

GrowthZone - Working with the Member Recruitment Module



Overview of Member Recruitment Module

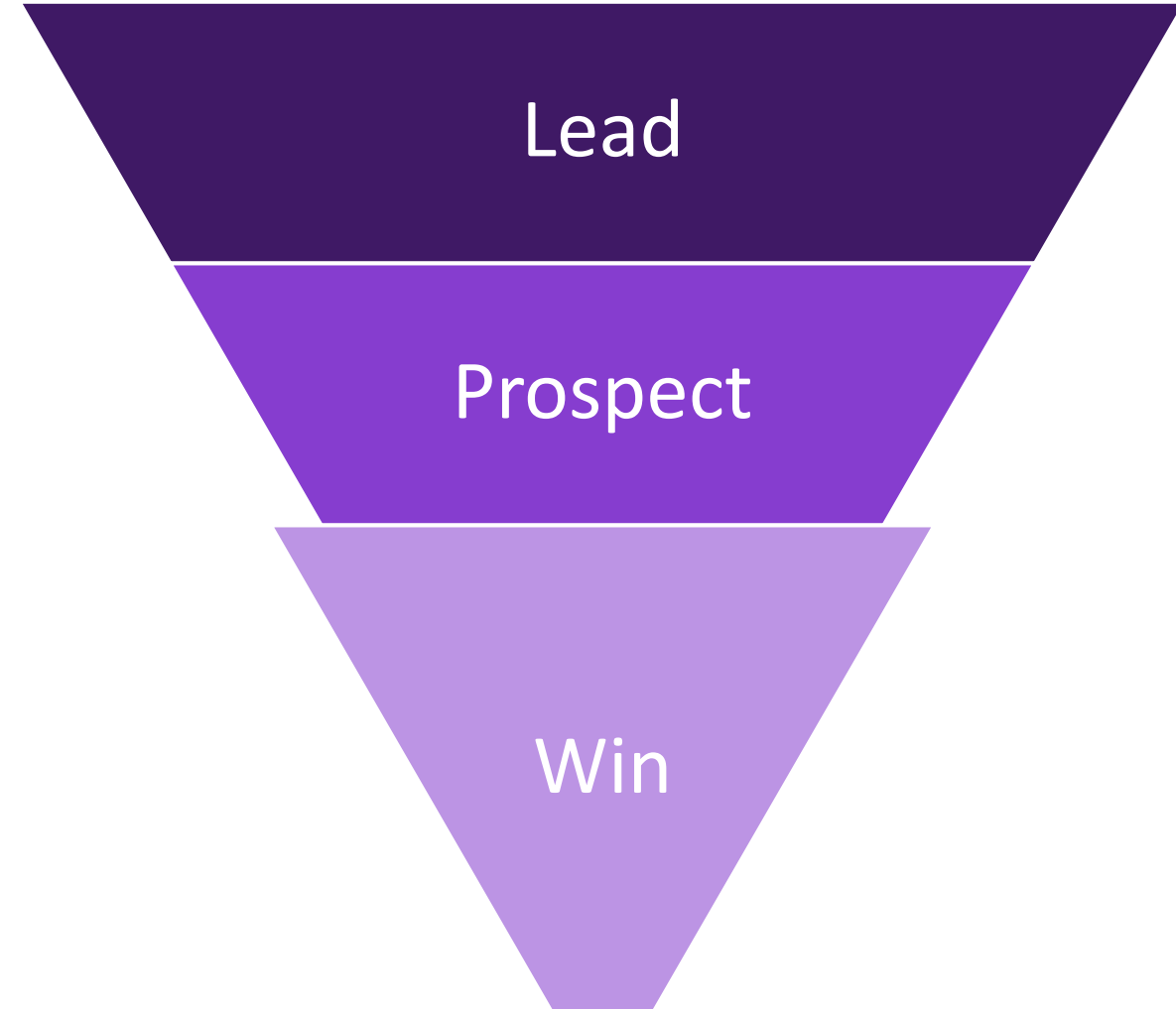
Create Sales Opportunity

Generate Proposal & Signup Link

Understanding Timeline Items

Generate Member Recruitment Reports


Member Recruitment is a module that allows you to track the progress of various sales opportunities from Lead to Win.



Opportunities may include:

- New Memberships
- Membership Upgrades
- Volunteers or Prospective Board Members
- Exhibitors for an Event

Overview






Cooking with Susie

[Active] [Account Number]

< 10 of 12 >

- Profile
- Info**
- Proposals
- Timeline
- Communication
- Tasks **0**
- Files
- Activity

Save 

Sales Person	Category	Sales Status	Sales Stage	
<input type="text" value="Matt Anakkala"/>	<input type="text" value="New Membership"/>	<input type="text" value="Won"/>	<input type="text" value="Closed - Won"/>	
One-Time Revenue	Recurring Revenue	Estimated Close Date	Probability	Created Date
<input type="text" value="25"/>	<input type="text" value="1200"/>	<input type="text" value="4/28/2017"/> 	<input type="text" value="100"/>	<input type="text" value="4/28/2017"/>
Status Reason	Sales Source	Won/Lost Date		
<input type="text" value="Won"/>	<input type="text" value="Email Campaign"/>	<input type="text" value="4/28/2017"/> 		

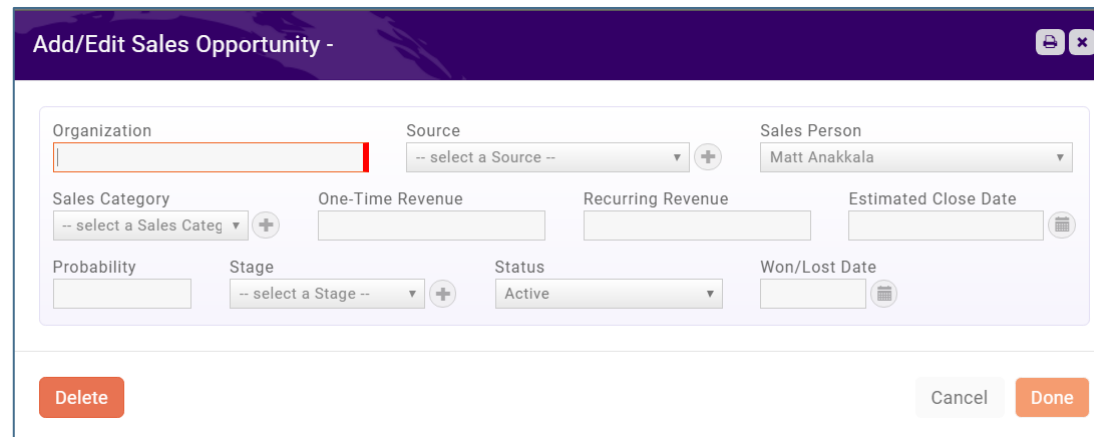
Manage Custom Field

Annual Revenue

Creating a Sales Opportunity

A Sales Opportunity may be created for any existing contact in your database (if the contact does not exist – create first)

WIKI: [Create a Sales Opportunity](#)



The screenshot shows a web form titled "Add/Edit Sales Opportunity" with a dark purple header. The form contains several input fields and dropdown menus:

- Organization:** A text input field with a red border.
- Source:** A dropdown menu with the text "-- select a Source --" and a plus icon.
- Sales Person:** A dropdown menu with the name "Matt Anakkala" selected.
- Sales Category:** A dropdown menu with the text "-- select a Sales Categ" and a plus icon.
- One-Time Revenue:** A text input field.
- Recurring Revenue:** A text input field.
- Estimated Close Date:** A date input field with a calendar icon.
- Probability:** A text input field.
- Stage:** A dropdown menu with the text "-- select a Stage --" and a plus icon.
- Status:** A dropdown menu with "Active" selected.
- Won/Lost Date:** A date input field with a calendar icon.

At the bottom of the form, there are three buttons: "Delete" (orange), "Cancel" (grey), and "Done" (orange).

Create Proposal

Two Step Process

- Setup the Proposal
- Add Fee Items to the Proposal






























WIKI: [Create a Sales Proposal](#)

Add/Edit Sales Proposal

Name Valid Until Sales Proposal Template Terms/Conditions

Message Template

Message On Sign Up Page

B I U  x_2 x^2 A  T                           

Type something

Is Accepted

Proposal Url

Delete Cancel Done

Create Proposal

Add Fee Items

Add/Edit Sales Proposal Items

Membership Type
General Membership

One-Time Fees

Item	Description	Quantity	Price	Disc	Total
Setup	Setup	1	25	\$0.00	\$25.00

Recurring Fees

Item	Description	Quantity	Price	Disc	Total	Frequency
General Membe	Default Annual Merr	1	1200	\$0.00	\$1,200.00	Annually

Cancel Done

Automated Post-Signup Actions

Timeline item will be automatically updated

Email alert will be sent to those who have subscribed

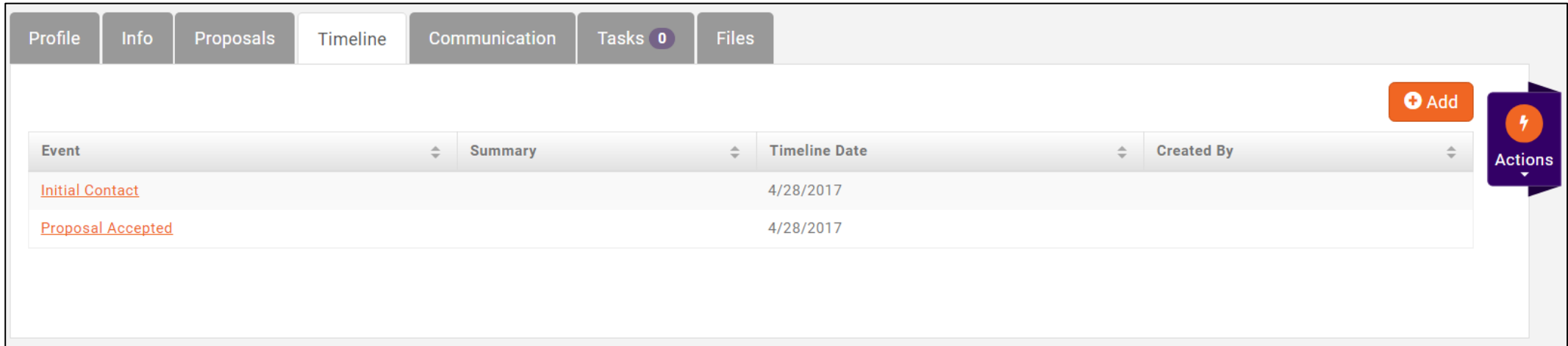
Proposal will be marked as accepted

Won/Lost Date will be updated

Time-line items

Time-line items. Your sales opportunity milestones can be tracked with timeline items. Examples of milestones may include when this first became an opportunity, or when you sent the proposal

WIKI: [Sales Proposal Timeline Items](#)



Event	Summary	Timeline Date	Created By
Initial Contact		4/28/2017	
Proposal Accepted		4/28/2017	

The Member Recruitment Reports help you understand the effectiveness of sales activities and the efficiency of the sales process:

- Member Recruitment Report
- Sales Opportunity Communication Report
- Sales Proposal Report
- Timeline Summary Report

Member Recruitment Reporting



The **Member Recruitment Report** provides you with many ways to analyze the opportunities in your funnel. For Example: you may analyze based on salesperson, sales source, sales probability, etc.

WIKI: [Member Recruitment Report](#)

Contact Name	Default Email	Default Phone	Sales Person	Estimated Close Date	One Time Value	Recurring Value	Total Value	Status	Reason	Stage	Timeline	Timeline Date
-			Matt Anakkala		\$0.00	\$0.00	\$0.00	Active			Initial Contact	5/11/2018
Aiden's Shoes	aiden@mailinator.com		Sheryl Rassler	5/2/2018	\$50.00	\$1,200.00	\$1,250.00	Active		Initial Contact	Initial Contact	4/11/2018
Antiques on Main Street	dgoerges@mailinator.com	218-765-7654	Cheri Petterson	4/28/2017	\$25.00	\$1,200.00	\$1,225.00	Won	Won	Closed - Won	Proposal Accepted	4/28/2017
Bayview Motel			Brandon Zinda	5/11/2018	\$2,000.00	\$0.00	\$2,000.00	Won	Want member to member benefits	Hot	Proposal Accepted	4/11/2018
Blossom's	blossoms@mailinator.com	215-777-9876	Cheri Petterson		\$25.00	\$1,200.00	\$1,225.00	Active			Initial Contact	
Boardwalk Marina	jmichah@mailinator.com	503-445-5788	Cheri Petterson		\$25.00	\$1,200.00	\$1,225.00	Active			Initial Contact	9/28/2017
Business XYZ			Matt Anakkala		\$0.00	\$0.00	\$0.00	Active			Initial Contact	5/4/2018
Cooking with Susie	soverholser@mailinator.com		Matt Anakkala	4/28/2017	\$25.00	\$1,200.00	\$1,225.00	Won	Won	Closed - Won	Proposal Accepted	4/28/2017
Dollars Drive Landscaping & Nursery	DollarsDrive@paulbunyan.net	218-987-9876	Sheryl Rassler	8/11/2017	\$100.00	\$2,000.00	\$2,100.00	Won	Won	Initial Contact	Proposal Accepted	8/11/2017
Ginny	ginny@mailinator.com		Cheri Petterson		\$25.00	\$1,200.00	\$1,225.00	Won		Closed - Won	Proposal Accepted	5/21/2017

Member Recruitment Report

Back Run Report

Member Recruitment Report

Sales Persons
None Selected

Sales Source
None Selected

Estimated Close Date
No Dates Selected

Additional Criteria / Filters
+

Display Options

Fields to Display
Contact Name, Default Email, Default Phone, D
Estimated Close Date, One Time Value, Re
Recurring Value, Sales Person, Stage, Status,
Timeline Date, Total Value

Sales Statuses
None Selected

Sales Categories
None Selected

Probability
No Range Selected

Sales Stages
None Selected

Created Date Range
No Dates Selected

Membership Type
None Selected

Sales Dispositions
None Selected

Won/Lost Date Range
No Dates Selected

Good/Service Item
None Selected

	Contact Name	Default Email	Default Phone	Estimated Close Date	One Time Value	Recurring Value	Total Value	Status	Reason	Stage	Timeline	Timeline Date
Cheri Petterson												
	Blossoms		215-777-9876		\$25.00	\$1,200.00	\$1,225.00	Active		Initial Contact		
Cheri Petterson Count\Average\Totals	1				\$25.00	\$1,200.00	\$1,225.00					
Matt Anakkala												
	Maison de Chocolat				\$25.00	\$1,200.00	\$1,225.00	Active		Initial Contact	Initial Contact	4/28/2017
Matt Anakkala Count\Average\Totals	1				\$25.00	\$1,200.00	\$1,225.00					
Grand Count\Average\Totals	2				\$50.00	\$2,400.00	\$2,450.00					

Member Recruitment Reporting

The **Sales Opportunity Communication Report** will show you a list of sales opportunities, and the number of days since the last communication

WIKI: [Sales Opportunity Communication Report](#)

Results		
Sales Person ↕	Prospect Name ↕	Days since contact ↕
Matt Anakkala	.	0
Matt Anakkala	Newtons Farm	7
Matt Anakkala	Business XYZ	7
Cheri Petterson	Antiques on Main Street	9
Cheri Petterson	Blossom's	22

Member Recruitment Reporting

The **Sales Proposal Report** allows you to generate a list of all the sales proposals you have created

WIKI: [Sales Proposal Report](#)

Results									
Contact Name ↕	Sales Person ↕	Proposal Name ↕	Valid Until ↕	Status ↕	Stage ↕	Sales Proposal Item ↕	Sales Proposal Item Price ↕	One Time Value ↕	Recurring Value ↕
Antiques on Main Street	Cheri Petterson	General Membership	6/27/2017	Won	Closed - Won	Setup	\$25.00	\$25.00	\$0.00
Antiques on Main Street	Cheri Petterson	General Membership	6/27/2017	Won	Closed - Won	Default Annual Membership	\$1,200.00	\$0.00	\$1,200.00
Bayview Motel	Brandon Zinda	Bayview Motel Sponsorship Proposal	6/10/2018	Won	Hot	Bronze Level Sponsorship	\$2,000.00	\$2,000.00	\$0.00
Blossom's	Cheri Petterson	General Membership	7/23/2017	Active	Initial Contact	Setup	\$25.00	\$25.00	\$0.00
Blossom's	Cheri Petterson	General Membership	7/23/2017	Active	Initial Contact	Default Annual Membership	\$1,200.00	\$0.00	\$1,200.00

Member Recruitment Reporting

The **Timeline Summary Report** summarizes all timeline items for each sales opportunity in your database

WIKI: [Timeline Summary Report](#)

Contact Name ↕	Default Email ↕	Default Phone ↕	Sales Person ↕	Stage ↕	Initial Contact Date ↕	Proposal Sent Date ↕	Proposal Accepted Date ↕	Personal Visit Date ↕	Ambassador Call Date ↕	Invite to monthly lunch Date ↕	Personal Invite to BOH Date ↕	Initial Email Date ↕	2nd phone call Date ↕	Drop Date ↕
Joe's Pizzeria	jranard@mailinator.com		Cheri Petterson		3/17/2017									
The Ski Hill			Cheri Petterson	Closed - Won			5/7/2017							
Morgan Golf Club		2185647788	Cheri Petterson	Initial Contact	4/24/2017	4/27/2017	4/27/2017							
Ginny	ginny@mailinator.com		Cheri Petterson	Closed - Won	4/27/2017		5/21/2017	5/4/2017						

Questions?



Customer Service Hours:

Monday-Friday: 8am to 5pm (Central)

GZSupport@growthzone.com

800.825.9171, Option 4, then Option 2

Online Support Wiki:

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Training Calendar:

[View Training Event Calendar »](#)

Integrated Help/Chat:

[Chat with Support](#)