

Membership Application Form Checklist

Your membership application form represents the first step in building a relationship with your new member. Since first impressions really do count, it's important that your application form captures the right information, but is also informative and welcoming.



Here is a checklist of questions to ask and tips to consider if you are developing a new membership application or refreshing an existing form. For a more detailed resource, you can read our guide,

“**How to Build a Better Membership Application Form**” by visiting

<http://wildapricot.com/membership-articles/how-to-build-a-better-membership-application-form>

General tips for more appealing membership application forms

Did you...

- ☐ **Roll out the welcome mat?** Consider including a note at the beginning of your form to welcome the new member. For example, “Thank you for your interest in becoming a member of...” or “Welcome to...”
- ☐ **Use a friendly tone and positive questions?**
- ☐ **Specify which questions were mandatory/required and which were optional?**
- ☐ **Who will be responsible for final approval of content?**
- ☐ **Indicate which information would be shared** with other members (for example, in a membership directory), or available just to staff administrators?

Capture the information you need

What information do you need to gather? What about...

- ☐ **Membership type or level**
- ☐ **Membership requirements**
(e.g., specific designations, education, credentials, professional conduct statement)
- ☐ **Membership/subscription term**
- ☐ **Contact information**
(e.g., name, organization, address, telephone, email)

- ☐ **Pertinent personal information required** (e.g., date of birth)
- ☐ **Conditions of membership** (e.g., terms, privileges, responsibilities involved)
- ☐ **Previous membership** (e.g., are they a former member?)
- ☐ **References or sponsors** (if required)
- ☐ **Chapter / Affiliate / Region information** (e.g., if it is a multi-chapter organization and membership is assigned based on particular criteria)

Have you...

- ☐ **Clearly described or defined membership categories?**
- ☐ **Included details on the application process?** (e.g., if the application needs to be reviewed by a committee)
- ☐ **Indicated the types of payment options available?**

Inform and encourage participation from the start

Have you considered...

- ☐ Including a “promise” of what membership in your organization will offer; or an overview of the Membership Benefits and/or a link to membership details?
- ☐ **Asking applicants to indicate personal or professional interests**, or the type of information they want to receive (e.g., government relations, advocacy, legal, professional development)
- ☐ **Listing Committee / Task Forces / Volunteer positions** – and asking if the new member might be interested in getting involved?
(Consider using checkboxes they can fill in.)

Make it easy to complete and visibly pleasing for a great first impression

The visual layout of your application form says a lot about your organization. Here are some thoughts on effective form layout.

Is your form...

- ☐ **User-friendly?** Design elements such as checkboxes can save time – or for online forms, consider drop-down menus and pre-filled answers.

- ☐ **Divided into sections?** By breaking the application form into logical sections, with bold headings or colored blocks of text, you draw the user through the form, and it makes the form seem more manageable.
- ☐ **Easy to read?** Whether it is an online form or one the user prints out to complete, be sure that the type size is large enough to read without a magnifying glass. It's also important to use fonts that are clear and easy to read. Don't mix too many different fonts together, or the design gets messy and hard to follow.
- ☐ **A reflection of your organization?** You want a clean design style, but it should also convey your organization's brand. This may be through your use of specific colors, graphics, or simply your logo and tagline or mission statement.

Want more?

For more ideas on how you can create a user-friendly and efficient membership application, check out “**How to Build a Better Membership Application Form**” by visiting <http://wildapricot.com/membership-articles/how-to-build-a-better-membership-application-form>

Want help creating an online membership application form? If you are a Wild Apricot software user, we offer step-by-step instructions for customizing a Wild Apricot membership application form. Just search “Membership Application Form” at <http://help.wildapricot.com>

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144 Front Street West, Suite 725
Toronto, ON M5J 2L7 Canada
T 1-877-493-6090 F 905-248-3878