The Onboarding Welcome Call

Scheduling the Meeting

After a New Prospect has responded and indicated their interest in learning more about CCL, a Welcome Volunteer Onboarder will schedule a meeting and send an email that prepares the New Prospect for the conversation.

Sample email:

> Hello [Name},
>
> Thanks for your interest in meeting with me so I can learn about what brought you to CCL and share more about what CCL volunteers do. Shall we plan to meet on Zoom? I'll send a Zoom link if that works for you.
>
> Before we meet, it would be great if you took a few minutes to login to **CCL Community**, our web resource for volunteers. If you don't know your password, please click the Forgot Password link on the login page and a new one will be sent.
>
> We also invite you to take the optional **Demographic and Political Questionnaire** to help us understand how well we are doing with being fully representative of the country. Please note that it is not anonymous, although the information cannot be viewed by others on CCL Community.

Introductory Meeting Outline

The Welcome Volunteer prepares for a meeting, phone, or Zoom call with the New Prospect. The Welcome Volunteer should lead the conversation with the New Prospect to generally follow this outline:

1. Introductions. The Welcome Volunteer introduces themselves, and then asks the New Member what brought them to CCL. Make connections with your own journey to CCL.
2. Ask if they have watched the Intro Call. If yes, what stood out to them/what questions do they have. *If they have not yet watched it, encourage them to do so!*
3. Share your screen and **cclusa.org** open, our public website. Review:
   a. **About** CCL and our policy priorities - CCL is a non-partisan, grassroots organization with over 400 chapters in the U.S. We work to create the political will for a livable world. Our current policy focuses are building the clean energy economy and nature-based climate solutions. Within those two areas we

currently have two main policy objectives (you can find more about our policy objectives [here](#)):

    i. **Carbon Fee & Dividend** - Carbon Fee and Dividend has been and will continue to be central to our efforts. Carbon pricing is one of the most effective climate policies and one that we believe will be essential in any complete solution to climate.

    ii. **Preserving and Growing Forests** - Forests have the potential to offset emissions and draw down carbon from the atmosphere, as well as help us adapt to a changing climate. Forest policies also have great potential for bipartisan support and can help with moving Congress towards greater action. We expect to engage on forest-related issues at the federal, state, and local levels, including very hands-on projects.

b. [CCL's core values](#) - highlight a couple that particularly resonate with you.

c. The [five levers of political will](#) - after reviewing them, ask if they have a sense of any that appeal to them. (You can show them trainings related to their interests when you review CCL Community.)

4. **Invite them to share their screen and review [CCL Community](#).** Explain that it's our volunteer training and resource website. (This is meant as a high level overview so as not to overwhelm them or take too much time.)

a. Ask them to log in and review/edit their Community Profile. To edit their profile, click on their name in the upper right corner and click "View Profile." This can be a great opportunity to add missing information such as a street address and phone number.

b. Dashboard - highlight Action Tracker, Community Groups, and News Items; visit your chapter's page IF volunteers in your chapter use it to engage with each other--e.g. forums)

c. Resources & Training. Review:

    i. New Volunteer Page - if they haven't done the informational session or Climate Advocate Training, direct them to those under 1) Learn - > Find a Training.

    ii. Training Topics - note that they are largely organized by the five levers. Choose one topic to walk through based on their interests.

    iii. Resources - note that Resources are generally things to print out such as handouts for tabling, or things for reference like reports or slide presentations.

d. Tools: show the Write Congress tool so they are familiar with one of our frequently used Action Tools.

e. Connect: Show Action Teams page and explain these are CCL volunteers from across the country who have organized around shared interests. Perhaps they mentioned an interest that relates to one of these Action Teams. Show the

Forums page so they are aware of the variety of discussions happening among staff and volunteers.

5. Ask if they have any questions.
6. Ask if they would like to opt-in for text messages. They are sent infrequently at key moments when contacting Congress and/or the President are especially useful. Sign up [here](#).
7. Ask if they would like to sign up for the Monthly Call Congress campaign to help us maintain a steady flow of calls to Congress. Sign up [here](#).
8. Provide the dates of the next local chapter meeting, social hour, or other CCL event and encourage them to attend.
9. Always finish the meeting with a summary of things you will follow-up with them about based on their interests, including introductions to other chapter members or action team leads.

Send Post-Introductory Meeting Recap Email

Within 24 hours of the Introductory Meeting, the Welcome Volunteer sends a recap email to the New Prospect. They also introduce the new prospect via email to team leads or key contacts in the chapter based on interests that were discussed during the onboarding meeting.

Report Status of New Prospect's Onboarding In Spreadsheet

The Welcome Volunteer reports it in the spreadsheet when the New Prospect has reached "Onboarding Completed" status. At this point, the now Actively Involved Member is no longer the direct responsibility of the Welcome Team.