

# The Member Journey

## Period of Instruction – Convention of Kansas State Chapter 2024

*Parts will alternate between the Organizer and a member of the Membership Committee*

### Slide 1:

**This plays while the presenter gets set up.**

### Slide 2:

Every member has a story and we all make a difference in the P.E.O. story of others. In this presentation we will look at this journey that we all have taken and the one that a potential new member takes when becoming a P.E.O.

When and how did you become aware of P.E.O.?

Where were you when you received your invitation to become a member? How did you feel?

What was your ceremony of initiation like?

Who helped you become more involved in your chapter?

These questions likely evoke warm and fuzzy emotions for you. But again, each member's experience is different from the next.

There may be some similarities, but ultimately, the story you share is unique to you. Our experience, our member journey, is distinctly ours.

### Slide 3:

Today we will look at the five basic stages experienced by P.E.O. members of all backgrounds. We will discuss these five stages in the P.E.O. member journey and your impact. We will look at what happens at each point, discuss simple steps to enhance the experience, and provide you with a framework you can apply.

Stage one is Awareness – how you first learned about P.E.O.

Stage two: Invitation – when and how you received the invitation to become a member.

Stage three: Initiation – what your initiation ceremony was like.

Stage four: Onboarding – how your chapter helped you get more familiar with P.E.O. and involved.

And Stage five is: Growth – why you stay connected to P.E.O.

As we explore the P.E.O. member journey and the stages of experience, there are three key points to be made.

### Slide 4:

The first key point is that **members have choices**.

As you look at each stage of the member experience we are exploring today, it is important to recognize that these are not just arbitrary points. Rather, we must understand that it is at each of these key points in her journey that a member answers a critical question. Her answer determines what she does next.

For **awareness**: The choice is, do I want to be a part of this organization or not?

**Slide 5:**

With the invitation: Should I say yes and send in my acceptance or not?

**Slide 6:**

And then during Initiation: At this point, we are asking ourselves, did I make the right choice? And that answer shapes the next part of our experience which is:

**Slide 7:**

Onboarding: Will I get involved in my chapter or not?

**Slide 8:**

With growth: Will I stay and grow, or will I go? And among each of these stages, another question is asked along the way – would I invite another woman to become a member or not?

Each of us at least subconsciously has asked ourselves these questions and made our choice, and your choices led you here today. Let's take a closer look at these. In our exercise, the first question I asked was – when and how did you become aware of P.E.O., which again is when a member's experience starts to take shape. The awareness stage is before you are initiated, and you are sizing up the organization and how or if it fits into your life – do I want to be a part of this, or not? As we are engaged with and working on our membership plans, strategies and goals, consider that the point at which someone learns about P.E.O. could occur at any time in her life.

P.E.O. is not a secret. Do your chapter members have a small “elevator speech” prepared to share with others?

**Slide 9:**

Let's all read this together:

*“P.E.O. – Where women motivate, educate and celebrate women.”*

This is the new mission statement adopted by the International Executive Board in April 2024.

Talk about P.E.O. all the time. When someone asks you, “What have you been up to lately?” How often do you answer, “Well, I've been with my P.E.O. sisters and this is what we have been working on.” This just may spark an interest in our sisterhood and lead to further conversations about possible scholarships, loans and grant applicants, interest in our fundraising or, again, maybe even possible membership. Remember, P.E.O. is not a secret.

**Slide 10:**

How old were you when you first learned about P.E.O.? Raise your hand if your awareness milestone involved observing your mother, aunt, grandmother or other influential woman in your life when you were a child or teen. How do you make others in your life aware of P.E.O.? How do you talk about P.E.O.? Do your members have that small “elevator speech” about P.E.O. like our mission statement?

Awareness can happen at all ages. It can occur at college, during our careers, in our social lives, and later in life as well. As you assess the member experience in your chapter, take this into consideration. Do your membership plans and outreach involve and connect with others, your members and your communities in a positive way? For example, does your chapter encourage children and grandchildren to help with fundraisers and booths? Are the significant others in your life encouraged to participate with the chapter in community service and connect through other outreach or social activities? Paying attention to this not only addresses the awareness stage but also attends

to members who are balancing families and careers with P.E.O. involvement, which can lead to improvements in retention.

Remember each stage, awareness, invitation, initiation, onboarding and growth involved the member making a choice.

**Slide 11:**

When it comes to invitation, the choice is – do I say yes or no? The information the prospective member receives beforehand and how they receive it influences their decision. When introduced to other members of your chapter, do they feel a warm welcome? Are they given the opportunity to ask all the questions they might have? Are they provided a copy of our constitution, the P.E.O. Record, our state newsletter, your chapter yearbook? When they are invited are you using our beautiful imprinted invitation or a copy of one? Does your chapter follow up after the invitation is received to provide pre-acceptance counseling? Put some thought into the common questions asked by our prospective members and how you are ensuring that the pre-acceptance counseling committee members within your chapters are equipped to answer those questions. Where do they get their information, how do they get their information and in what format?

**Slide 12:**

At initiation, the ceremony is rich and beautiful. It is a memory that members should be able to reflect upon fondly and cherish for a lifetime. It needs to be rehearsed so that the initiate doesn't feel like an afterthought or just part of a script, which could cause them to question if they made the right choice. How well your chapter performs the ceremony is in your control. There are online resources that offer guidance on the ceremony. How comfortable are your members with the ceremony? What questions do you have? Does each time the ceremony is performed invoke quiet reflection by each member, joy for the new initiate and/or comments from the initiate about what a beautiful ceremony that was? Reach out to a state officer for advice on making it meaningful for every woman, every time.

**Slide 13:**

In the last few years, International has developed several online tools to support your chapter's onboarding efforts. There is now a virtual orientation new initiates can participate in, they receive a 12-month new member email drip with bite-sized post initiation counseling tidbits, and chapters also have the option to purchase and give new member welcome kits to your initiates. When you are onboarding your new initiates and conducting the ever-important post-initiation counseling does your chapter continue a concerted effort to include this new sister in all chapter activities? Do you offer rides to the new initiate for the first few meetings to ensure she feels welcome? Do you continue to introduce her to new sisters as different ones come into her new chapter? Do you ask her to serve on a committee and/or become involved in a small group? Is someone assigned to sit with her at the meetings to help her learn our meeting format?

**Slide 14:**

The fifth stage of the P.E.O. member experience we're discussing today is growth. By this stage, they've made the choice to become a member, and they are getting more involved. Then comes the request for dues. Every year, we all make a choice. To stay or to go? We hope the answer comes with no hesitation and is an enthusiastic yes; I want to stay and grow! That should be the goal of every chapter in working with their membership throughout the year. Outside factors beyond a chapter's control will always be a factor, though. Perhaps this member has had a life change like a move, a health issue, or a career change. Maybe they are finding themselves very busy these days and having to choose what to keep and what to let go. The list is endless, and it will compete with the

choice they make. Chapters influence this decision. We always have time for what's important to us. How your chapter has shaped that member's experience determines the choice she makes.

Let me say that again, how your chapter has shaped that member's experience determines the choice she makes.

**Slide 15:**

The second key point today is that experiences can be shaped.

"A story last year went viral about a woman who contacted Chewy after her dog died. She had an unopened bag of dog food and wanted to know if she could return it to the company. Here's what Chewy did in response. They gave her a full refund, told her to go ahead and donate the dog food to a local pet shelter, and sent her flowers with a gift note signed by the representative she'd talked with. When the woman replied to the company with a thank you, they responded, "We hope these flowers will help keep your spirits up."

This story is not just a one-time response by Chewy to a customer. This happens regularly when Chewy learns about the passing of their customers' pets. In fact, they have been known to not only send flowers but they have even been known to send a painting of the pet to the customer as a keepsake. When asked about these sentimental gifts and responses, Chewy said, "For many customers, their pet is a primary companion in life, and when they lose their fur baby, they may feel alone and in need of someone to lean on. In those moments, they understand that Chewy is also part of their family, and they are so grateful."

Chewy shaped that customer's experience by being there for them, individually, at a stage in that customer's life that was very sad and difficult for them. Even if the customer does not have a pet anymore, you can guarantee they recommend Chewy to anyone with a pet or in need of pet products."

**Slide 16:**

Let's translate this to the P.E.O. member experience and the five stages we just discussed. There are three elements of the Chewy story I want you to think about. One is the emotional aspect. A simple refund or form letter response would have been sufficient for the woman's inquiry about returning her dog food. Instead, the company took time and invested money in acknowledging her grief. They reached her emotionally.

Second, there was connection. Her request was met with not only the refund, but she was provided with a feel-good option to donate the dog food to the pet shelter. She no longer needed to worry about the money or wasting the food, or how to ship back a package of dog food. The company was responsive and connected to her by making sure that there was complete resolution to her questions and needs so she could focus on what was most important. She felt like she could follow-up with a reply to thank them. She knew that they were listening, and she was proven correct when they responded with another personalized message. They kept the conversation going and stayed connected.

Third, they were authentic. It wasn't about them as a company, it was about her as a customer. She was not just another number. In reality, she is part of a large database. But representatives at the company are charged with making sure that she knows that she matters to them. They individualize their response. They personalized their message with the representative's signature – another human being she'd interacted with at the company. She was a pet owner dealing with something upsetting, and the company's authenticity was so special to her that she posted about her positive experience on social media. You can imagine what that did for the broader awareness of the company.

Emotion. Connection. Authenticity. Pair those with the five stages of the P.E.O. member experience we've discussed and consider how they impact the choices that come with each. Start to think about how you might work with your chapter in your own membership strategies.

**Slide 17:**

The third point today is that everyone needs to feel like they belong. Maslow's hierarchy of needs involves the need for love and belonging. The bonds of sisterhood satisfy a need to be loved and to belong, and it is among the greatest of the reasons to become a P.E.O. member and to stay active as a member.

Like the member experience, members, too, are unique. No two members are the same. Let's talk about some common member needs but through the lens of two different groups of members. In recent years, International held listening sessions. The first set was to learn about our older members and their needs. The second set of listening sessions involved members aged 35 and younger. Both groups of members expressed that they wanted to be involved with P.E.O. but tend to feel disconnected when they are unable to participate in meetings. For our older members, the common obstacles include health, technology, and driving. For our younger members, their struggles are often related to meeting times, location, and availability. There really isn't a one-size-fits-all solution to address all of these needs among both of the groups. We would be better off seeking multiple solutions to more directly reach the individuals we intend. Remember, needs change over time, and the solutions you have today may not be as effective tomorrow. As you think about the member journey, consider how your chapter's practices can be diversified to meet a variety of needs.

Since the global pandemic, according to NPR, time with our friends has declined 57%. Many women are finding they are lonely. More and more of us are more than ever attuned to the importance of friendship. This gives P.E.O. a unique position to let others know: you belong. We will be here to support you and provide a loving community. Will your chapter rise to this occasion?

**Slide 18:**

In the story about the pet food, we learned how a customer was made to feel special, and in the CEO's response, he said, "In those moments, they understand that Chewy is also part of their family." How can you ensure that P.E.O. is an integral part of your member's life?

Personalization and customization go a long way in building the familial connection. What if a member received her yearbook with her name printed on the cover? What impression would that send? Other suggestions might be ensuring members have nametags at meetings, incorporating relationship-building activities before or after meetings and utilizing the suggestions provided by the membership committee's messaging: Every Sister is a VIP, which are designed to be simple and personal. Every chapter has the ability to make every member feel special and to know that they matter. Think about your chapter's practices in this regard. What more can you be doing?

All of these efforts and others help each member feel that important sense of family.

**Slide19:**

We've talked about five stages in the P.E.O. member experience and the questions members ask at each. We've discussed how experiences are shaped through emotion, connection, and authenticity. And we talked about the importance of belonging and how customizing and personalizing your outreach keeps a member growing within P.E.O. As you return to your chapter, this is a framework you can use to influence your members' journeys.

Ask yourselves, what do each of these key stages in the P.E.O. member experience look like in your chapter – what occurs that impacts the choices each of your members make? How do you shape the member experience through emotion, connection, and authenticity? How are you applying outreach to your members in ways that feel individual to them?

**Closing Slide 20:**

The member journey is unique to each member, and it is through you and your leadership that your chapter can make it exceptional. Tap into the concepts we explored today and expand your efforts. You make a difference.

Thank you for your time today.

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