

Onboarding process

Email templates

Template 1: Reminder email for members who have completed the onboarding process but haven't yet joined Time and Talents.

Kia Ora,

We noticed that you haven't joined the online trading site (Time and Talents), to set up your account yet. Please let us know if you are having any issues in doing so, or wish to be removed from our contact list.

Here's what you need to do to sign up:

1) Sign up

- a) Head to: tnt2.hOurWorld.org Time and Talents the timebank members online software platform
- b) Click the **Forgot Password** button on the login page
- c) Follow the instructions to reset your password.

Once you have successfully logged in your Timebank coordinator will be notified and enable you as a user within a day or two. You will receive 2 time credits for joining!

2) Trading Post

You'll now receive a version of the Trading Post with peoples contact details. You can contact them directly if you would like to trade with someone. ***Let me know if you don't get it!*** In gmail it tends to go to Promotions or Spam.

3) Start trading

We recommend everyone starts by listing one offer (something you enjoy or find easy, or already do) and one request (we suggest something that would make your life easier or more enjoyable).

4) Make a contribution to the running costs of the timebank if you haven't already

We run on a sliding scale, with a suggested amount of \$20 but you are welcome to pay as you please.

Pay via internet banking into account:

Newtown Community Centre

06 0574 0236602 50

reference: membership

code: your initials and surname

OR Click [here](#) to access POLi and make a quick payment online

reference: membership

code: your initials and surname

5) Join the super-secret squirrel Facebook group JUST for members.

[Click here to join!](#)

TOP TIPS FOR A HAPPY TRADE

One: discuss ALL details beforehand

Swap phone numbers. Discuss any costs involved. Be clear about how small or large the job will be and what skill level is required.

Two: be timely

Arrive on time – not early or late. Let the person know if something changes – no one likes being stood up. You can log 0.5 time credits for the time set aside for a missed trade.

Three: agree on trade time

Agree together on how much time the trade took BEFORE you leave the trade, including any travel time, and who will log the trade.

Four: be kind, courteous and generous

Offer the person a glass of water or a cup of tea. If they stayed for 50 minutes, make it 1 hour. Understand that people are doing their best.

Five: reply to people

When someone gets in touch to trade with you, make sure you always respond within a week even if it is to let them know that you are too busy at the moment. People become very despondent about trading if they don't get replies!

6) Have fun!

Be sure to keep in touch. I love hearing everyone's trading stories. And don't forget I'm always here to help out with any time bank related issues.

Template 2: Email for members who have completed all the steps to becoming a member of the Timebank

Kia Ora,

Great news! You're now a fully fledged member of the Wellington Timebank.

Here's what you need to do:

1) Join the online trading site to set up your account (completed)

- a) Head to: wellingtonsouth.timebanks.org Community Weaver online TimeBank program
- b) Click the **Join** button in the Login box (top far left corner)
- c) Follow the instructions!

Once you have joined up I will be notified and enable you as a user within a day or two.

2) Trading Post

You'll now receive a version of the Trading Post with peoples contact details. You can contact them directly if you would like to trade with someone. ***Let me know if you don't get it!*** In gmail it tends to go to Promotions or Spam.

3) Start trading

4) Pay the membership fee if you haven't already

We suggest \$20 but you are welcome to pay as you please. Online transfer available with account Newtown Community Centre 06 0574 0236602 50 reference: membership OR Click [here](#) to access POLi and make a quick payment online.

5) Join the super-secret squirrel Facebook group JUST for members.

[Click here to join!](#)

TOP TIPS FOR A HAPPY TRADE

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Swap phone numbers. Discuss any costs involved. Be clear about how small or large the job will be and what skill level is required.

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Template 4: Email for members who sign up to the Timebank through community weaver instead of the main link. The main link available on our website is linked to the primary membership database and contains all member records. Therefore all members are required to sign up this way.

Hi there!

Thanks for signing up to the Wellington Timebank Community Weaver trading page. If you could fill out an online membership form that would be great!

Then we can get you processed and on the way to becoming a full Wellington Timebank member.

<https://docs.google.com/forms/d/e/1FAIpQLSfhYN1Df-7WJoljvxSTiApaVj9TukNwFM0dm6dozljt52nXyw/viewform>

Template 5: Email invitation to orientation

Kia ora,

Thanks for signing up to the Wellington Timebank

The next step is to come to our orientation session. We offer the choice of coming into our monthly orientation, or getting in touch and organising a time that suits you during our hours.

Orientation sessions are on the <insert date> - <insert venue>. Check out when the next one will be <insert FB link>. [Make sure you let us know if you are coming](#)

If you need to arrange a different time or feel uncomfortable about joining in a group just let us know. We are normally in the office Monday 10am-4pm, Wed 1pm-6pm and Tuesday & Thursday 11am-4pm.

You'll need to bring with you:

- A photocopy of an ID for a Ministry of Justice - Request for Criminal Conviction History (Or bring a completed MOJ check from within the last 6 months)
- Passport, drivers licence or firearms licence - We can photocopy it if we are at Newtown Community Centre (If you don't have one of these we need someone to ID you using a special form)

We do a background check although having minor, past convictions does not exclude membership.

- Membership Fee - we run on a sliding scale model, where you can pay what you can afford. We recommend that new members pay \$20, however this is up to your discretion. Online transfer available with POLi by clicking [here](#). OR bank transfer to: Newtown Community Centre 06 0574 0236602 50 reference: membership.
- Ideas about what can offer and what you might like to receive.

Hopefully see you very soon!

Template 3: Reminder email for members who haven't made it to orientation

Kia ora,

We have noticed that you signed up for Wellington Timebank and never made it to an orientation!

Our next orientation will be March the 19th at 5.30pm at the Newtown Community and Cultural Centre. You are also welcome to make an appointment with Nuzha, our coordinator, anytime that suits you within her hours (see below).

We would love it if you come along so we can move forward with your membership.

If you are no longer interested in being a part of Timebank, please let us know, so we can remove you from our contacts.

Template 6: Reminder email to send to a referee suggested by a member

Kia Ora ,

I am writing because TXX has given your name as a referee for their membership at the Wellington TimeBank. This can be done using our online form here: <https://forms.gle/fYEJDRAAnRa7JCNXT8>

A bit about Timebanking

Timebanking is a community of people who exchange their skills and services for time. For every hour a member spends helping someone else out, they earn a time credit which they can use to access the skills of other people in the Timebank.

Timebanking builds relationships and trust in communities and enables people to have their needs met, it is based on reciprocity and recognises that everyone is valuable in a community and has something to offer.

Because members will be going into each others houses etc, we are doing referee checks to make sure that everyone is safe.

Thank you!

Template 7: Email for members who have completed all the steps to onboarding except submission of an MoJ check.

Kia ora,

I've spoken to both of your referees but am still waiting on your Ministry of Justice check. However, that doesn't need to stop you from getting started, so...

You will start receiving the weekly Trading Post on Fridays without peoples' contact details. If you would like to trade with someone, just contact us and I can link the two of you up.

Once we hear back about the police check you will be granted access to the online trading site and can organize your trades independently.

Also, if you haven't paid your membership fee yet please remember to do so at:

Newtown Community Centre 06 0574 0236602 50 reference: membership

OR via POLi by clicking [here](#)! We suggest \$20 - however you are welcome to pay as you please.

Please let us know if you don't start receiving the Trading Post as that means it may be going to junk mail

Have fun!

Template 8: Email for people who have expressed an interest in Timebank

Kia Ora

Thank you for expressing your interest in Wellington Timebank! We're always looking to grow our community.

Timebanking is a community of people who exchange their skills and services for time. For every hour a member spends helping someone else out, they earn a time credit which they can use to access the skills of other people in the Timebank.

Timebanking builds relationships and trust in communities and enables people to have their needs met, it is based on reciprocity and recognizes that everyone is valuable in a community and has something to offer.

If you would like to join our community, share your skills and services, and meet some amazing people, here's a link to the online membership form-

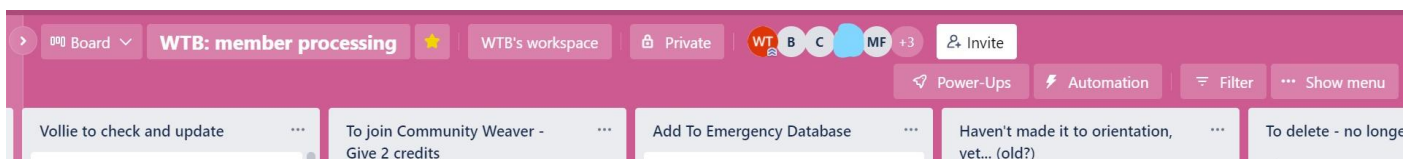
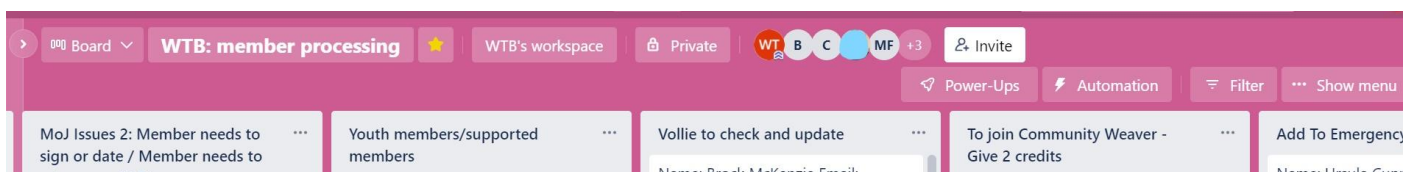
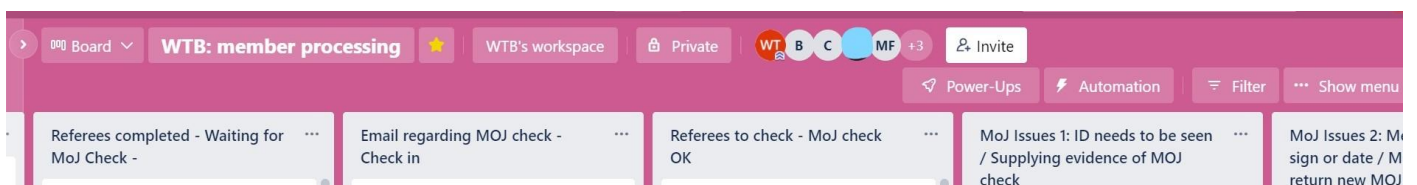
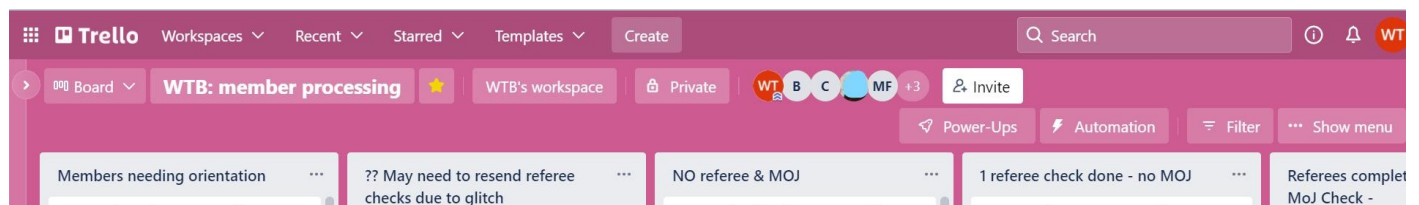
<https://docs.google.com/forms/d/e/1FAIpQLSfhYN1Df-7WJoljvxSTiApaVj9TukNwFM0dm6dozljt52nXyw/viewform>.

If you have any questions related to Timebank or the membership process, feel free to send me an email.

We look forward to having you on board!

Trello examples

Below is an example of our trello board. Groupings are made based on our onboarding process (shown in grey) through which members move through depending on which stage of the process they are in.



Below is our checklist for each individual member

15%

☒ ~~Send online signup email~~

☒ ~~Add to mailchimp - NEWSLETTER~~

☐ ORIENTATION

☐ Paid

☒ ~~Create gmail contact profile~~

☐ Enter on Contacts spreadsheet - Pending

☐ ID for MoJ

☐ MoJ sent

☐ Add to mailchimp Timebank Members - NO CONTACT

☐ Send interim update email

☐ MoJ CHECK OK

☐ Update contacts spreadsheet including stats

☐ Welcome email (includes CW details)

☐ Mailchimp Timebank Members - change to Full Member from No contacts

☐ Send membership pack

☐ Add to Emergency Database

☐ Update community weaver - 2 credits for joining + neighbourhood

☐ Make follow up phone call

☐ Referee #1 Check Recieved

☐ Referee #2 Check Recieved

Add an item

☒ Checklist

☐ Dates

☐ Attachment

☐ Cover

☐ Custom Fields

Add dropdowns, text fields, dates, and more to your cards.

Start free trial

Power-Ups

+ Add Power-Ups

Automation

+ Add button

Actions

→ Move

☐ Copy

☐ Make template

☐ Watch

☐ Archive

☐ Share

Below are the zaps created through Zapier that allows linking of the membership sign-up form to all the other automated processes that occur when a potential member signs up.

Select Zaps

+ Create Zap

☐



Add new sign up to TB newsletter

On 

...

 Owned by **Wellington T.** • Updated **February 09, 2022**

☐



Create Google Contact

On 

...

 Owned by **Wellington T.** • Updated **February 09, 2022**

☐



Create Trello cards from Google Forms responses

On 

...

 Owned by **Wellington T.** • Updated **February 09, 2022**

☐



Send online form link to referees

On 

...

 Owned by **Wellington T.** • Updated **February 09, 2022**

☐



send sign up email

On 

...

 Owned by **Wellington T.** • Updated **February 09, 2022**