



GrowthZone On-Site Training

Training is essential to your success in implementing the GrowthZone solution. Our goal is to provide you and your staff with the skills needed to maximize the potential of the software to acquire members, retain and engage members and do more with less time.

Customize your On-site Training Agenda

You may choose a combination of any of the training sessions below to customize your on-site training experience.

GrowthZone Solution Overview

The GrowthZone Solution Overview session is an introductory course to help new users (or those requiring a refresher) learn how to navigate in GrowthZone. This session will introduce participants to general navigation of the software and an overview of each module will be shared to provide a basic understanding of what each module will accomplish.

Agenda:

- Overview
- Software Navigation
- Common Functions
- GrowthZone Modules:
 - Modules to Acquire New Members
 - Modules to Retain & Engage Members
 - Modules to do More with Less Time





Getting Started with GrowthZone – the Basics

GrowthZone is the smarter association software designed to help you: acquire new members, retain and engage your existing organizations or individuals, and do more with less time. In this session, participants will learn the basic setup steps, in the recommended order, to perform initial setup of the system to ensure the best foundation.

Agenda:

- Configuring Organization Information
- User Permissions/Access
- Defining Categories & Lists
- Setting Up Billing
- Payment Gateways
- Goods & Services
- Setup Membership
- Setting up Membership
- Setting up Info Hub

GrowthZone Communications - The Basics

The GrowthZone Communications and List/Committee modules make it easy to connect with your board and to organize your contacts into lists for different types of communication. In this session, participants will learn how to setup and manage communications.

Agenda:

- Setting up Communications
- Sending/Scheduling Emails
- Logging Calls & Notes
- Reviewing Communications

GrowthZone - Managing Contacts - The Basics

Acquiring and managing contacts is made easy with GrowthZone. In this session, participants will learn the basics of setting up and managing their contacts.

- Contact management module
- Adding new contacts
- Managing status, account number, tags
- Updating information
- Add/Update/Delete Contact
- Info Hub Access





GrowthZone - Membership Management - The Basics

Acquiring and managing members is made easy through your GrowthZone software. In this session participants, will learn the skills to setup and manage their memberships.

- Application Form Settings & Options
- Managing Membership Types & Packages
- Managing Memberships - upgrade, downgrade, adjustments, drops
- Membership Reports

GrowthZone - Event Management - The Basics

The GrowthZone Events module is designed to help you navigate every aspect of the event process - everything from inviting attendees to tracking registrations to creating invoices. In this session, participants will learn the basics of setting up events.

Agenda:

- Overview of Event Management
- Initial Setup
- Add & Edit Event
- Managing Registrations
- Engaging your Members
- Event Reporting

GrowthZone - Managing Billing - The Basics

GrowthZone allows you to easily generate invoices, send invoices, and manage payments. In this session, participants will learn the basic steps to managing their billing.

Agenda:

- Integrated Payment Processing
- Managing Invoicing/Payments
- Managing Bulk Invoicing
- Managing Deposits
- Billing Reporting





GrowthZone – Working with Projects/Tasks

The Projects/Tasks module allows you to manage all your projects from one location, assign tasks to individuals on your staff, and track progress as it happens. For projects that get repeated (New Member Onboarding, for example), Project Templates can be created to save time and energy. This webinar will cover the creation and management of Projects.

Agenda:

- Overview of Projects/Tasks
- Creating New Projects
- Tasks/Task Items
- Tracking Project progress
- Project Templates

GrowthZone – Sales Funnel

The GrowthZone Sales Funnel is a module that allows you to track the progress of various opportunities from Lead to Win. In this session, participants will learn how setup and manage the sales funnel.

Agenda:

- Overview of Sales Funnel Module
- Initial Setup for Sales Funnel
- Overview of Sales Funnel Module
- Initial Setup for Sales Funnel
- Create Sales Opportunity
- Generate Proposal & Signup Link
- Understand Workflow Processes
- Understanding Timeline Items
- Generate Sales Funnel Reports

Working with Web Content

Grow your community and add value with web content that integrates data from your GrowthZone AMS with your website. In this session, participants will learn how to setup and manage web content (including hot deals, job postings, and news releases)





Agenda:

- Setting Up Content Lists
- Customizing Job Postings, Hot Deals, News
- Adding Content to your Web-site (GZCMS)
- Adding Job Posting, Hot Deals, News from the Back Office
- Managing Content Submitted By Members
- Web Content Activity Report

GrowthZone – Working with Forms

The GrowthZone Forms/Surveys module enables you to quickly create and publish custom web forms and surveys. In this session, participants will learn how to create, distribute and analyze forms.

Agenda:

- Overview
- Creating Forms
- Distributing Forms
- Working with Responses
- Analyzing Responses

Marketing Automation

Do you want to automate a drip campaign for your new members? Or perhaps you would like a nurturing program for existing members. The GrowthZone Marketing Automation module helps make this possible. In this session, participants will learn how to make the most of the Marketing Automation module. Course Length: 1 hour

Agenda:

- Pre-requisites
- Add a Marketing Workflow
- Monitor & Manage Workflow
- Workflow Metrics





Working with the Store Module

Using the GrowthZone you can sell merchandise (including downloadable files) on your website and manage the process with your GrowthZone AMS. Course Length: 1 hour

Agenda

- Setting up Your Store
- Adding Products to the Store
- Managing Store Orders
- Store Reports

Realtor Training Modules

NRDS Integration

The GrowthZone integration with the National Association of REALTORS' NRDS database provides association staff an easy way to manage their contacts' NRDS data. Course Length: 2 hours

Agenda

- Review of Initial NRDS Setup
- Managing NRDS Offices
- Managing NRDS Agents
- Managing NRDS Education Record
- NRDS Financial Record
- Understanding the 2 Way sync Process
- Review Event Log for Errors

NAR Ecommerce

GrowthZone provides integration with NAR ECommerce. Through this integration you can easily handle splits of membership dues, accept credit card payment, store credit cards for future use and more. Course Length: 2 hours

Agenda

- Review of Initial Setup & Splits
- Membership Billing
- Payment Processing





MLS Integration

GrowthZone provides integration to many MLS systems. Through integration you will be able to update information withing GrowthZone, and sync that information to your MLS. Couse Length: 1 hour.

- Initial Setup
- Working with Offices
- Working with Agents

LockBox Integration

GrowthZone provides integration to many MLS systems. Through integration you will be able to update information withing GrowthZone and sync that information to your MLS. Couse Length: 1 hour.

Agenda

- Initial Setup
- Working with Offices
- Working with Agents

On-site Training Fees*

One Day: \$3800

Each Additional Day: \$1200

**One day of training consists of 6 hours of instructions – generally 9am – 4pm (1-hour lunch)*

**Fees include all trainer travel expenses*

Training Facility Requirements

The following training facility requirements are necessary to ensure a successful training

- Facility conducive to classroom training
- Laptop/PC for all participants
- Overhead projector/screen
- Whiteboard/Flipchart





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