GrowthZone – Working with Projects/Tasks

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Agenda

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- ❑ Overview
- ❑ Creating a Project
- ❑ Monitoring Projects
- ❑ Project Management Reports

Overview

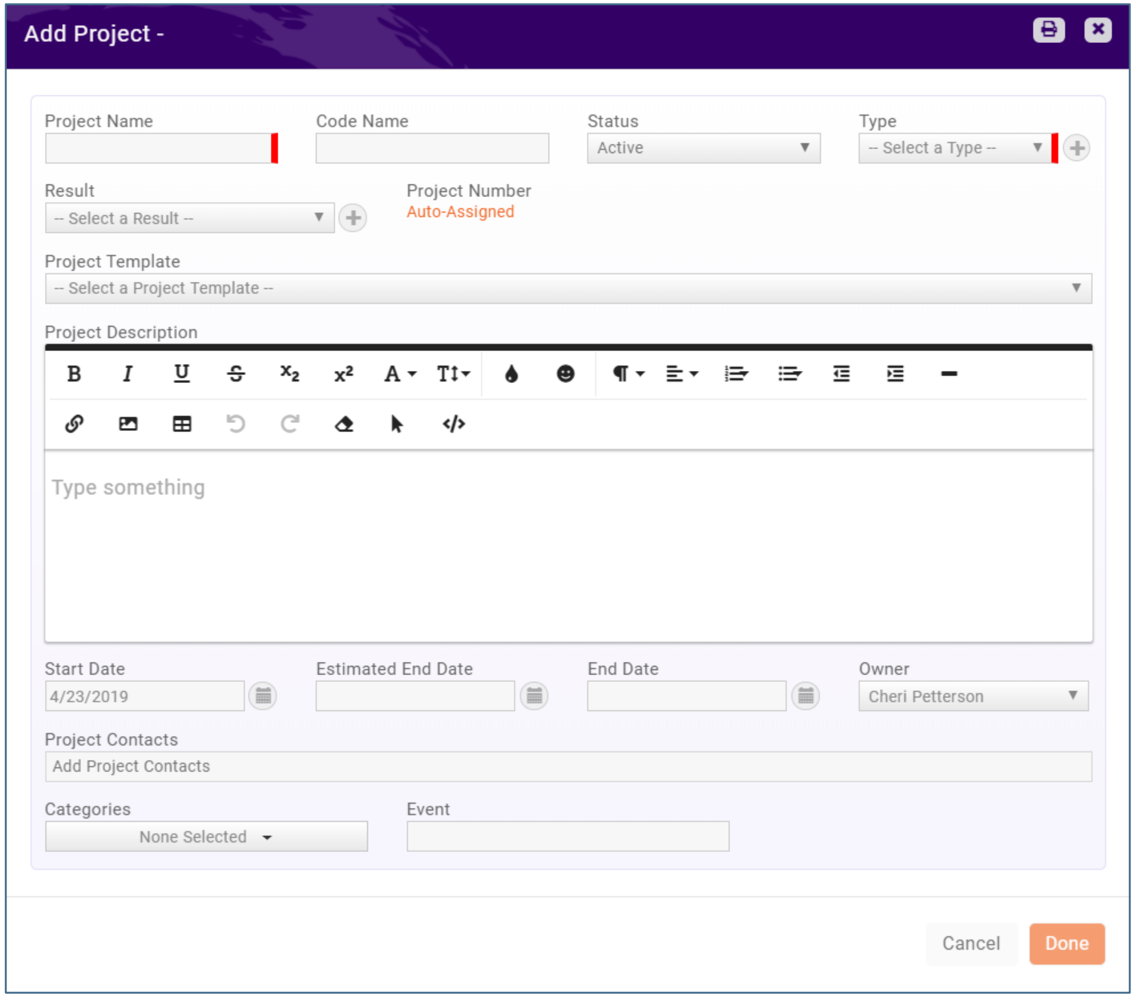
The GrowthZone Project Management module will help you to organize and manage projects from beginning to end

The module can be used to manage your member acquisition, member on-boarding, events, and more. If you have projects that are repeatable (such as member on-boarding) you can create a project template to be re-used, saving you time

Create a New Project

When creating a project, you may either create a project from scratch, or you may use a template.

WIKI: Create a New Project



Monitoring & Updating Projects

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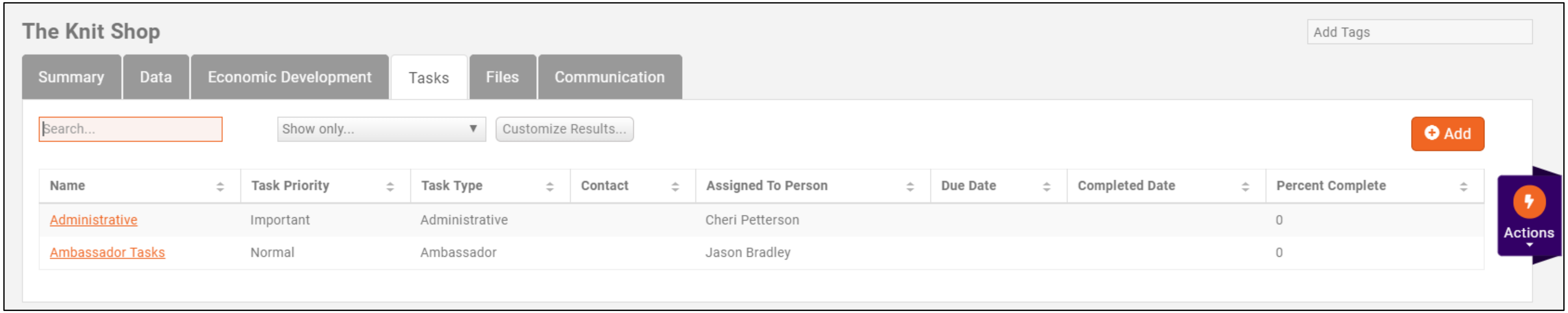
Project Monitoring refers to the process of keeping track of all project-related metrics including team performance and task duration, identifying potential problems and taking corrective actions necessary to ensure that the project is within scope and meets the specified deadlines

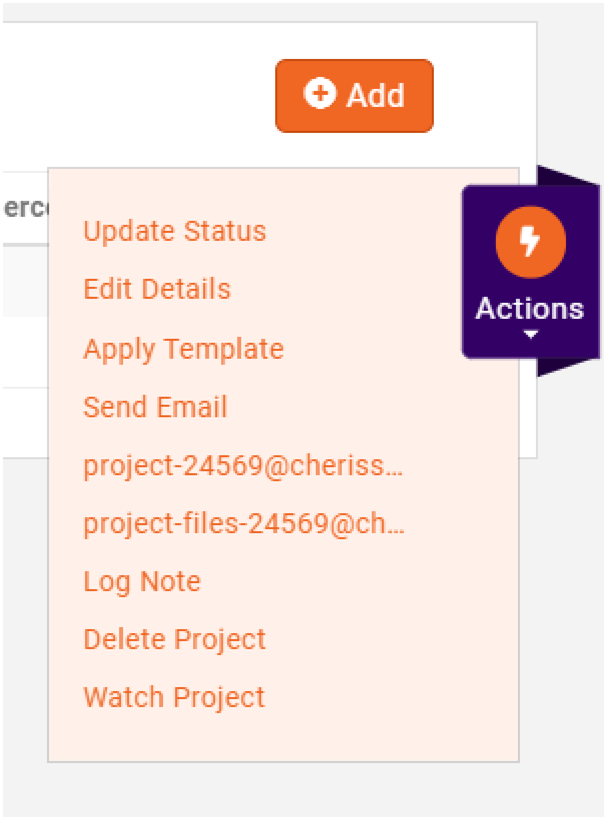
WIKI: [Monitoring & Updating Projects]



Monitoring & Updating Projects

Watch your projects…Staff may watch a project, and be sent notifications when:

- ❑ A project they are watching is completed
- ❑ When a task is completed for a project they are watching



Monitoring & Updating Projects

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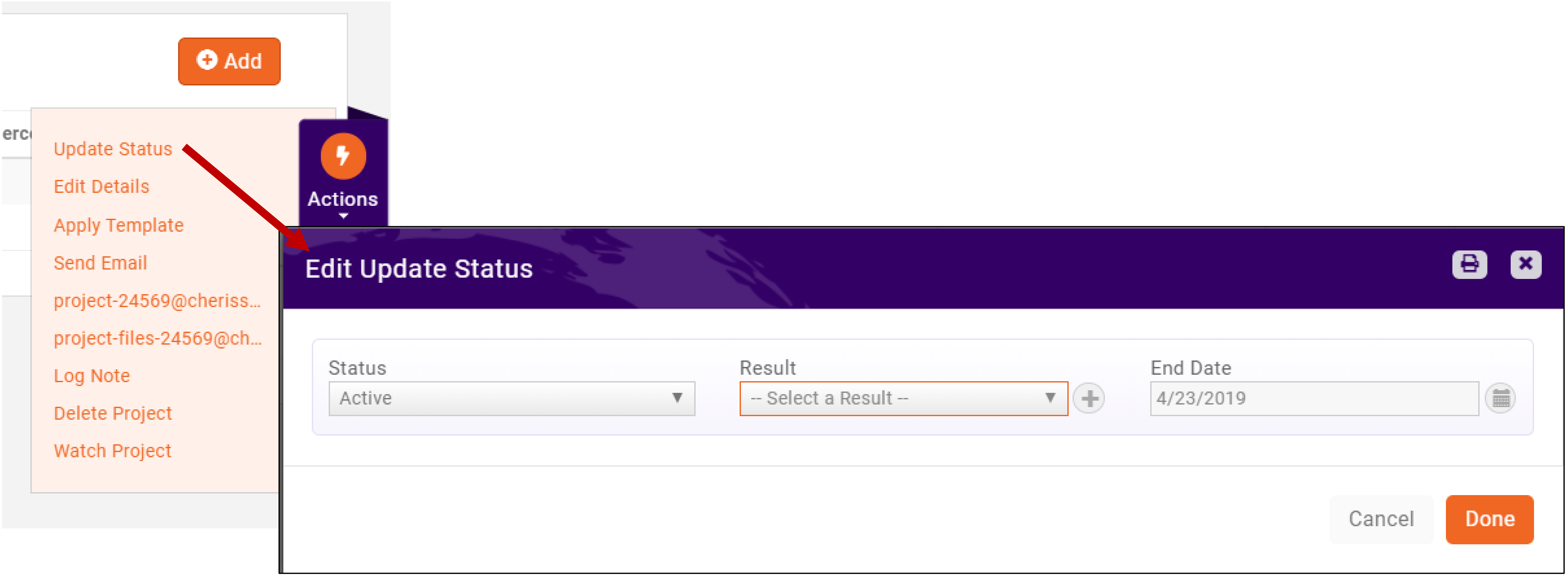
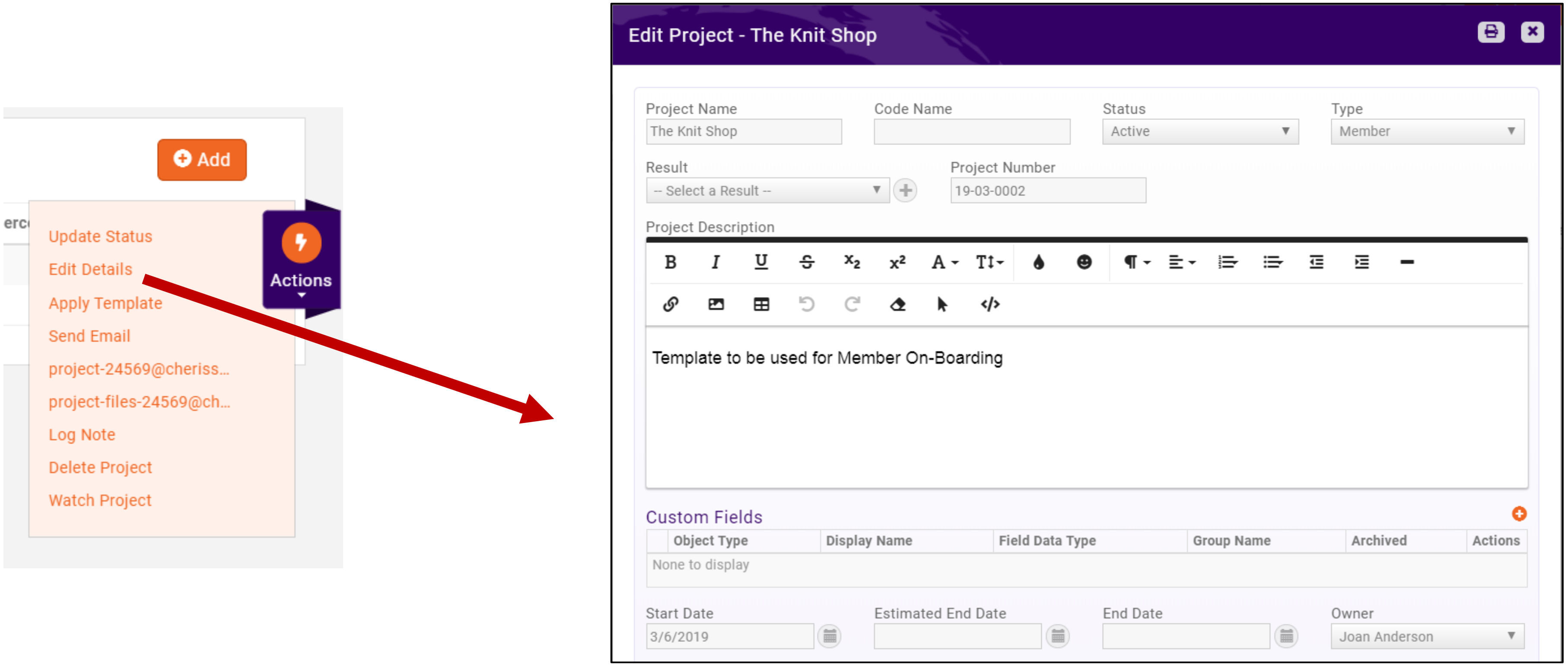
WIKI: Update the Status of a Project



Monitoring & Updating Projects

When change is necessary, you can edit project details, such as the description, type, contacts, etc.

WIKI: Edit Project Details



Monitoring & Updating Projects

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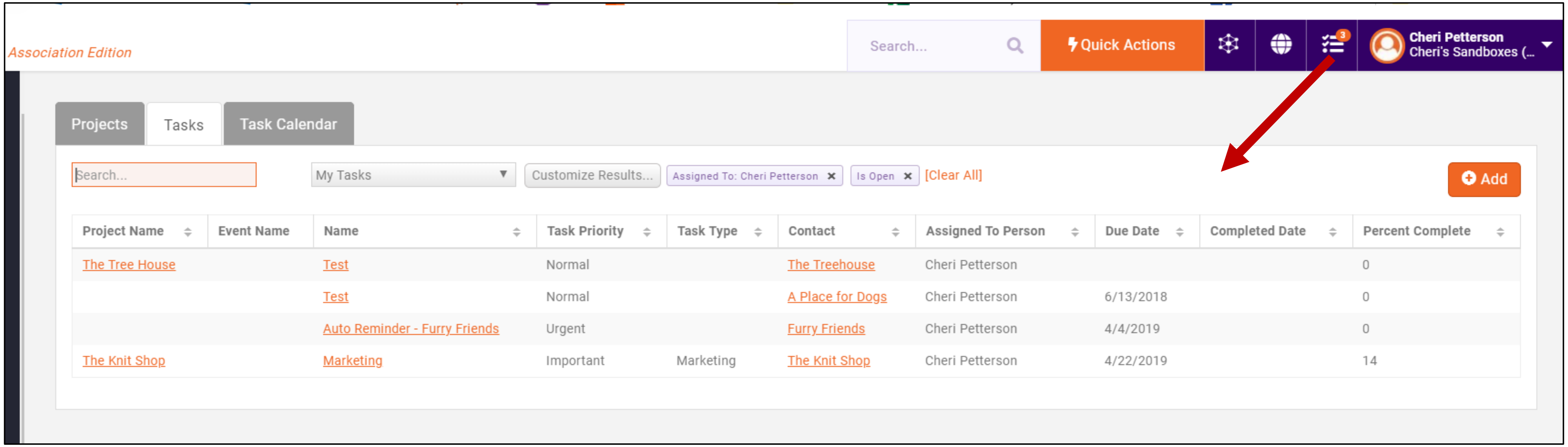
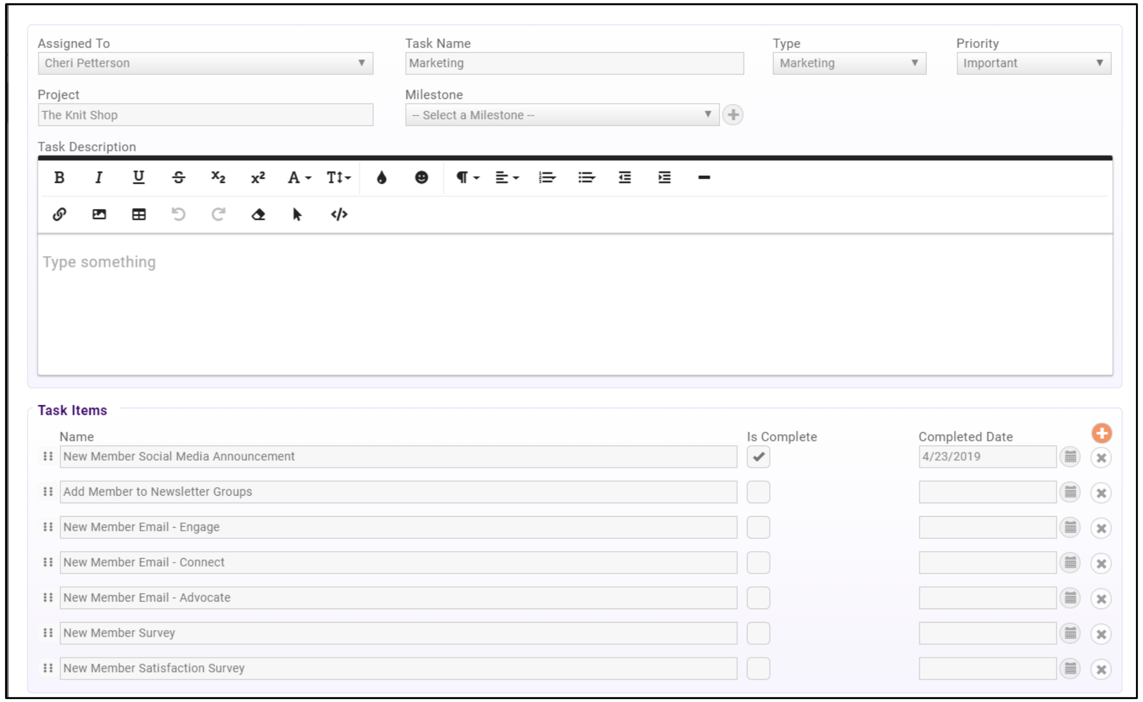
The **Task List** icon in the header bar will notify to a staff member that they have tasks that need attention



Monitoring/Updating Individual Tasks

Once tasks have been assigned, the staff person to whom the task has been assigned will be sent an email notification and will be able to view and update task status

WIKI: [Monitoring & Updating Individual Tasks]()

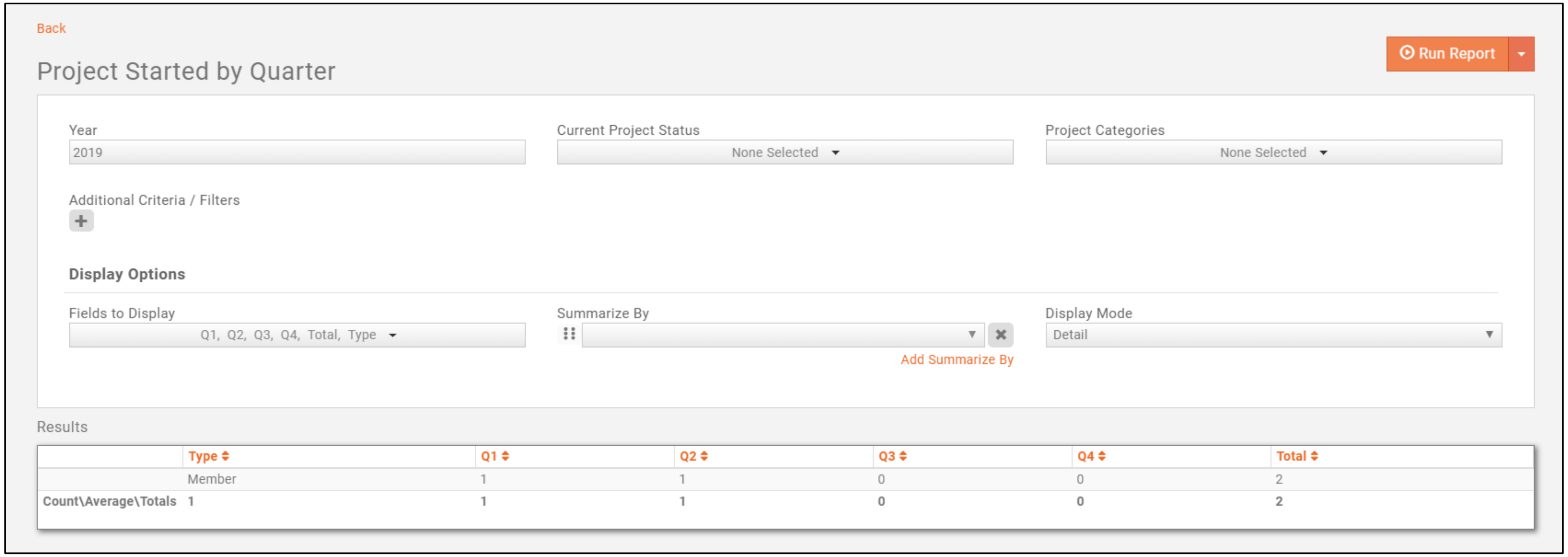


Project Reporting

Project Started by Quarter

The Project Started by Quarter report allows you to generate a list of all projects started in each quarter of a selected year

WIKI: [Project Started by Quarter]



Project Summary Report

The Project Summary Report allows you to generate a list of some or all projects along with the name of the project owner

WIKI: Project Summary Report

Results

Project Name	Project Owner	Type	Category	Total Projects
Chewy Chewy Onboarding	Julie Jones	Member		1
The Knit Shop	Joan Anderson	Member		1
The Tree House	Cheri Petterson			1
Count\Average\Totals	**3**			**3**

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Projects Report

The Projects Report can be used to analyze the status of your current project, for example, project that are past completion date

WIKI: Projects Report

Results

Project Name	Project Type	Number	Project Category	Status	Contact Name	Default Email	Default Phone
Chewy Chewy Onboarding	Member	19-04-0003		Active			
The Knit Shop	Member	19-03-0002		Active	The Knit Shop		
The Tree House		18-08-0001		Active	The Treehouse		
Count	**3**						

Project Reporting

Task Report

The **Task Report** allows you to generate a list of all tasks. This report may be useful to identify open tasks, tasks assigned to specific staff members, incomplete tasks, and so on.

WIKI: Task Report

Results

Project Name	Project Type	Task Name	Task Description	Priority	Task Start Date	Due Date	Completed Date	Estimated Hours	Percent Complete	Assigned To
Chewy Chewy Onboarding	Member	Adminstrative DB Updates	Getting all needed information updated in the database	Important				2	0	Maggie Jones
Chewy Chewy Onboarding	Member	Ambassador Tasks		Important	4/26/2019	5/22/2019		10	0	Missy Frame
The Knit Shop	Member	Marketing		Important	4/1/2019	4/22/2019		0	14	Cheri Petterson
The Knit Shop	Member	Administrative		Important		4/2/2019	4/23/2019	0	100	Cheri Petterson
The Knit Shop	Member	Ambassador Tasks		Normal		4/12/2019		0	33	Danna Dewey
Count	5									

Questions?

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