GrowthZone
smarter association software

WELCOME TO GROWTHZONE

SOFTWARE ONBOARDING GUIDE

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- THE ONBOARDING PROCESS
- WHAT TO PREPARE FOR ONBOARDING

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This Guide

The purpose of this guide is to introduce you to your GrowthZone onboarding team, help you understand the onboarding process, and gather key information from you – all with the goal of making your transition to GrowthZone software go smoothly.

Meet the GrowthZone Team

You will be working with a dedicated project manager from our talented onboarding team:

Aimee Thurston
Choral Enthusiast.
Outdoor Adventurer.
Dog Lover.

Ariel Thompson
"Start saying today
is the day."

Cheri Petterson
"Through our Training &
Documentation, we ensure
that you learn exactly what
you need to appreciate the
value of your GrowthZone
software."

Dan Rekstad
"The day I stop giving is the
day I stop receiving. The day I
stop learning is the day I stop
growing. You miss 100% of
the shots you don't take."
- Wayne Gretzky

Erica Bernhardt
"Optimism is a happiness
magnet. If you stay positive,
good things and good people
will be drawn to you."
- Mary Lou Retton

Eileen Reish
"I enjoy getting to know our
clients and learning about all
their different types of
associations."

Erin Leibold
"The achievements of an
organization are the results
of the combined effort of
each individual."
- Vince Lombardi

Kim Stout
"Don't count the days;
make the days count."
-Muhammad Ali

Kris Knutson
"I love the great outdoors."

Marc Schwankl
"Two things I strongly believe
in life. 1: Bean-Hole-Days
should be a national holiday.
2: Your future is whatever
you make it. So, make it a
good one!"

Mindy Ostrander
"So often in life, things
that you regard as an
impediment turn out to be
great, good fortune."
– Ruth Bader Ginsburg

Tim Leonard
"Music is the soundtrack to
our lives. There is a song for
every occasion."

About Your Team

Role	Name	Email Address
Project Lead		
Membership		
Billing/Accounting		
Events		
Communication		
Others:		

Our Commitment to You

During the onboarding process, our goals are to effectively transition your organization to GrowthZone software and provide you with tools to maximize your efficiency using the software for years to come.

Your Commitment to Us

- Involve the right stakeholders.
- Be willing to compromise on some processes and mindsets. There will be processes that are different than you're used to; we have worked with hundreds of customers on this platform and will guide you through best practices.
- Commit to the training plan and do your prep before each session.

What We Need From You Before Your Kickoff Meeting

We will be in touch soon to set up a kickoff meeting with your team and your GrowthZone Onboarding Manager. In the meantime, please prepare for the meeting by collecting the following information.

- **We will migrate your data into a sandbox** - you'll feel more comfortable training with some familiar data.

  - ❑ NEEDED FROM YOU: Clean your data as much as possible before your data migration. Remember that bad data in will provide you with bad data out of your new GrowthZone database. A few examples of data cleanup:

    - ❑ Remove duplicates

    - ❑ Identify old data that can be archived

    - ❑ Review and address any open invoices

  - ❑ NEEDED FROM YOU: We will need your clean data file at the start of your onboarding. Every system is different in what it takes to export your data, so starting that conversation with your GrowthZone Onboarding Manager early is important.

- We complete your **key setup on your behalf** for the main areas of the software so we can apply best practices, and you don't need to spend time on settings you may never need to change.

- We work **backward from your most important goal** and any key dates to ensure launch is aligned for success.

- We follow a **training cadence** that has proven effective.
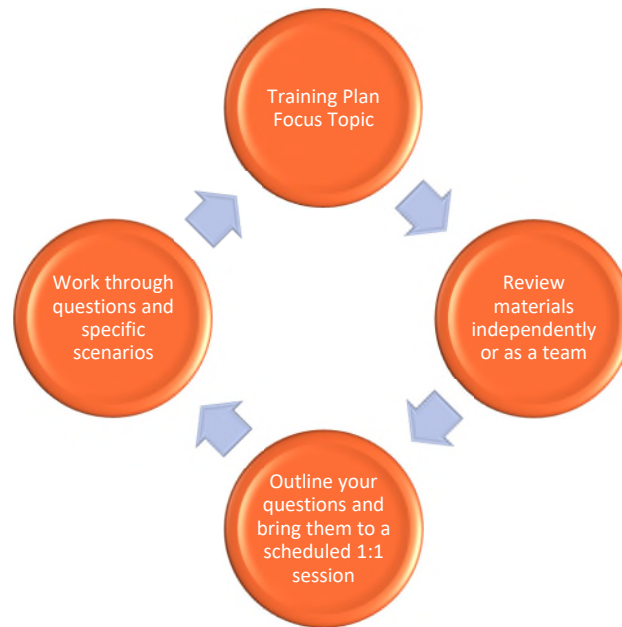
- We define whether you want to set a standing time for questions or specific training topics or if you prefer to book time with us when needed using a scheduling link.

Prepare Now for Your Kickoff Meeting
ITEMS TO PREPARE

❑ Outline **key dates or milestones** we should know about – especially if you have deadlines related to your current system.

❑ Determine which of the following key aspects of your onboarding process are your **top three priority** areas (this will help us with the onboarding time blocks):
- Managing Contact Relationships
- Accepting and Managing Memberships
- Member Engagement
- Member Communication
- Billing and Accounts Receivable
- Event Management
- Website Integration

❑ Identify your **source systems for your data** and make sure you have the process underway for access/compiling.

❑ Be ready to provide your **Chart of Accounts**. Here is an example of what we will be setting up:

Number	Name	Type
MEM-REV	Income Account	Revenue
DEP-CASH	Deposit Account	Current Asset
ACCT-RECV	Accounts Receivable Account	Current Asset
DEF-MEM-REV	Deferred Revenue Account	Current Liability
DEF-DIS	Discount Account	Revenue
DEF-DEF-DIS	Deferred Discount Account	Current Liability
DEF-GEN-TAX	General Tax	Current Liability

❑ Be ready to provide your **Billable items list** (Goods & Services). Review if there are any items you want to inactivate or remove before setting it up in GrowthZone. Here is an example screen of what we will be setting up as a reference:

Type	Name	Income Account	Recognition Type	Default Price
Membership Dues	Membership	Income Account	Accrual	$1,200.00
Membership Dues	Membership Setup	Income Account	Accrual	$1,000.00
Event Registration	Event Registration	Income Account	Accrual	$50.00
Sponsorship	Sponsorship	Income Account	Accrual	$500.00
Event Registration	Event Registration	Income Account	Accrual	$500.00
Event Sponsorship	Event T-Shirt	Income Account	Accrual	$15.00

❑ Be prepared to provide a summary of your **membership dues structure** and breakdown. Many systems do not provide flexibility in your membership dues structure. However, GrowthZone allows you to define things such as membership levels, which many customers will choose to put into place within GrowthZone. Here is an example of what that can look like (in this example, we have a single membership type, but it can be set up with different pricing levels based on employees, units, etc.):

Select An Option

◉ General Membership $105 Annually + $35 One-Time Fee + Price of Level Selected (Price Range: $263 - $1260 Annually)
Select Level

Less than 10 Employees: $263 Annually

Less than 10 Employees: $263 Annually
10-20 Employees: $525 Annually
21-50 Employees: $1050 Annually
51-100 Employees: $1260 Annually

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...cles as content on our site.

❑ Gather key information for setting up your **GrowthZone Pay payment processing**, including bank routing and account numbers, Tax ID number, and Responsible Party.
❑ Complete the Web Site Success Plan if we are developing your site.
❑ Gather the details on **who manages your domain and hosting**.

Next Steps – The Onboarding Process