeting
Professional

Chapter:

Tenure: 0 Year(s)

Global New Member Orientation

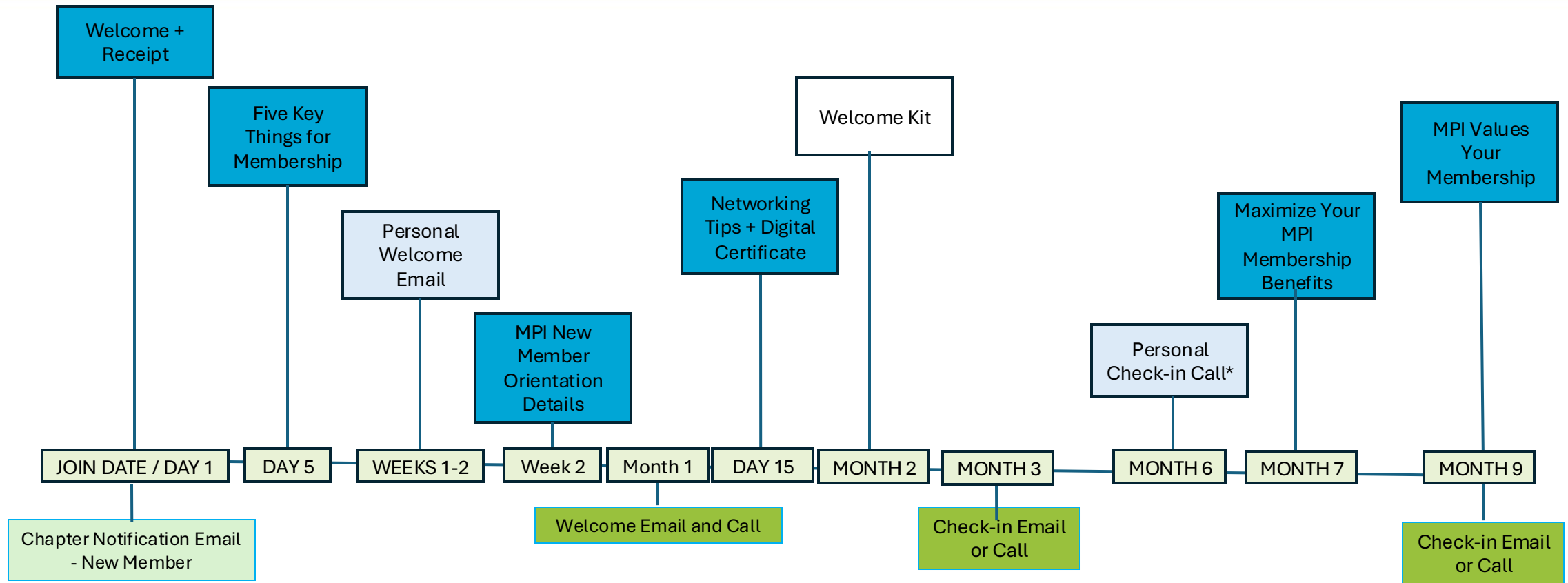
- Hosted monthly by Global Staff
- 45-minute Zoom session
- Mpi.org member account tour
- Education highlights: MPI Academy and Chapter offerings
- Networking highlights: Member Directory, MPI Communities, how to maximize Chapter connections
- Leadership highlights: Volunteer Pathways
- Career Center, MPI Consulting, MPI Foundation, and other opportunities
- Tips for getting started

Recommended Chapter Onboarding Efforts

Chapter Best Practices

- Form a New Member Committee or assign a Chapter Leader(s) to **welcome and engage new members**.
- **Connect early** to learn why members joined and what they hope to get out of membership.
- **Check in** on a regular basis to see how new members are doing.
- As much as possible, keep membership contacts consistent for your chapter. This helps build relationships.

Global + Chapter Onboarding Timeline



Global - Automated Emails	
Global - Direct Outreach from Member Engagement Team	
Global - Printed Material	
*Applies to members acquired during major Global campaigns.	Global Notification to Chapter
	Recommended Chapter Effort

Recommended Chapter Communication: First Month Welcome Call and Email



On/Around	Pull the New Members report with the following filters.
January 1	Start Date = December 1 of prior year End Date = December 31 of prior year
February 1	Start Date = January 1 of current year End Date = January 31 of current year
March 1	Start Date = February 1 of current year End Date = Last day of February current year
April 1	Start Date = March 1 of current year End Date = March 31 of current year
May 1	Start Date = April 1 of current year End Date = April 30 of current year
June 1	Start Date = May 1 of current year End Date = May 31 of current year
July 1	Start Date = June 1 of current year End Date = June 30 of current year
August 1	Start Date = July 1 of current year End Date = July 31 of current year
September 1	Start Date = August 1 of current year End Date = August 31 of current year
October 1	Start Date = September 1 of current year End Date = September 30 of current year
November 1	Start Date = October 1 of current year End Date = October 31 of current year
December 1	Start Date = November 1 of current year End Date = November 30 of current year

- Use the **New Members report** to view all members who joined or rejoined during the last month.
- Refer to the **JoinType** column to see if a member has joined or rejoined.
- Send a **welcome email** (use the template below); follow up with a **call** if time allows.
- Invite and encourage the member to **attend your next event**.
- Find out **why they joined** and **what they hope to achieve** with their membership.

[Use this email template!](#)

[Need help with reports?](#)
[Click here!](#)

Recommended Chapter Communication: 3-Month Check-in Call/Email



On/Around	Pull the New Members report with the following filters.
January 1	Start Date = October 1 of prior year End Date = October 31 of prior year
February 1	Start Date = November 1 of prior year End Date = November 30 of prior year
March 1	Start Date = December 1 of prior year End Date = December 31 of prior year
April 1	Start Date = January 1 of current year End Date = January 31 of current year
May 1	Start Date = February 1 of current year End Date = Last day of February of current year
June 1	Start Date = March 1 of current year End Date = March 31 of current year
July 1	Start Date = April 1 of current year End Date = April 30 of current year
August 1	Start Date = May 1 of current year End Date = May 31 of current year
September 1	Start Date = June 1 of current year End Date = June 30 of current year
October 1	Start Date = July 1 of current year End Date = July 31 of current year
November 1	Start Date = August 1 of current year End Date = August 31 of current year
December 1	Start Date = September 1 of current year End Date = September 30 of current year

- Use the **New Members report** to view all members who joined or rejoined in a certain period.
- Refer to the **JoinType** column to see if a member has joined or rejoined.
- Check in with a phone call or email to **see how the member is doing**.
- **Share information** about your next event, education offerings, or open volunteer opportunities.

**Use this email
template!**

**Need help
with reports?
[Click here!](#)**

Recommended Chapter Communication: 9-Month Check-in Call/Email



On/Around	Pull the New Members report with the following filters.
January 1	Start Date = April 1 of prior year End Date = April 30 of prior year
February 1	Start Date = May 1 of prior year End Date = May 31 of prior year
March 1	Start Date = June 1 of prior year End Date = June 30 of prior year
April 1	Start Date = July 1 of prior year End Date = July 31 of prior year
May 1	Start Date = August 1 of prior year End Date = August 31 of prior year
June 1	Start Date = September 1 of prior year End Date = September 30 of prior year
July 1	Start Date = October 1 of prior year End Date = October 31 of prior year
August 1	Start Date = November 1 of prior year End Date = November 30 of prior year
September 1	Start Date = December 1 of prior year End Date = December 31 of prior year
October 1	Start Date = January 1 of current year End Date = January 31 of current year
November 1	Start Date = February 1 of current year End Date = Last day of February of current year
December 1	Start Date = March 1 of current year End Date = March 31 of current year

- Use the **New Members report** to view all members who joined or rejoined in a certain period.
- Refer to the **JoinType** column to see if a member has joined or rejoined.
- Check in with a phone call or email to **see how the member is doing**.
- **Share information** about your next event, education offerings, or open volunteer opportunities.
- **Reminder of upcoming renewal** – invoice will be sent next month.

**Use this email
template!**

**Need help
with reports?
[Click here!](#)**

Chapter Transfers

- Another group of members to consider are members who transfer from another chapter to your chapter.
- They are not necessarily new to MPI, but new to your chapter.
- Depending on the date range you select, transfer members may not show up on the New Member report. You can view them on the Chapter Transfers report.
- A welcome email and/or phone is helpful to get them acquainted with the unique opportunities your chapter has available.
- Transfers should be welcomed in the month the transfer happens.

Recommended Chapter Communication: Welcome to Chapter Transfers



- Use the **Chapter Transfers report** to view members who have recently transferred into your chapter.
- On/around the last day of the month, pull the report for the entire month. E.g., on January 31, pull the report for January 1 – January 31.
- The report will show you members who have transferred in *and out of* your chapter. For the purposes of this outreach, focus on the members who have transferred in.
- You can identify members who have transferred into your chapter by viewing the **New Chapter** column. Your chapter will be listed in this column if the member has transferred into it.
- Send an email or make a phone call to these members to welcome them to your chapter.
- Focus on what makes your chapter unique and how to get involved.

**Use this email
template!**

**Need help
with reports?
Click here!**

Tips for Getting Started

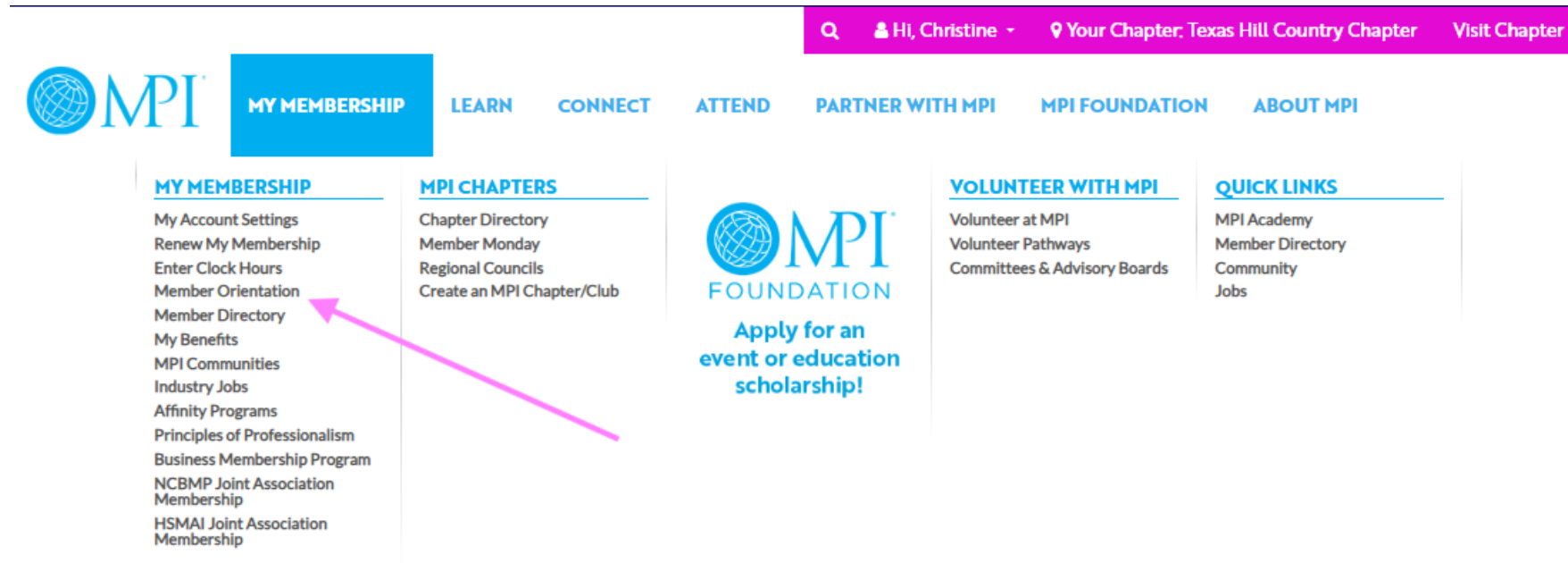
- Welcome emails should be sent to all members who join, rejoin, or transfer into your chapter.
- If time allows, phone calls are also helpful. Split call lists among a few volunteers to help with capacity.
- Create your email templates at the start of the year.
- Update them as needed with new event information, volunteer opportunities, or other timely announcements.
- Send your emails using mail merge to save time and personalize the message. This process typically takes just 5-15 minutes to complete.
- If time allows, send the first new member email when you are notified that the member joins.

Additional Onboarding Ideas

- Create an Ambassador or Buddy System to pair new members with longtime members.
- Send thank you notes to new members for attending events.
- Recognize new members at events, in emails/newsletters, on social media, or on your Chapter website.
- Promote volunteer opportunities to help new members get involved.
- Host a new member orientation to review Chapter-specific benefits.
- Promote the monthly Global New Member Orientation to supplement chapter orientation.
- At your events, seat board/committee members *and* new members at each table.

Additional Onboarding Resources

- Global Orientation Session Information and registration:
mpi.org/membership/mpi-member-orientation/



- Member Services can be reached at feedback@mpi.org