HamptonGolf

New Member Onboarding Checklist

- ☐ Ensure New Member's Application is completely filled out and signed
- ☐ Provide welcome package, welcome gifts, pool key, car stickers, Membership cards, Member number, etc.
- ☐ Add Member's information to operating system
- ☐ Establish and assign in the operating system, approval for auto draft payments
- ☐ Add payment method to operating system
- ☐ Add Food & Beverage Minimum (if applicable)
- ☐ Add initiation fee (if applicable)
- ☐ Make first tee time (Golf Members)
- ☐ Make first dining reservations
- ☐ Scan or save document from Pandadoc and add to Member file
- ☐ Review the Club rules, operating hours, etc with new Member
- ☐ Send welcome email with information regarding mobile app and website, specific contact information for questions, etc.
- ☐ Assist in downloading and signing into Member app on their cellphone (if applicable) and provide instructions on how to use
- ☐ Schedule welcome tour/meet with other Department Heads. Give packet and gift if not received prior to this meeting. Did the Member join the Club, business, social, golf Course, tennis, etc.?
- ☐ Introduce new Member to a Member who is involved in their area of interest, or have the new Member at the next social event to make sure the new Member is introduced by Staff or Member
  - Who is the Member to contact? _____
  - What event will this happen?_____
- ☐ Follow up at the end of the first month to see how they are settling in and if they have any other questions (add to outlook calendar)
- ☐ Invite to Member appreciation/new Member mixer
- ☐ Invite to meet the Team at quarterly meet the team events
- ☐ Review Member referral incentives
- ☐ Provide upcoming month's event calendar
- ☐ Provide golf tournament/event schedule (Golf Members)

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