

GrowthZone Regional Training – Day One

Please bring your laptop to each training session to participate in hands on exercises.

9:00 – 11:30

Getting to Know GrowthZone

System Navigation

Initial GrowthZone setup

- Setting up Staff/Members User Permissions & Profiles
- Setting up Communications
 - Documentation Templates
 - Setting up Lists & Committees
- Setting up Directories
- Initial Billing Setup
 - Chart of Accounts
 - Setting up Goods/Services
 - Financial Settings

11:30 – 12:30 – Lunch on Own

12:30 – 4:00

Acquiring & Retaining Members

- Working with Contacts
- Setting up Membership Types & Membership Application Form
- Managing Members
 - On-boarding
 - Billing
- Working with Web Content
 - Job Postings
 - Hot Deals
 - Blogs
- Introduction to Info Hub
- Analyzing Membership Reports