

Membership Program Launch Checklist

For your launch story to stay front-and-center, there are a lot of details to get right behind the scenes. Here's a practical checklist to help with that. Head to "[Launching our membership program](#)" for details on the items below.

Timing

Have you checked your calendar?

You can aim for a time when it will be easy to attract people's attention because there's nothing competing for it, or you can latch onto a mission-aligned news moment.

Do you know how long your launch will last?

How long will you drum up your new membership program? Membership Puzzle Project recommends no more than three weeks for any membership marketing campaign.

Telling your story

Have you identified your membership value proposition?

You should test it with a few of your loyal audience members to make sure it resonates and that the ask is clear.

Do you have a membership landing page, and does it have the essentials?

It should be easy to find, reflect your overall branding, reiterate your value proposition, and get to the point: payment.

Customer Service

Do you have an "if this, then that" protocol in place?

Your team should do its best to list all the scenarios that could come up and decide on a standardized response for each.

Do you have an FAQ?

Spend some time with your team anticipating what your most frequently asked questions might be and turn them into a public FAQ that can be quickly shared with members

Do you have someone on standby for customer support?

A cornerstone of good customer service is resolving issues promptly. A twenty-four hour turnaround is the longest it should take to respond to a member about an issue under normal circumstances, but you should aim for a much faster turnaround at launch.

Do you have a plan in place for delivering member benefits and perks?

Whether the benefits are digital or physical, you should be prepared to consistently provide them. Automate the delivery, or schedule reminders to manage fulfillment.

Is your checkout process easy?

You should test it on mobile and desktop, preferably with someone not on staff who you are confident would join anyways.

Technical issues

Have you accounted for different currencies?

If you are using a payment processor developed in another country/for a different currency, check that it will process credit cards from your company properly.

Is your payment processor “talking” to your CRM?

Is your payment processor “talking” to your CRM? Check that the person who tested your checkout process is now in your CRM as a member.

Is your CRM linked to your email service provider?

This will help you do things like suppress membership appeals to existing members and trigger your onboarding series. This is especially important if you plan to ask aggressively for a couple weeks.

Setting the foundation for future growth and retention

Do you have a plan for identifying your best opportunities for future growth?

Your launch will give you valuable information about where new members come from and what types of appeals resonate the most – if you take the time to set up a tracking system before launch.

Is your onboarding series set up?

Retention begins with the way you welcome your new members.

Do you have a plan for thanking your founding members?

Your founding members are your biggest fans. A personal thank you will go a long way. Leverage that love for your organization by making it easy for them to flaunt their membership.