The Success Alliance™

Mastermind Group Onboarding Checklist

By Karyn Greenstreet

Member engagement and retention are crucial elements of a successful, thriving mastermind group. The key initiator is the Onboarding process for a new member.

Here is a checklist for onboarding, from a member engagement perspective. There are other items to consider from an administrative perspective, and during their entire membership, but let's focus on the new member onboarding experience for now.

When members first join a mastermind group, they're relieved that they have found a solution to their challenges, and are eager to begin working towards their goals. But this can quickly bring up fear and doubt, and they ask themselves questions like:

- Did I join the right program?
- How do I get the most for my time and money?

After a person chooses to become a member of your mastermind group, the first element is the Welcome Sequence. This ensures they feel they're in the right place and know how to get all the benefits of your group. If you design a Welcome Sequence that WOWs members, it has a lasting psychological impression on them for months to come.

The Success Alliance™

Mastermind Group Onboarding Checklist

By Karyn Greenstreet

- ✓ *Immediately* after they join, send a welcome email or schedule a private welcome meeting.
- ✓ Design an orientation process, document, video, or website page that gives them an overview of your mastermind group program.
- ✓ If your mastermind group program also includes an educational component, give them an overview of the classes or lessons, and how to access them.
- ✓ Review your Group Guidelines with the new member.
- ✓ Determine their reasons and goals for joining the group. Work with them to design an action plan.
- ✓ Remind them of the date/time of their ongoing mastermind group meetings. Include a typical meeting agenda.
- ✓ Tell them about any upcoming events that they're invited to.
- ✓ Create an opportunity for existing members to meet the new member. If you use an online system, ask new members to update their profiles.
- ✓ Send a Member Journal if you're using one with your group.
- ✓ Send a small, personal Welcome gift, if appropriate.

- ✓ Send a hand-written thank you note.
- ✓ Consider asking an existing member to be a Welcome Ambassador or Accountability Partner to a new member.
- ✓ Ask them if they have any questions, and reply promptly. Tell them exactly how to get in touch with you or your team if they have questions or concerns in the future.
- ✓ Schedule a short follow-up private meeting (or a series of them, depending on the length of your mastermind group).

Additional Resources:

- Free Video Tutorial – Speed Up Growth: Start a Mastermind Group. The basic steps and important decisions when creating your next mastermind group
- Blog post - Why Mastermind Group Preparation Is Important -- For Everyone
- Blog post - 3-Part Process to Help Members Discover and Solve Problems
- Blog post - How to Frame a Hot Seat Topic
- Online course – Mastermind Group Facilitator Training – Self-paced online learning workshop, learn at your own speed