GrowthZone Training
Minneapolis April 2018

Introductions

- Your Name and Role
- Name of your Association/Chamber
- Scale of 1 – 10 what you know about GrowthZone
- If you could have any business… what would it be

Agenda

- System Navigation Initial GrowthZone setup
- Setting up Staff/Members User Permissions & Profiles
- Setting up Communications
- Initial Billing Setup
- Working with Contacts
- Setting up Membership Types & Membership Application Form
- Managing Members
- Working with Web Content Introduction to Info Hub
- Analyzing Membership Reports

Overview

GrowthZone is the smart association software designed to help you:

❖ Grow your membership

❖ Retain and engage your existing organizations or individuals

❖ Do more with less time

Overview

Easy to use, and designed to manage all the day-to-day operations of your organization

Three Different Views

- Staff/Database View

- Member View

- Public View

Overview – Staff View - Database

- Where you will be able to manage all of your contacts and members, manage your events, generate and analyze reports, and work with the modules that you have selected
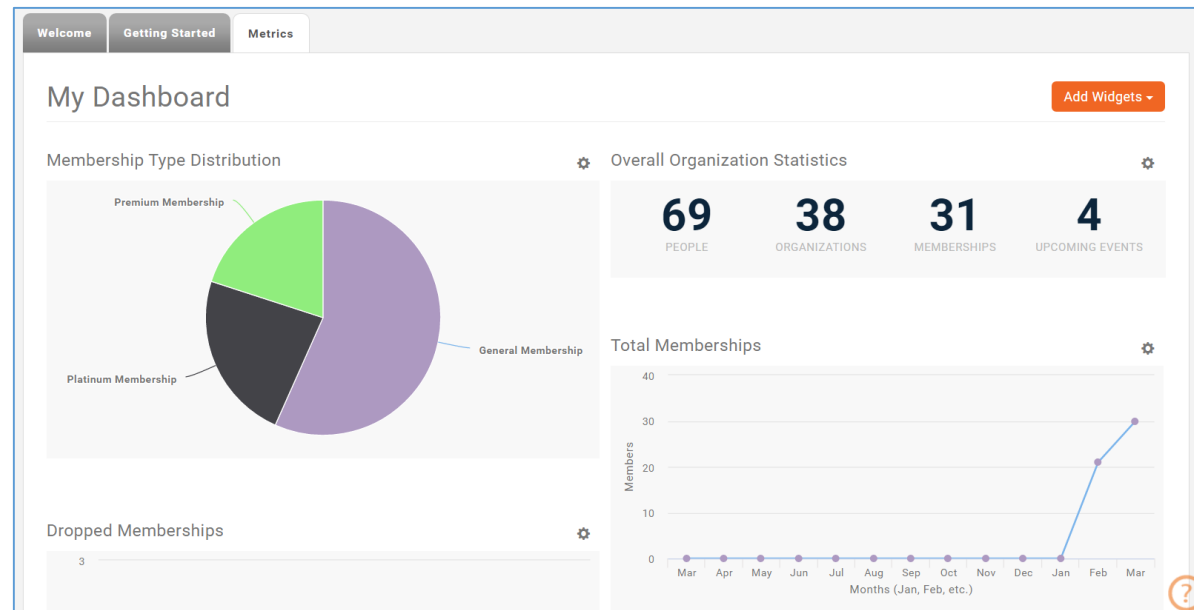
Overview – Member View - InfoHub

- Members can
  - Update own information (photos, directory listing, website, etc.)
  - Manage their account and pay their bills
  - Register for Events, enter New Events
  - Enter Hot Deals, Member to Member Deals, & Job Postings…
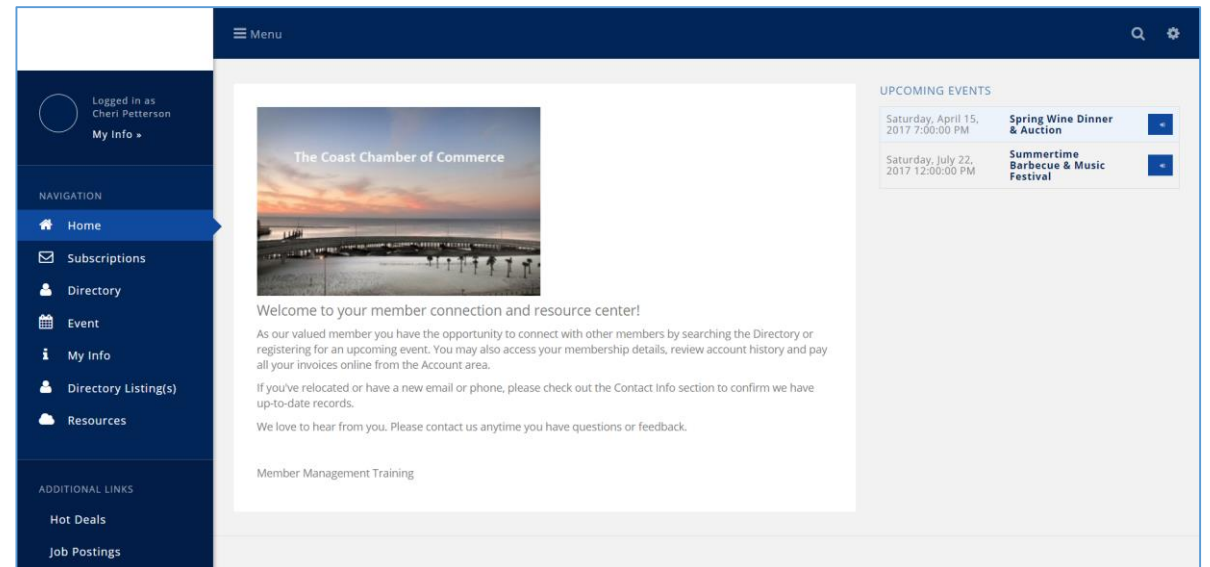
Overview – Website – Public View
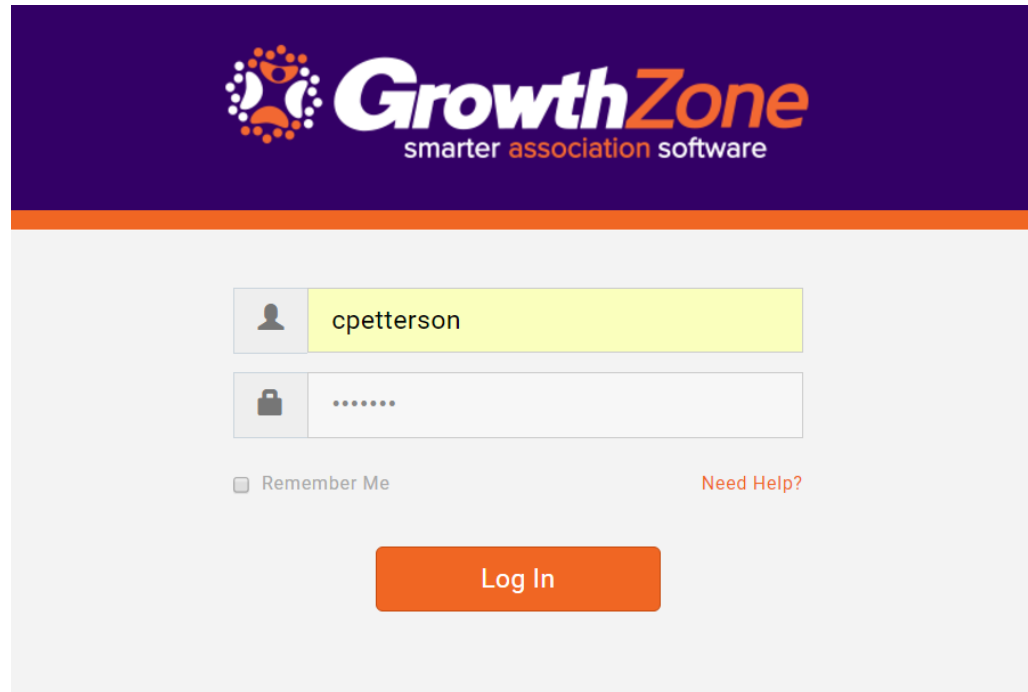
- We can design a website for you, or assist you in integrating to your existing site
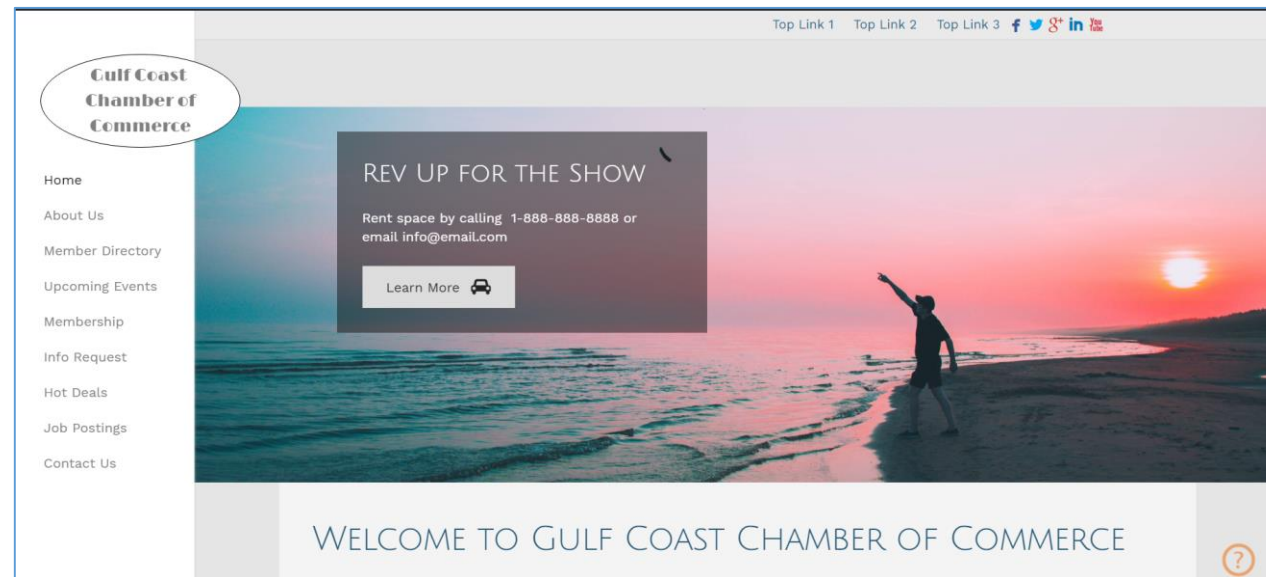
Staff View - Database

- Logging In: https://growthzoneapp.com/login

Staff View – Database Navigation

- Header

- Navigation Panel

- WorkSpace

- Common Functions
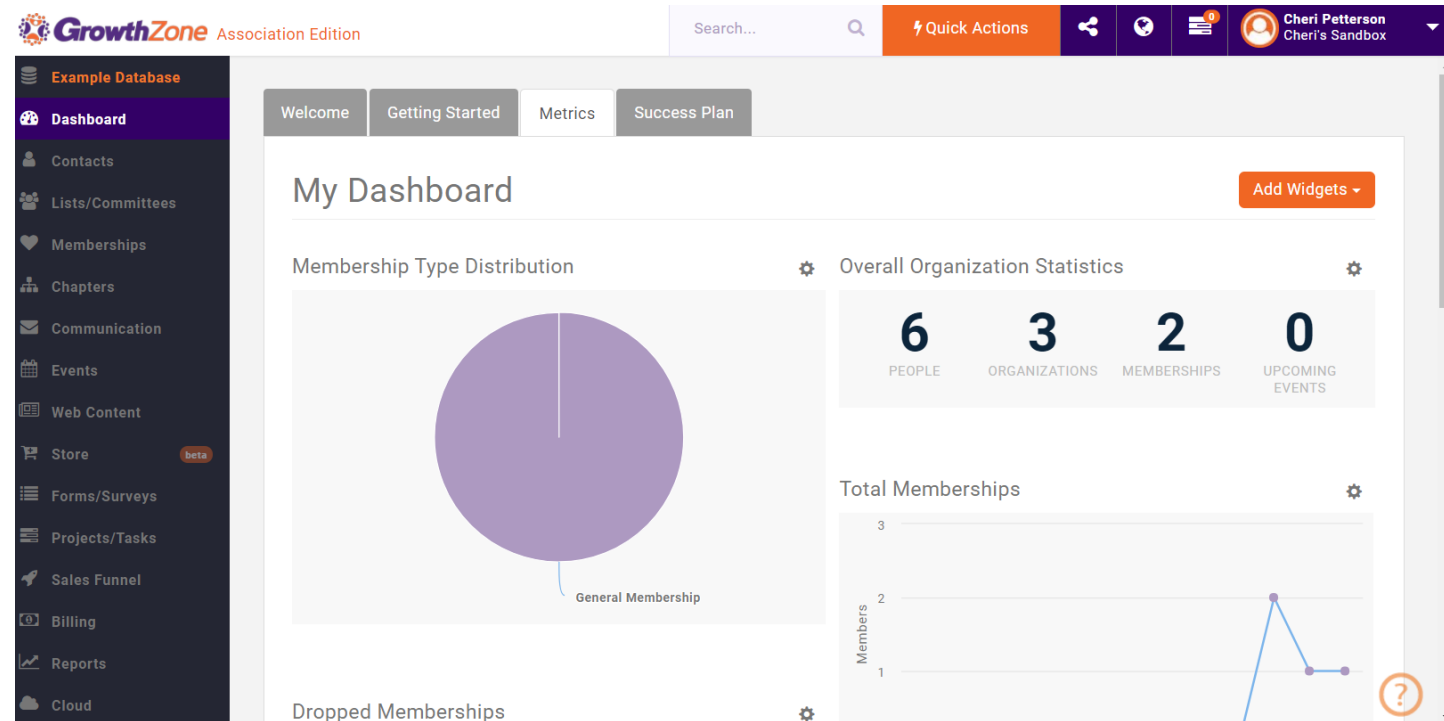
Software Navigation - Header

Search

- The Search option allows you to easily search for Contacts, Members or Events

Software Navigation – Quick Actions

- Add Contacts…
- Add Notes…
- Send Emails…
- Add Projects…
- Add Sales Opportunity…
- Add Events…
- Add Reminders…
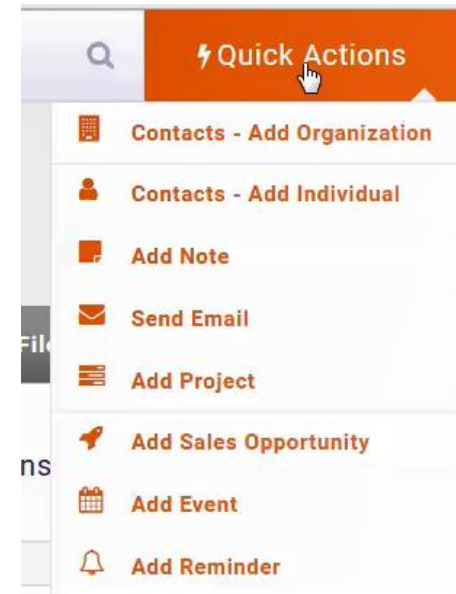
Software Navigation – Quick Actions

Example

   ### Add Contacts - Organization
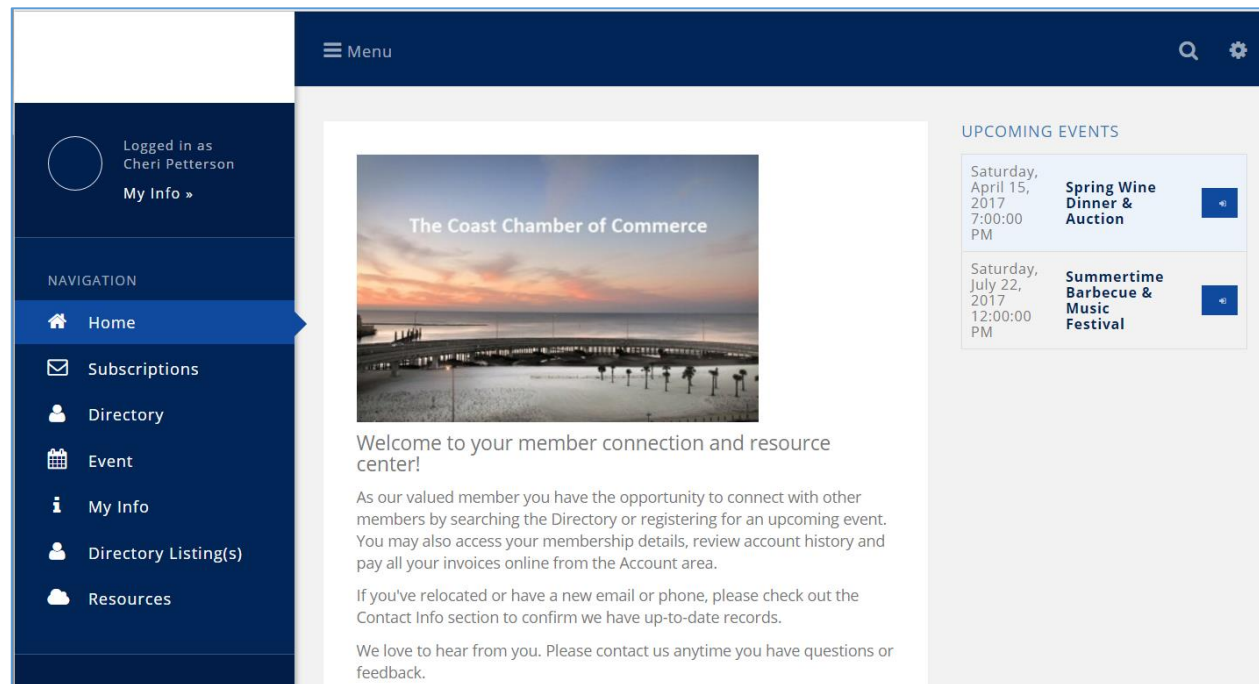
Software Navigation – Access to InfoHub
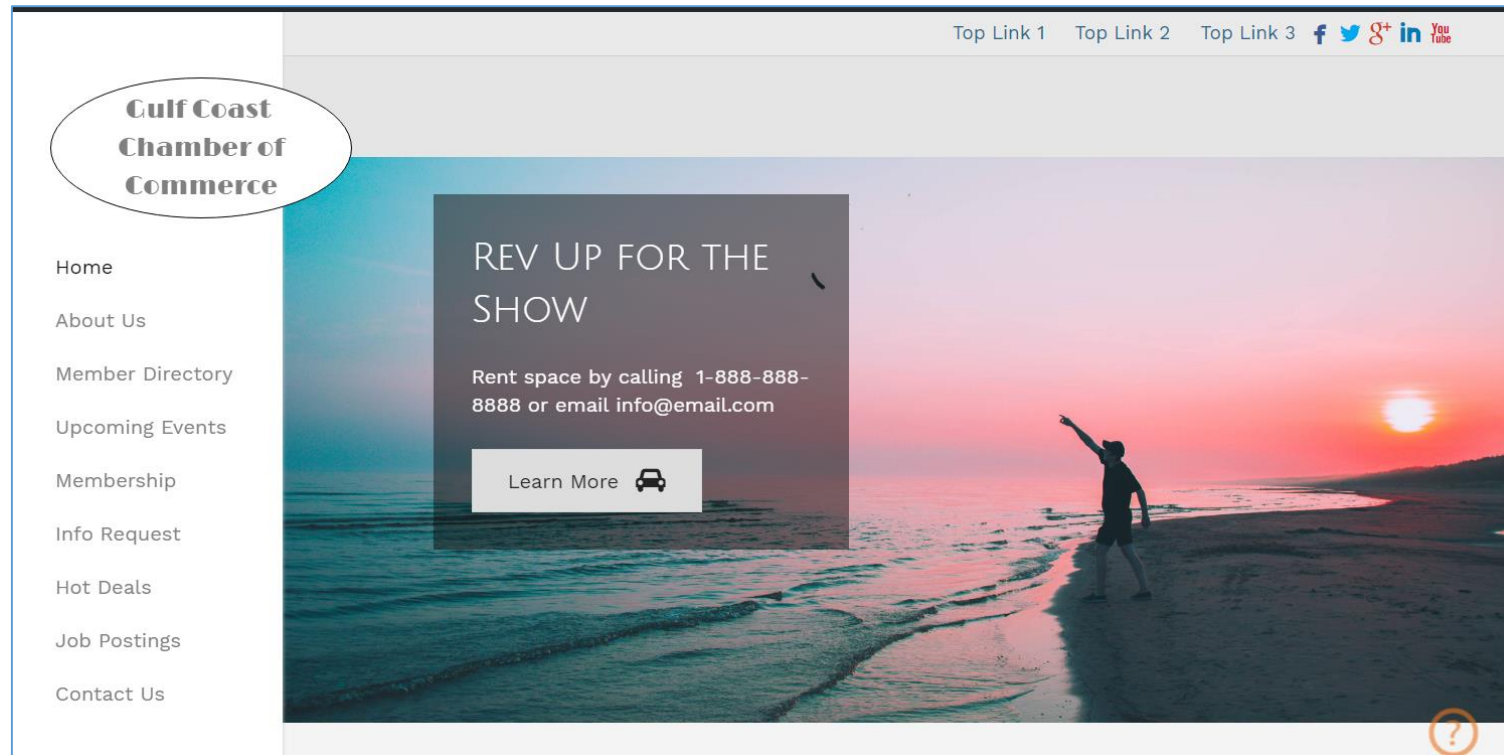
- The logged on user can access the Info Hub by clicking

Software Navigation – Access to your Web-site

- You can a view your website by clicking

Software Navigation – Assigned Tasks

- Go to your list of Assigned tasks

Project Name	Event Name	Name	Task Priority	Task Type	Contact	Assigned To Person	Due Date	Completed Date	Percent Complete
		Follow-up Reminder for Cheri Petterson	Normal		Adrian Chavez	Cheri Petterson	3/16/2017		0
		Follow-up Reminder for Cheri Petterson	Normal	Member Acquisition	Adrian Chavez	Cheri Petterson	3/17/2017		0
		Follow up with Claude Monet	Normal		Monet's Landscaping	Cheri Petterson	3/20/2017	3/16/2017	100

Software Navigation – Additional Options

Additional options for the logged in staff member

- Chat
- Help
- Submit or Vote on Ideas
- Change Password
- User Settings
- My Notifications
- Logged In Users
- Software Releases
- Get Compliment
- Switch Account
- Logout
- System Status
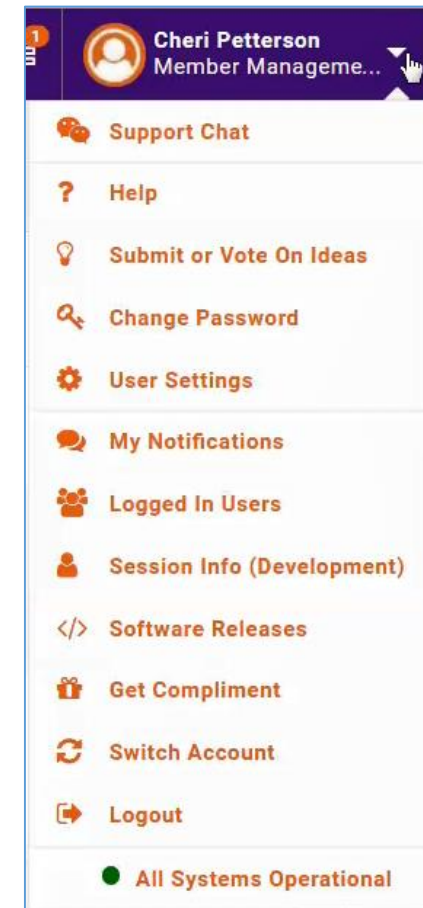
Navigation Panel

- The Navigation Panel allows you to easily navigate to the module you want to work with
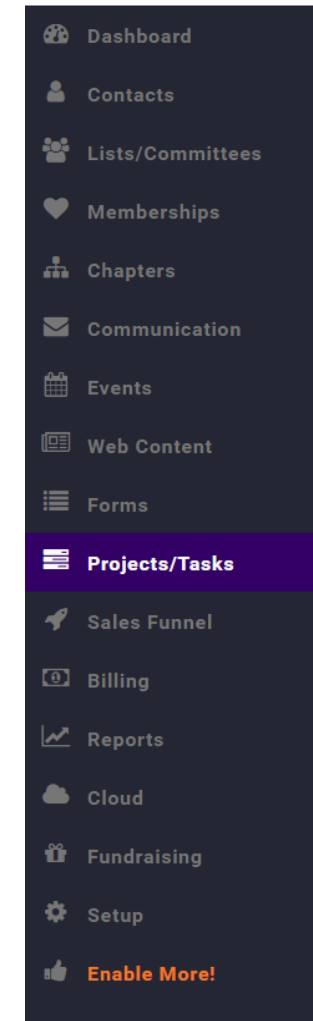
Work Space

- When a module is selected in the Navigation Panel – details will be displayed in the work space

Common Functions

- Search Function – search functions are available throughout the software
  - Type ahead search
  - Show Only
  - Customize Results

Common Functions

- Add
  - the module that you are using will dictate the options available
  - The most commonly used option will be displayed on the Add button

Contact
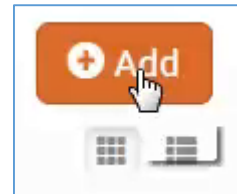
Membership
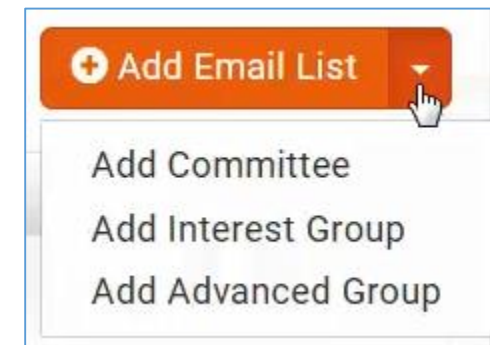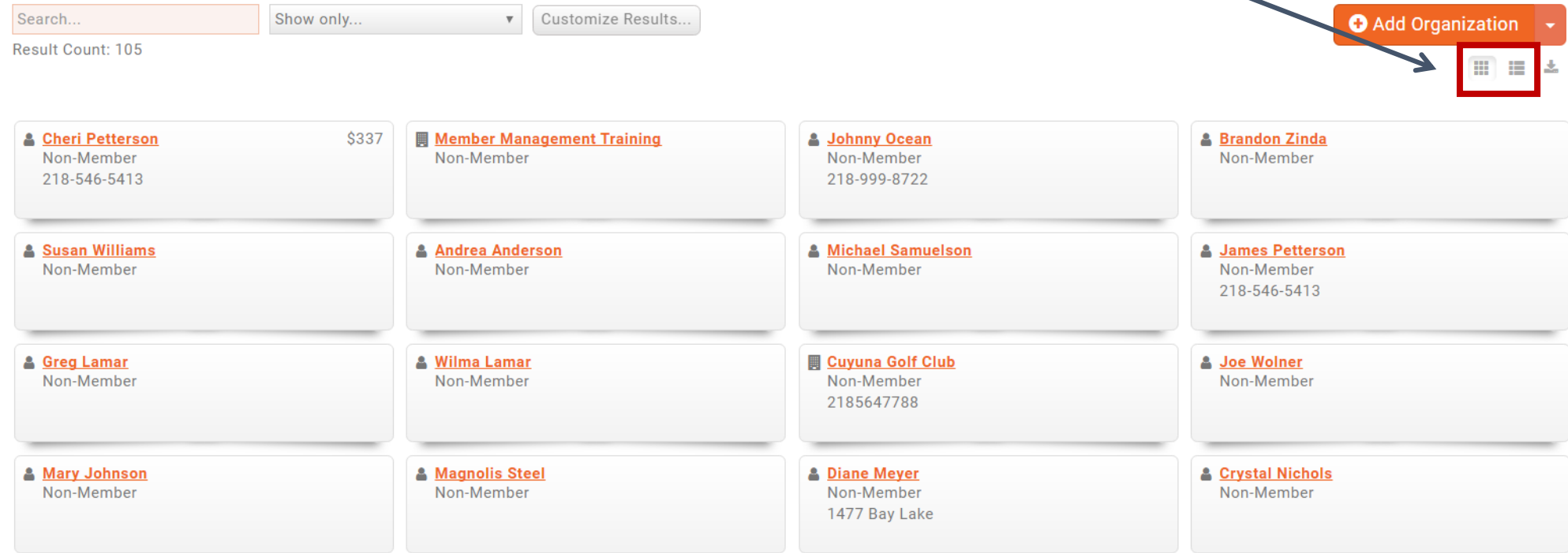
List/Committee

Common Functions

- Changing displays from Tile to List and vice versa

Common Functions

- Exporting List

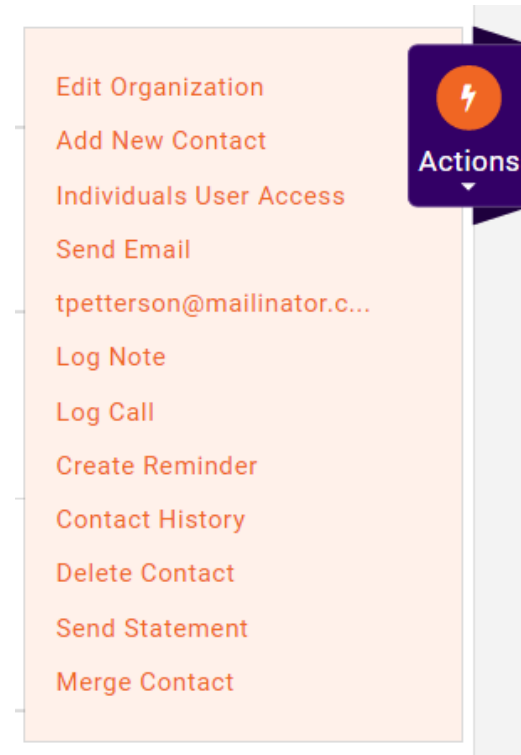# Common Functions

- Edit
- Add
- Email
- Login to InfoHub (as user)
- Calendar
- Communication Status

Note – some of the action buttons discussed above may be hidden until you dwell over them

Common Functions

- Clicking the Actions icon on a page will display a list of the command tasks performed in the module

- Tasks will vary per module

Edit Organization
Add New Contact
Individuals User Access
Send Email
tpetterson@mailinator.c...
Log Note
Log Call
Create Reminder
Contact History
Delete Contact
Send Statement
Merge Contact

Actions

Common Functions

- Help

  - Still under development, clicking this icon will provide help information and simulations
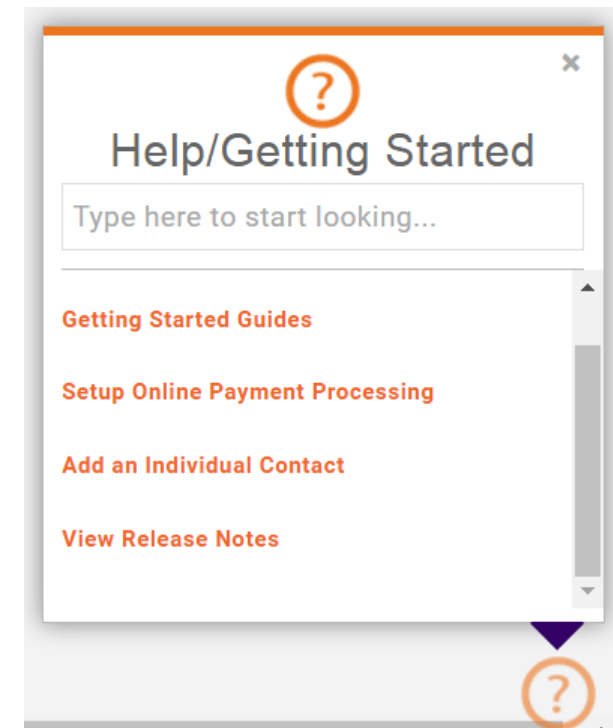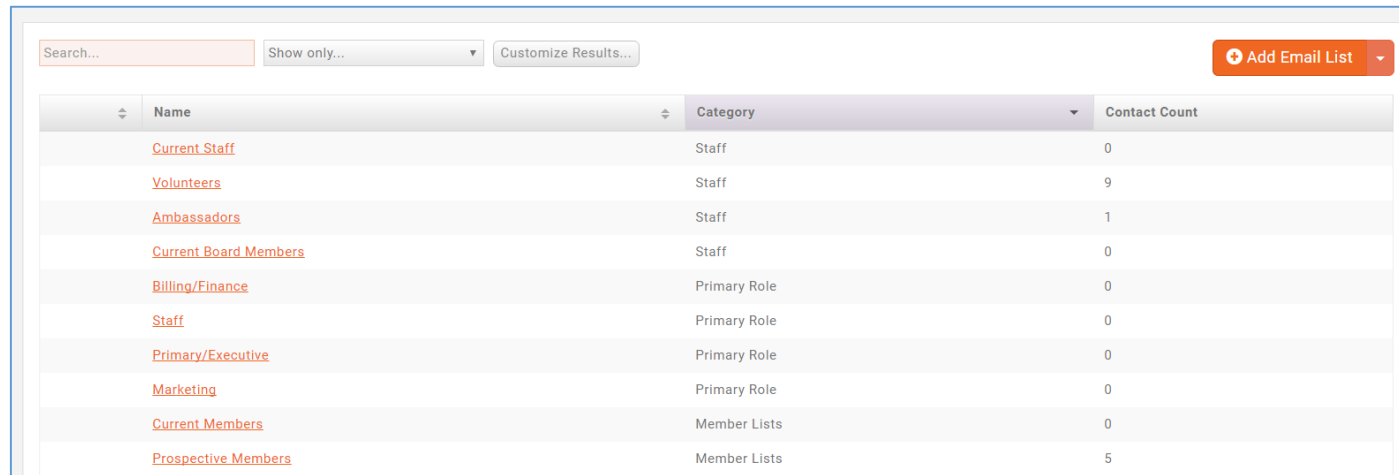
GrowthZone Modules

The GrowthZone Membership Management System is powerful, easy to use and designed to manage all the day-to-day operations of your organization.

Grow Faster – Acquire New Members

- Lists/Committees
- Communications
- Contact Management
- Membership Management
- Sales Funnel*

Lists/Committees

- The Lists/Committees module makes it easy to connect with and organize your members and individuals into groups for different types of communication

Communications

- Templates
- Categorization
- Automated Messaging/Notifications
- Individual/Group Emails
- E-mail Receipt Tracking

Contact Management

- Contact Management allows you to easily track your new contacts you have made face to face, over the phone, via the web

Membership Management

- Easily manage members activity, billing, and contact info in one central database

Membership Management

- Membership Application Form
  - Integrated to web-site
  - If configured automatic notification to staff when an application is received
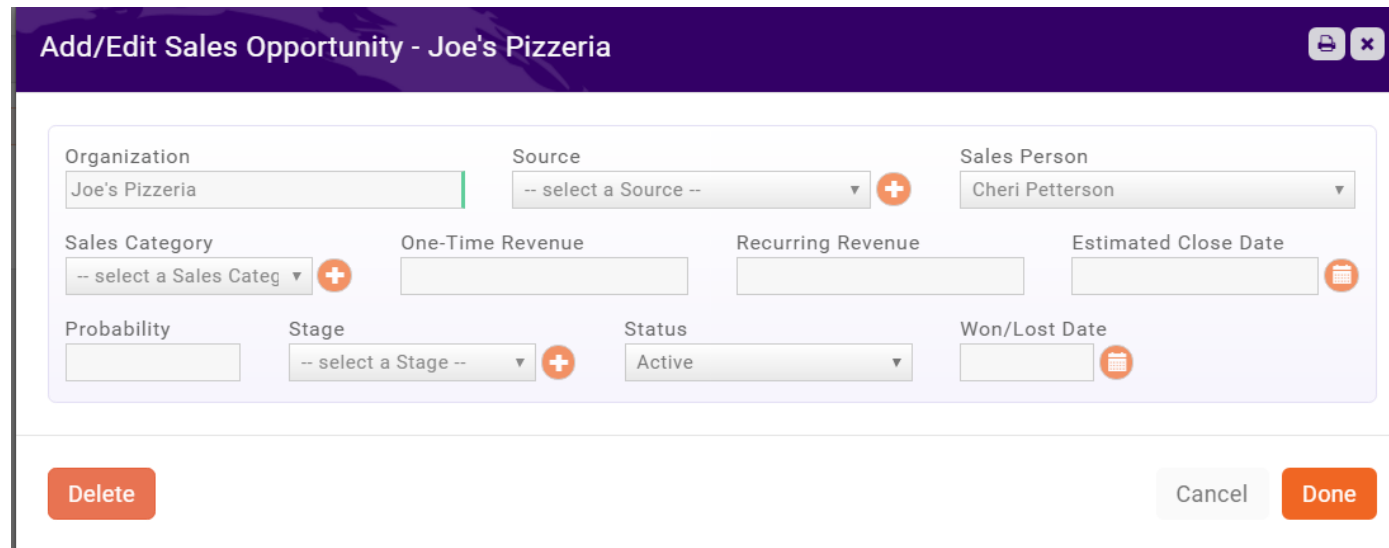
Sales Funnel*

- Provides a clear view of the opportunities currently available, showing you the revenue that your organization can make in the months ahead

Sales Funnel*

- Allows for tracking:
  - One time revenue
  - Recurring revenue
  - Probability of Sale
  - Timeline
  - Communications
  - Tasks

Retain & Engage Your Members

- Events Management
- Info Hub
- Events Expo*
- Web Content*
- Fundraising*
- On-line Store*
- Certification*

Events Management

- The Events module is designed to help you navigate every aspect of the event process - everything from inviting attendees to tracking registrations to creating invoices
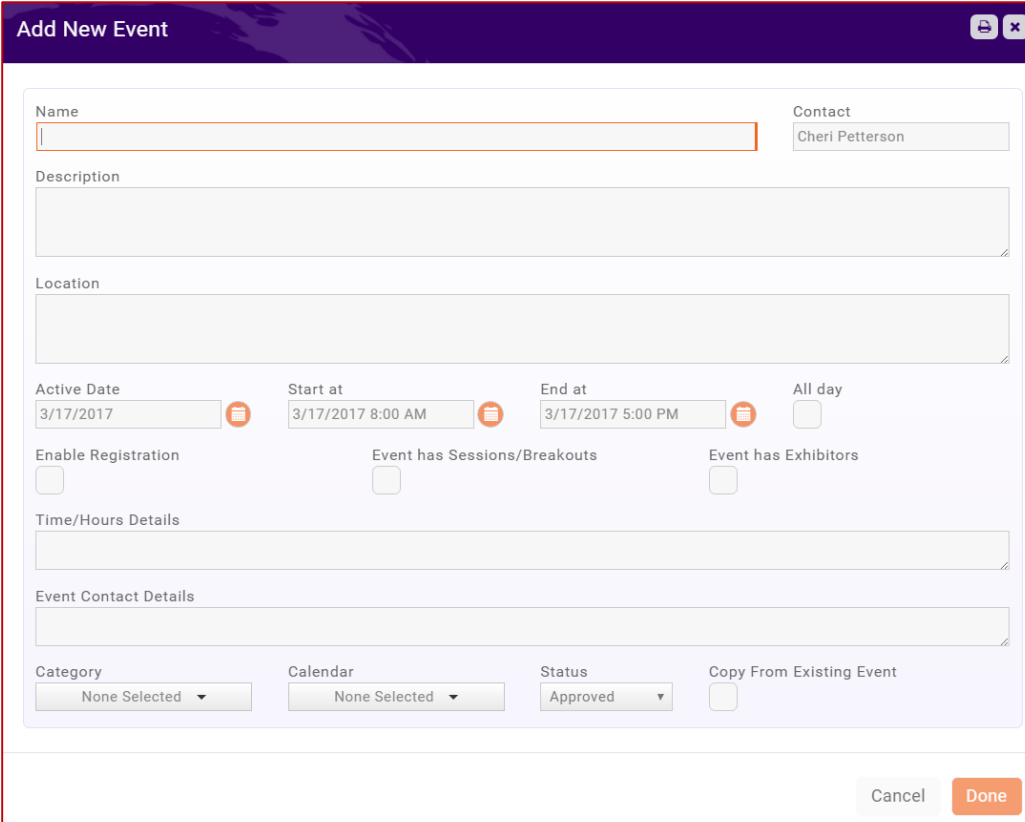
Events Management

- Add Events
- Manage Registration
- Manage Sessions/Break-outs
- Manage Exhibitors (Coming Soon)
- Manage Sponsors
- Manage Fees
- Manage Attendance
- Manage Communications

Events Management - Reporting

- Activity Report

- Attendee Report

- Discount Report

- Sessions Report

- Sponsorship Report

Info Hub

- Members can update your own information (photos, directory listing, website, etc.)

- Manage their account and pay their bills

- Register for Events, enter New Events

- Enter Hot Deals, Member to Member Deals, & Job Postings...

Web Content*

- Provide additional benefits to members using hot deals, job postings and member to member hot deals

Fundraising*

- Help the community with fundraising campaigns and track donations

Overview

- The Store Module is a module that allows the association to sell additional resources/products to members

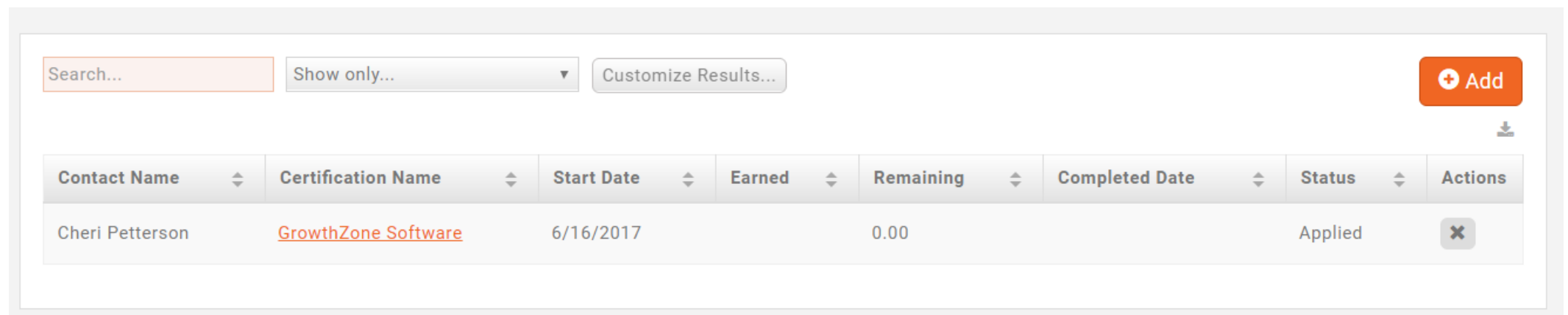- The integrated into your GrowthZone Software, makes selling and processing orders as simple as possible

Certification

The Certification module allows you to track certifications for your members

- Track hours
- Track Requirements
- Provide Certificates

Contact Name	Certification Name	Start Date	Earned	Remaining	Completed Date	Status	Actions
Cheri Petterson	GrowthZone Software	6/16/2017		0.00		Applied	✖

Do More with Less Time

- Billing
- Reporting
- Forms*
- Project Management*

Billing

- Easy creating of invoices

- Accepting Payments

- Integrated Payment Processing

Reporting

- Wide variety of reports for you to analyze all aspects of your organization
- Customizable to meet your needs

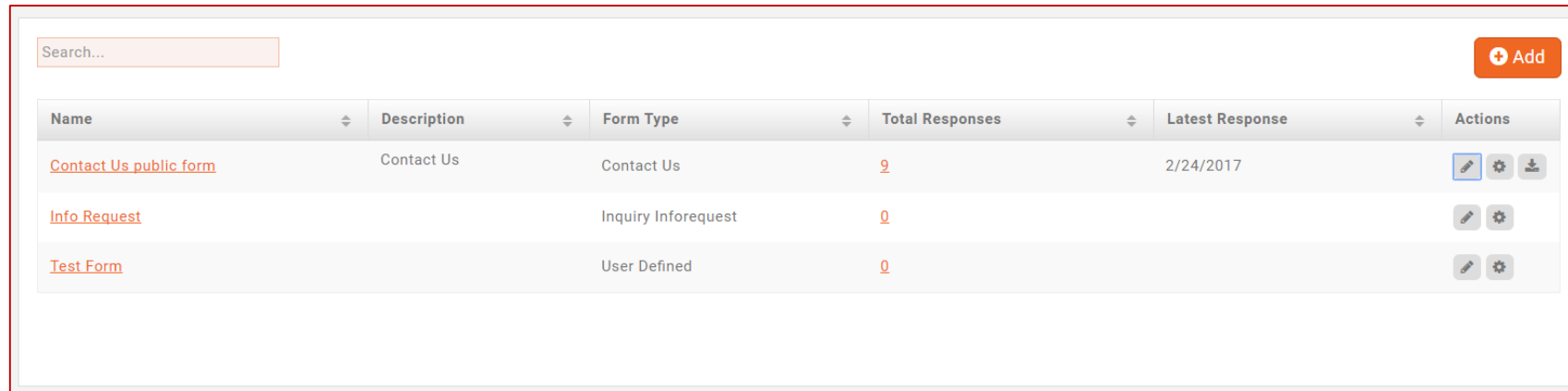# Form Builder*

- Use the Form Builder/Survey tool to create online forms or insert links into emails to encourage and track responses

Project Management*

- Streamline processes for membership acquisition, membership on-boarding, event planning…

Questions??

For additional training, contact training@growthzone.com