Explorer Onboarding Checklist

Name:

Address:

Phone:

Email:

Notes:

Date Explorer Check Received:

Deadline to become Member:

Buddy Assigned:

- Buddy to call within 48 hours
    - Intro self and share best way to reach you
    - Learn about Explorer - What prompted your interest? Current living situation? What are they most excited about regarding our community?
    - Share dates for upcoming events, meetings, etc.
    - Explain Zoom
    - Give heads up that they will soon be receiving group emails
    - Explain Expectations
        - Hold back, observe, make list of questions
    - Give Orientation meeting info
        - If scheduled, give date and details
        - If not scheduled, let them know when and whom they will hear from
    - Ask for short bio or get it over the phone
        - Ask if they are okay w/ this being shared on Facebook, Newsletter, and other community communications.
    - Schedule next call or meet in person if possible

- Follow up call w/ email
    - Give your contact info again
    - Include current Member Roster
    - Important dates to note
    - Include Zoom link (suggest they cut and paste it into a contact card for Skagit Cohousing)

- Make sure they are put on the shared Community email and/or have access to shared site.

- Follow up with another call once we know they are on the shared drive and find out if they got on okay. Any questions or need help?

- Send email to Community members welcoming and introducing new Explorer and include a photo if possible.
    - Let Facebook administrator know if it is okay to share this on Facebook.

- If there is a Member you think Explorer would especially connect with, arrange connection.

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