GrowthZone – Member Recruitment: Initial Setup

Agenda

Overview of Member Recruitment Module

Initial Setup

- Sales Opportunity Categories
- Sales Sources
- Sales Stages
- Sales Opportunity Status Reasons
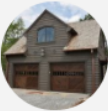- Auto-Reminders
- Time-line Items

Setting up your Sales Proposal Template

Overview

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

Opportunities may include:

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

Overview

The Garage Museum ✏

[Active] [*Account Number*]   Add Tags

‹ 11 of 13 ›

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

Save

⚡ **Action**

Sales Person
Cheri Petterson ▼

Category
New Membership ▼

Sales Status
Won ▼

Sales Stage
Closed - Won ▼

One-Time Revenue
25

Recurring Revenue
1200

Estimated Close Date
5/5/2017 📅

Probability
100

Created Date
4/28/2017

Status Reason
Won ▼

Sales Source
Email Campaign ▼

Won/Lost Date
5/7/2017 📅

Manage Custom Field

Annual Revenue

Number of Employees

❓

4

Member Recruitment Report

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.

Results

Contact Name ⇕	Default Email ⇕	Default Phone ⇕	Sales Person ⇕	Estimated Close Date ⇕	One Time Value ⇕	Recurring Value ⇕	Sales Source ⇕
Antiques on Main	dgoerges@mailinator.com	218-999-7654	Cheri Petterson	4/28/2017	$25.00	$1,200.00	Tradeshow
Blossoms		215-777-9876	Cheri Petterson		$25.00	$1,200.00	Email Campaign
Cooking with Susie	soverholser@mailinator.com		Matt Anakkala	4/28/2017	$25.00	$1,200.00	Email Campaign
Ginny's Photography		218-99-1234	Cheri Petterson	6/16/2017	$25.00	$1,200.00	Email Campaign
Hooks	nancy@mailinator.com		Cheri Petterson		$0.00	$0.00	Cold Call
Lacies Floral	lacies@mailinator.com		Sheryl Rassler		$25.00	$1,200.00	Email Campaign
Lilliputts	lpetterson@mailinator.com		Cheri Petterson	4/28/2017	$25.00	$1,200.00	Email Campaign
Maison de Chocolat	frank@mailinator.com		Matt Anakkala		$25.00	$1,200.00	Email Campaign
McBlooms Floral		215-999-6543	Cheri Petterson		$25.00	$1,200.00	Email Campaign
Morgan Golf Club		2185647788	Cheri Petterson	4/28/2017	$25.00	$1,200.00	Email Campaign
Silver Casino			Sheryl Rassler		$25.00	$1,200.00	Email Campaign
The Garage Museum	wharkens@mailinator.com		Cheri Petterson	5/5/2017	$25.00	$1,200.00	Email Campaign
The Malt Shop	jmalt@mailinator.com		Brandon Zinda	5/26/2017	$25.00	$1,200.00	Email Campaign
The New Bakery		216-897-0000	Cheri Petterson	6/9/2017	$25.00	$1,200.00	Email Campaign
The Ski Hill			Cheri Petterson	3/29/2017	$25.00	$1,200.00	Email Campaign
Count\Average\Totals	15				$350.00	$16,800.00	

Sales Opportunity Categories

Sales Opportunity Categories are used to further organize your Member Recruitment opportunities. For Example, you may have a category called Membership which could be over-arching of the types of membership opportunities you offer (i.e. new memberships, upgrades, etc.). You can create your categories on the fly when creating an opportunity, or you may create them ahead of time under the Setup functions.

WIKI: Setup Member Recruitment Categories

Sales Sources

Sales Sources are used to track how you learned of the opportunity. Examples of Sales Sources might include referral, trade-show, walk-in and so on.

You can associate your sales sources to opportunities to help you understand where your opportunities are coming from, and if you win you can look back to see what sales source it came from.

WIKI: Setup Sales Sources

Sales Stages

Sales stages allow you to identify the level of engagement a prospect has had with your sales team

You may define sales stages that match your business processes. Examples of stage may include hot, warm, cold and so on. You may customize these to meet your needs

WIKI: Setup Sales Stages

Sales Opportunity Status Reasons

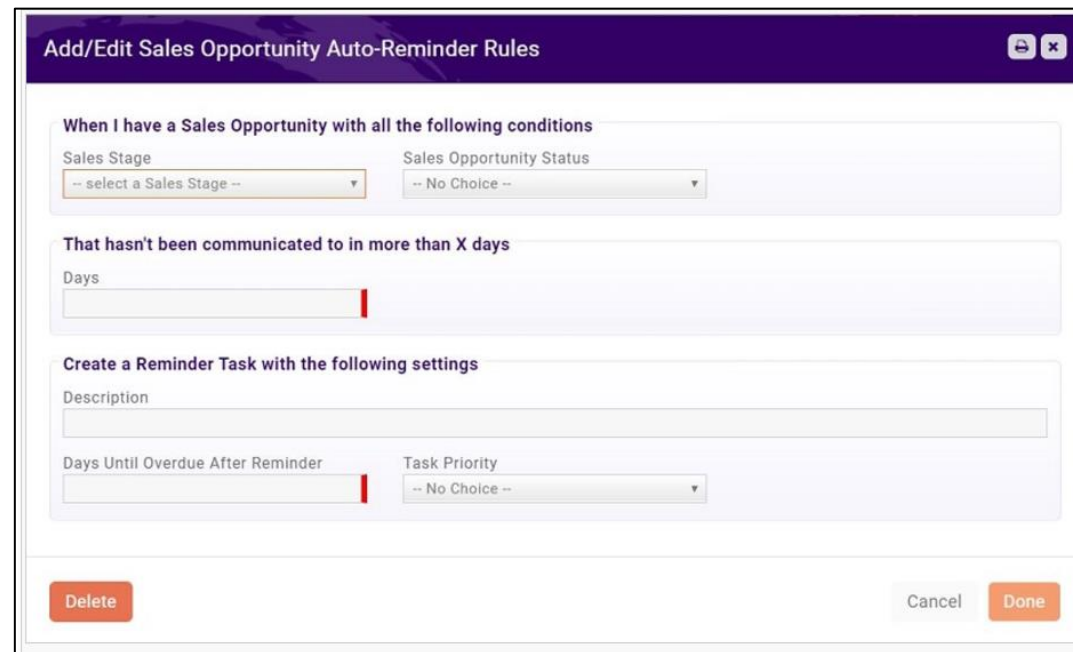**Sales Opportunity Status Reasons** allow you to identify why an opportunity may be stuck in a particular status

For Example, you may have a status called on-hold, and provide a reason such as "Expense" that tells you the cost of the sale may be too much

WIKI: Setup Sales Opportunity Status Reasons

Sales Opportunity Auto-Reminders

Automatic-Reminders Rules may be setup to notify staff of opportunities that have not been communicated to in a configurable number of days

WIKI: Setup Auto-Reminders
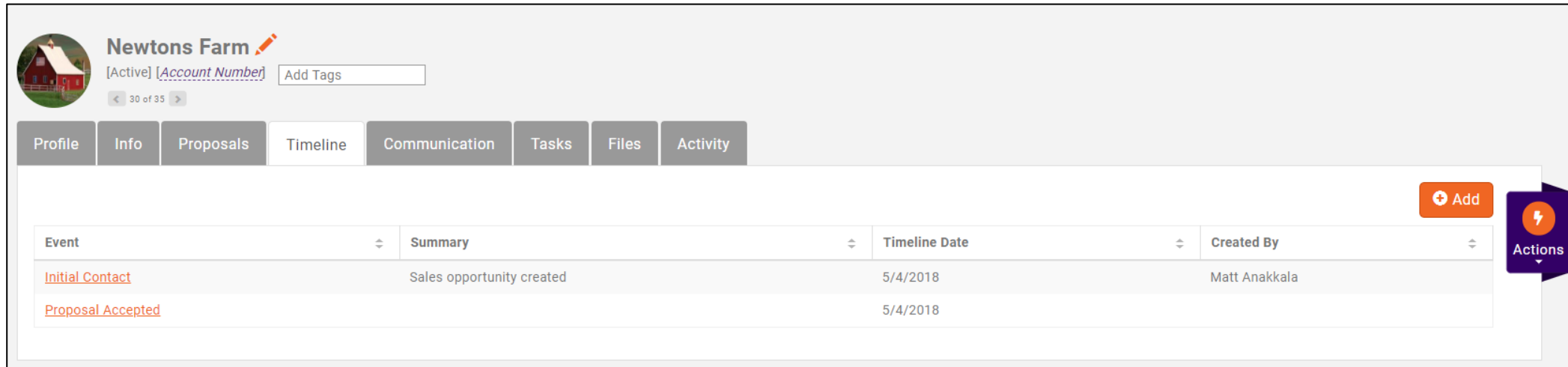
Time-line Items

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: Setup Timeline Items

Automating Timeline Items

You can automatically update your timeline with a timeline item for new opportunities and when a proposal is accepted

- **Timeline Item Applied To New Opportunities (General Settings)**
- **Timeline Item Applied To Signups (Proposal Settings)**

WIKI: Automating Timeline Items

Create Proposal Template

If your sales proposals follow a similar pattern, you may create a template where the standard items are already filled in, and customize it when needed.

A sales proposal template is included in your database. It is formatted to pull in key information, such as the logo information, contact information and so on. for the sales opportunity. If needed, you can customize this template to meet your needs.

WIKI: Create Sales Proposal Template

Questions?

Training and Support

Customer Service Hours:
Monday-Friday: 8am to 5pm (Central)
GZSupport@growthzone.com
800.825.9171, Option 4, then Option 2

Online Support Wiki:
Access Wiki »

Training Calendar:
View Training Event Calendar »

Integrated Help/Chat:
Chat with Support