

The member onboarding playbook

The templates, scripts, and scorecards behind the first 30 days.

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HOW TO USE THIS PLAYBOOK

One job: a first action, then a habit

Onboarding has one job. Get a new member to do something that matters to them before they close the tab, then turn that action into a habit over 30 days. This guide is the part that didn't fit in a blog post: the actual emails, the prompts, the check-in questions, and the scorecard I'd put in front of a team every Monday.

**Building your first session**

Start with the activation checklist on page 4.

**Emails feel stale**

The four-email sequence is copy and paste, brackets and all.

**Intro threads get no replies**

Eight prompts that produce reply chains, with notes on why.

**Your boss asks if it is working**

The measurement chapter and the weekly scorecard.

THE FUNNEL EVERYTHING REPORTS INTO

Stage 1

Joined

Completed signup, whatever that means on your platform.

Is acquisition working?

Stage 2

Activated

Took an action from your activation list in the first session.

Did the first session work?

Stage 3

Returned

Came back for a second session within seven days of joining.

Did we earn a second visit?

Stage 4

Habituated

Reached your habit threshold inside the first 30 days.

Did a habit form?

ONE REQUEST BEFORE YOU SKIM

Do the activation action worksheet in the measurement chapter even if you skip everything else. Every other tool in this guide points back at it, and it takes about twenty minutes.

 Fillable PDF. Type in it or print it.

Cohort percentages are illustrative sample data. Everything here is something we run ourselves or have watched a customer run.

WHY THE FIRST WEEK DECIDES IT

You lose them in week one. You find out in month three.

When a member churns in month three, you usually lost them in week one. They joined, saw a wall of channels and posts that meant nothing to them yet, didn't know what to do first, and left. The community just doesn't find out for another ten weeks, when someone finally pulls a retention report.

The lag, drawn

The cost of skipping onboarding shows up far from the cause, which is exactly why it stays underinvested.



INSTRUMENT FIRST

Instrument your first week before you optimize anything else. You can't fix what you're measuring on a ninety-day delay.

SIGNAL 1

First-session activation

What percentage of new members took a first action in their first session. If you can't report this, fix it before touching anything else.

SIGNAL 2

Cohort, never aggregate

How many members joined in the week of the 4th, and what share of that group activated, returned, habituated.

SIGNAL 3

Reply speed

First posts receiving a reply within 24 hours, and median time to first reply. The inputs you control this week.

The three signals above are the minimum. The full scorecard is on page 11.

RUN THIS LOGGED OUT

The activation checklist

Run this against your own community, ideally logged in as a brand-new test account, because your admin view has been lying to you for months. Work through it in order. Each item is pass or fail, no partial credit.

ENTRY

- ☐ A new member can join in under a minute. SSO or social login exists, or the community sits behind your product's login so joining is invisible.
- ☐ Nothing asks for information you won't use this quarter. Every extra signup field costs you members you'll never meet.
- ☐ The first screen after joining is your start-here space, not a firehose feed.

THE START-HERE SPACE

- ☐ It answers three things and nothing else: what this community is for, where the answers live, and one prompt to act now.
- ☐ The prompt is a single link or button, not a menu of twelve options.
- ☐ The space is visibly alive. The pinned intro thread has replies from this week, not from the quarter you launched.

THE FIRST ACTION

- ☐ Your prompt asks for something tiny and real. A one-question poll, a reply to this week's intro thread, following the topic they came for.
- ☐ The action produces a visible response. A first post that dies in silence is worse than no post.
- ☐ A human replies to every first post within a few hours during your business day. Put a name and a rota against it.

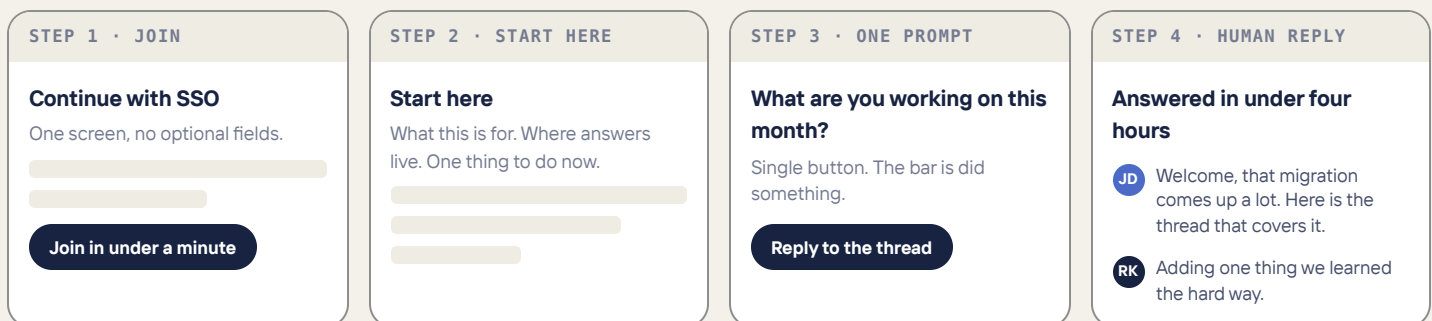
THE TOUR, IF YOU HAVE ONE

- ☐ Every stop is a benefit statement, one per stop. "Post here and a product manager reads it" beats "This is the feedback section."
- ☐ It's skippable, and skipping it doesn't hide anything.

INSTRUMENTATION, THE GATE ON EVERYTHING ELSE

- ☐ You can report, this week, what percentage of new members took a first action in their first session.

WHAT THE FIRST SESSION LOOKS LIKE END TO END



Failed more than three items? Fix entry first, then the prompt, then the reply commitment. Each one gates the next: nobody sees your prompt if signup filtered them out, and a prompt that works only creates orphaned first posts if nobody's answering them.

THE FIRST-WEEK SEQUENCE

Four emails, one idea each

Email carries the first week because a new member isn't opening your community by habit yet. The failure mode is front-loading: one giant welcome email with every link and guideline crammed in, then silence. Keep each body under 120 words, and give each one exactly one link, because two links is a decision and decisions get deferred.

✈ EMAIL 1 · DAY 0, INSIDE AN HOUR

SUBJECT

Your first step in **community name**

Hi **first name**,

You're in. Skip the tour for now, there's one thing worth doing today:

[Tell us what you're working on this month in this week's intro thread](#)

It takes under a minute, and it's how the community starts working for you instead of being another tab.

I read the intro thread every day, so I'll see you there.

[Sender name, real person, real title](#)

[→ Open the intro thread](#)

WHY IT WORKS

It arrives while the reason they joined is still warm, and it asks for one thing. Send it from a person with a replyable address. Welcome-email replies are some of the best member intelligence you'll get, and a no-reply address tells members exactly how this relationship is going to go.

✈ EMAIL 2 · DAY 3

SUBJECT

Where **role**s spend their time here

Hi **first name**,

Quick pointer. Most **role**s in **community name** live in **space name**, where this week people are discussing **live example pulled from the actual space**.

If that's not your corner, reply and tell me what you're trying to get done. I'll point you somewhere better.

[Sender name](#)

[→ Go to the space](#)

WHY IT WORKS

Day one was about acting, day three is about finding their people. The live example matters more than the link, because it proves the space is alive. If you can't automate pulling one, have a human paste it in weekly. It's five minutes.

Brackets are yours to fill. Emails 3 and 4 are on the next page.

THE FIRST-WEEK SEQUENCE

Relationships, then a smaller door

Email 3 hands over the people. Email 4 only goes to members who haven't taken a first action yet. Members who acted should get nothing on day seven, or something better: a digest of what they missed in their first week, if your platform can build one.

✈ EMAIL 3 · DAY 5 OR 6

SUBJECT

Worth following: [name](#), [name](#), and one thread

Hi [first name](#),

Communities are people, so here are two worth knowing:

[Member name](#), who answered 40 questions about migrations last quarter. [Member name](#), who [specific, checkable thing](#).

And one discussion that keeps paying off: [thread title, linked](#).

Follow whoever's useful. That's the whole email.

[Sender name](#)

→ **Open the thread**

WHY IT WORKS

By now they've seen the structure, and this email gives them relationships, which is what retains people. Rotate the featured members monthly and tell them you're doing it. It doubles as recognition, and it primes them to welcome the newcomers who show up in their notifications.

✈ EMAIL 4 · DAY 7 CONDITIONAL SEND

SUBJECT

A ten-second way in

Hi [first name](#),

A week in and no pressure, but if the intro thread felt like too much, here's a smaller door:

[This week's poll is one click: what's your community's biggest bottleneck right now?](#)

That's it. Ten seconds, and the results are genuinely interesting.

[Sender name](#)

→ **Vote in the poll**

WHY IT WORKS

The fix for a member who hasn't acted is a lower bar, never a guilt trip. Note what's absent: any reference to their inactivity, and every phrase in that family. You're offering an easier step, in a tone you'd happily use with a friend.

Sending rules for email 4

Suppress anyone who has taken an activation action. Point it at the lowest-friction action you have, and check the link is still live before the week starts, because a dead poll is worse than no email. Watch your unsubscribe rate by email position and let the data adjudicate.

Four emails in a week sounds heavy until you remember each is under 120 words and one of them is conditional.

INTRODUCTIONS

Prompts that produce replies

"Introduce yourself" produces a name, a company, and silence. An introduction nobody answers is a small rejection, often the member's last post.

"What are you working on this month?"

The workhorse. Time-bound, so you get specifics, not a bio.

"What's the tool you'd defend in an argument?"

Mild controversy, low stakes. People reply to disagree.

"What did you Google this week that you wish a person had just told you?"

Real questions disguised as introductions.

"What's one thing you shipped recently that you're quietly proud of?"

Permission to brag, and congratulations are easy to write.

"Unpopular opinion about your field : go."

Higher energy. Use it once the thread has regulars.

"What's the best advice you ignored, and how did that go?"

Story-shaped, and stories get read to the end.

"Show us where you work."

For informal communities. Nearly zero effort to answer.

"Who's someone in field more people should know about?"

Members introduce members. Sometimes the person shows up.

OPERATING RULES

- Refresh the prompt weekly or biweekly. A stale prompt reads as a dead community.
- Seed the first two or three answers with staff or superusers so no member is ever first.
- Answer every single one, because the reply is the product.

THE WELCOME SPACE, TOP TO BOTTOM

community.example.com/start-here

1 PINNED, AND THE ONLY PINNED POST

Start here

Get answers from people running the same playbook. Two sentences written for the member, not for your brand deck.

Reply to this week's intro thread

 Two or three spaces that matter, each with a benefit

 Who's here to help

JD RK MC AT

2 How things work here

House rules in one screen. Culture beats legalese, so the long policy sits behind a link. What to expect: reply speed, when the team is around, where announcements land.

3 The live surface

This week's intro thread, visible without scrolling past archives. Recent activity from the wider community, so the space demonstrates life instead of claiming it.

Deliberately not here: the changelog, feature announcements, the events calendar. Anything serving you before it serves a day-one member lives one click away.

When Webflow consolidated a developer community of 50,000+ onto one platform, part of what they were buying was an arrival experience coherent enough that a new member knows where they are and what to do first.

ONE PAGE, AND IF IT DOESN'T FIT, YOU'VE OVERBUILT IT

The buddy program

A named person answering your questions in week two is the strongest belonging signal there is, and that's what a buddy program manufactures. Skip the open call: announcing that you need greeters recruits enthusiasm, and what you want is demonstrated behavior.

Selecting buddies

- Answer questions rather than just posting. Look at replies given, not content created.
- Show up consistently. Twelve quiet weeks of participation beats one loud month.
- Write with warmth. Read ten of their replies. Tone is the whole job, and it doesn't coach easily.
- Have tenure. Six months or more, enough to know where things live and what the culture is.

The ask, put it in writing

- Welcome your assigned new members with a personal reply or message in their first week.
- Reply to your members' first posts within a day. You're the safety net under the team's few-hours target.
- Flag anyone who seems stuck or about to bounce, so the team can intervene.
- One optional office-hours appearance a month, if the community runs them.

Cap it at three to five new members per buddy per week. An overloaded buddy writes copy-paste welcomes, and members smell copy-paste from orbit.

Recognition, the part teams skip

- A visible badge or title. Status inside the community is the currency the community actually mints.
- A direct channel to your team, and early access to features or roadmap where you can offer it.
- A quarterly personal thank-you from a human, specific about what they did, and their name in your recap posts.

 STATUS BEATS MERCHANDISE

Housekeeping

- Review the roster quarterly. Let quiet buddies step down gracefully.
- Backfill from your next tier of active members.
- A program with absent buddies is worse than none, because now the silence has a name attached.

HOW TO INVITE

Invite personally and privately. "You're one of the people who makes this place work, and I'd like to make it official" converts far better than a signup form, and the flattery is true. Start with five to ten: small enough to know each one, large enough that a vacation doesn't break coverage.

Program owner

Buddies at launch

Weekly cap per buddy

Roster review date

30, 60, AND 90 DAYS

The check-in scripts

Automated and lightweight is fine. What matters is asking the right question at each stage, because the member's situation changes under them. At day 30 you're diagnosing onboarding, at day 60 fit, at day 90 you're recruiting. Two or three questions maximum, from a real person: every question past three halves the response rate.

DAY 30	DAY 60	DAY 90
Did onboarding work? You joined community name about a month ago, and I'd love two minutes of honesty: What were you hoping to find or get done when you joined? Did it happen? And on a scale from very hard to very easy, how easy was it to get started here? WHY THIS QUESTION The first question is the entire diagnosis. If their reason and your community connected, you'll hear it. If they can't remember why they joined, that's a targeting problem upstream of onboarding, and no email sequence fixes it. Track the ease trend rather than the absolute score.	Is a habit forming? Two months in. Different question this time: When you do come back to community name, what do you come back for? And is there anything or anyone you expected to find here that you haven't? WHY THIS QUESTION The phrasing is deliberate. "When you do come back" works for the daily regular and the drifted member alike, without accusing either. The second question surfaces gaps you can act on the same day.	From member to contributor Three months, so you've seen how this place works. Last set of questions from me: How likely are you to recommend community name to a peer, and what's the main reason for your score? If you disappeared for a month, what would you miss? And is there something you know that newer members keep asking about? I'm looking for people to feature, and you keep coming up. WHY THIS QUESTION Day 90 is the earliest I'd ask the recommend question. NPS on day seven is scoring a first date. "What would you miss" tells you what the community's actual product is, in the member's own words. The last question is the recruiting pitch.



Close the loop on every answer that names a fixable thing

A member who tells you what's broken and then watches you fix it sticks around longer than one who never had the problem. That's what being heard does.

Who sends the check-ins

Send channel

Where answers get logged

THE TWENTY-MINUTE WORKSHEET

Define your activation action list

Activation is "took a real action in the first session," but "real action" is a list you have to write down. List every low-friction action a new member can take, then score each on two axes: effort for a day-one member, and how strongly it predicts they'll come back, per your data or, initially, your judgment.

Candidate action	Effort	Signal	On the list?
Votes in a poll	Very low	Moderate	Yes
Follows a space or topic	Very low	Moderate	Yes
Reacts to a post	Very low	Weak	No, too cheap
Replies to the intro thread	Low	Strong	Yes
Posts a question	Medium	Strong	Yes
Completes profile	Low	Weak alone	No, track separately
Answers someone's question	High	Very strong	Yes, rare on day one
Books or attends an event	Medium	Strong	Yes

Keep the list to four to six actions

Too short and you undercount activation. Too long and you're counting pulse checks as engagement. Reactions are the classic trap, easy to count and nearly meaningless as a day-one signal. Track them, sure. Keep them out of the activation definition. Revisit the list quarterly: once you have 90+ days of data, check which actions actually predicted return visits in your community and re-score the signal column with numbers instead of judgment.

WRITE YOURS HERE

Activation action 1

Activation action 2

Activation action 3

Activation action 4

Activation action 5

Activation action 6

Everything else in this guide points back at this list. The four stages it feeds are on page 2; the scorecard that reports it is on page 11.

THRESHOLDS AND THE WEEKLY REPORT

Pick a threshold, then run the scorecard

The habit threshold is the one teams agonize over, so here's my position: pick something defensible, write it down, and recalibrate from your own data in 90 days.

A good default

Three or more visits in a seven-day window without an email driving them, hit at any point in the first 30 days. The "without an email" clause matters. A member who only shows up when summoned hasn't formed a habit, your send schedule has.

Our habit threshold

Recalibrate on

Measure by cohort, always

How many members joined in the week of the 4th, and what percentage of that group activated, returned, habituated? Aggregate numbers smear your product launch spike into your quiet weeks and tell you nothing about whether onboarding improved.

THE WEEKLY SCORECARD, REVIEWED IN FIFTEEN MINUTES

Metric	Week 1	Week 2	Week 3	Week 4	Trend
New members joined					
Activation rate, first session					
Week-one return rate					
Habituated by day 30, trailing cohort					
First posts replied to within 24h					
Median time to first reply					
30-day check-in response rate					

NOTES ON READING IT

- The habituated row reports on the cohort that joined 30+ days ago, so it lags by a month. Label it clearly.
- The two reply-speed rows are your leading indicators, the inputs you directly control this week.
- When activation dips, check reply speed first. In our data they move together, and reply speed is the one a team can fix by Friday.

The discipline is the value. A mediocre scorecard reviewed weekly beats a beautiful dashboard nobody opens.

TWO OR THREE ATTRIBUTES, NOT SIX PERSONAS

Segment on what changes the first move

Personalization advice usually arrives as a persona deck with six laminated archetypes. Skip it. The test for an attribute is brutal and useful: would knowing this change the first action you prompt, the space you point to, or the buddy you assign? If not, it's a reporting dimension, not a segment.

✔ THESE THREE USUALLY PASS THE TEST



Role or job to be done

An admin configuring your product and an end user trying to get answers need different first actions. This is almost always attribute number one.

Your attribute 1



Relationship stage

A trial user, a brand-new customer, and a three-year veteran arrive with different questions and different patience.

Your attribute 2



How they arrived

A member who came from a support ticket has an urgent problem. A member who came from your newsletter is browsing.

Your attribute 3

WORKED EXAMPLE: A MID-MARKET B2B SAAS CUSTOMER COMMUNITY

Members are customers, and you can see role and customer stage from your CRM at signup. Two attributes, six segments, but only four you'll actually build for.

Segment	First action to prompt	Day-3 email points to	Buddy assignment
Admin, new customer	Post your setup question in the implementation space	Implementation space, live example	Buddy who's an experienced admin
Admin, established	Follow the product-updates and advanced-config topics	Advanced tips space	Optional, low touch
End user, new customer	Vote in the getting-started poll, then the intro thread	Role-based how-to space	General buddy pool
End user, established	Follow the topics matching their product usage	Power-user space	None, invite to events instead

WHAT CHANGED, AND WHAT DIDN'T

The email sequence structure is identical for everyone: same days, same one-idea rule, same conditional day-seven send. What changes is the noun inside each email. That's the trick that keeps segmentation from eating your calendar: one path, swappable parts, not four parallel onboarding programs that each drift out of date on their own schedule.

Company size, industry, and geography are all real attributes, and none of them change the first action, so none earn a segment. When HiBob built their customer community, the bar was making it feel like a natural extension of their product.

THE OTHER SIDE OF THE EXPERIENCE

What your team does, day by day

Everything so far describes what the member experiences. This is what your team does to run it, assuming one owner spending 30 to 60 minutes a day, which is roughly what it takes at small-to-mid scale. Days count from the start of your operating month, not per member. Member-facing timing is handled by your automated sequence.

EVERY WORKING DAY

The 15 to 20 minute block

- Reply to, or assign a buddy to, every unanswered first post. Non-negotiable.
- Scan yesterday's joins for anyone stuck at zero actions.
- Answer replies to the welcome email.

DAY 1	DAY 2	DAY 3	DAY 4	DAY 5	DAY 6	DAY 7
1 Post this week's intro prompt. Seed two answers.	2 Assign new joiners to buddies. Confirm each acknowledged.	3 Refresh the live example in the day-3 email.	4 Review the day-7 nudge queue. Is the low-bar action still live?	5 Scorecard update. Fifteen-minute review.	6	7
8 New intro prompt. Rotate, don't repeat.	9 Check buddy load. Anyone over five? Rebalance.	10 Read every 30-day check-in reply. Close the loop today.	11	12 Scorecard update and review.	13	14
15 New prompt. Pick next month's featured members and tell them.	16 Self-audit: run the first-session checklist on a fresh test account.	17 Mine the 60-day answers for content and space ideas.	18	19 Scorecard update and review.	20	21
22 New prompt. Check the pinned post is current.	23 90-day cohort: send personal contributor invitations.	24 Draft next month's poll so the day-7 email never points at a dead link.	25	26 Scorecard update and review.	27	28
29 Monthly retro, 30 minutes. One experiment, one thing to stop.	30 Publish the recap post. Name the buddies.					

- A violet marker means a task sits on top of the daily block that day.

Two observations from running versions of this. The days that get skipped first are 10 and 16, the check-in reading and the self-audit, because neither has an external deadline. They're also the two with the highest information yield. And the calendar assumes automation is doing the member-facing sends. If you're manually mailing welcomes on day one, wire that first.

EVERY ONE OF THESE COMES FROM A REAL COMMUNITY

Common failure modes, and the fixes

The front-loaded welcome email

THE TELL

One 800-word day-one email carrying everything, then nothing for a month.

THE FIX

The four-email sequence, one idea per send. If a stakeholder insists, put the rest behind one link and show them the click number.

The generic intro thread

THE TELL

"Introduce yourself" with forty entries, each a name and a company, replies near zero.

THE FIX

Specific prompts, seeded answers so nobody's first, and a reply to every entry. If you do one thing, do the replies.

The gated onboarding flow

THE TELL

A mandatory wizard between signup and the community. Someone built it with love, and it's a wall.

THE FIX

Make every step optional and discoverable. A member inside with an empty profile is recoverable. One who bounced off step three is gone.

Gamifying everything

THE TELL

Points on every click, a leaderboard, streaks. Activity climbs while conversations thin out.

THE FIX

Aim recognition at answering, welcoming, and teaching. Rewards for volume produce volume. Rewards for generosity produce community.

Onboarding nobody revisited

THE TELL

The welcome email names a space renamed in March. The tour's second stop is a 404.

THE FIX

Day 16 on the operator calendar. Run your own onboarding on a fresh account monthly. The cheapest quality bar in this guide.

Onboarding as a solo project

THE TELL

One community manager hand-welcoming every member. It works until they take a vacation.

THE FIX

The buddy program, plus automation for anything that doesn't need a human. Spend the human touch on the first reply.

Connecting onboarding to revenue

Community teams that report activity get asked why the budget exists every planning cycle. Teams that report business impact get asked what they'd do with more. Activation is the first community signal that means anything downstream, and it can't do that work trapped inside the community platform. Get member-level activity, joined, activated, last active, contribution level, onto the contact and account records your sales and CS teams already work from. Then questions that used to be vibes become queries. Do accounts with activated community members renew at a higher rate? You won't like every answer, and that's rather the point. The answers you don't like are the roadmap.

SEE IT RUNNING

Onboarding mechanics on top of a CRM that already knows

Bettermode ships community activity into your CRM natively. It's how InvGate connected community engagement to deal and customer records through the HubSpot integration. We'll walk through real examples, including how teams like Webflow and HiBob structure theirs.

[Book a demo](#)

If you only take the twenty-minute version of this playbook: write your activation action list, put the scorecard in front of your team on Monday, and answer every first post. The rest is compounding. Prepared by Bettermode as a practical planning resource; product views and cohort figures are illustrative and use sample data.