

Managing Your Projects

Agenda

- Overview
- Initial Set Up
- Creating a Project
- Monitoring Projects
- Project Management Reports



PROJECT MANAGEMENT

Manage all projects from one location and track according to individual, organization, membership, and event.

Overview

The GrowthZone Project Management module will help you to organize and manage projects from beginning to end

The module can be used to manage your member acquisition, member on-boarding, events, and more. If you have projects that are repeatable (such as member on-boarding) you can create a project template to be re-used, saving you time

Overview

If you have projects that are repeatable (such as member onboarding or annual events) you can create a project template to be re-used, saving you time. Additionally, the project management module allows you to create and monitor individual tasks that you may need outside of an actual project

Initial Setup

- **Project Types** -> How do you wish to categorize your projects (events, membership, fundraising)
- **Task Types** -> How do you wish to categorize your tasks (administrative, financial, communications, marketing, exhibitor management, etc.)
- **Project Templates** -> Do you have repeatable events (annual banquet, annual trade show, golf tournament)

Setup Project Types

Project types allow you to group together projects with similar characteristics. Examples of project types include: Event, Membership, Store Merchandising, etc.



The screenshot displays the 'Project Types' management interface. On the left, a list of existing project types is shown: Name, Member, Events, Volunteers, Programs, and Energy Show Project. An 'ADD' button is visible in the top right corner of this list. Overlaid on the right is the 'Add Project Type' dialog box. This dialog features a 'Name*' input field, a 'Custom Fields' section with a plus icon, and a table for defining custom fields. The table has columns for Object Type, Display Name, Field Data Type, Group Name, and Archived. Below the table, it indicates 'None to display'. At the bottom of the dialog are 'Cancel' and 'Done' buttons.

Object Type	Display Name	Field Data Type	Group Name	Archived
None to display				

Setup Project Task Types

Task Types allow you to identify common tasks that you will use in your projects. The task types are the selectable, and available for filtering and reporting purposes.

KB: [Task Types](#)

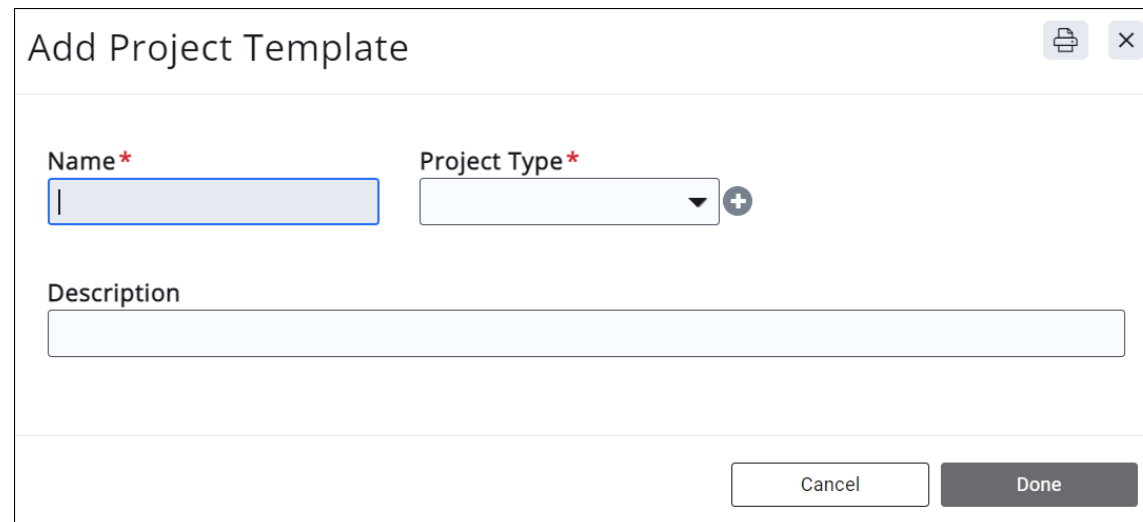
Edit Task Type < 1 of 12 >  

Name* Description Is Active

Setup Project Templates

Before getting started with setting up a template identify all the steps to get from the idea of an event to the actual event. Break those steps into smaller, bite-sized tasks and assign due dates to them.

Project templates can be created for projects that are repeatable, such as New Member On-boarding, Member Acquisition, Events, etc.



The screenshot shows a dialog box titled "Add Project Template" with a close button (X) and a print icon in the top right corner. The form contains the following fields:

- Name ***: A text input field with a blue border and a vertical cursor.
- Project Type ***: A dropdown menu with a downward arrow and a plus sign (+) to its right.
- Description**: A large, empty text area.

At the bottom right of the dialog, there are two buttons: "Cancel" and "Done".

Setup Project Templates

- For Example: Energy Show

- Task – Prep for Exhibitors

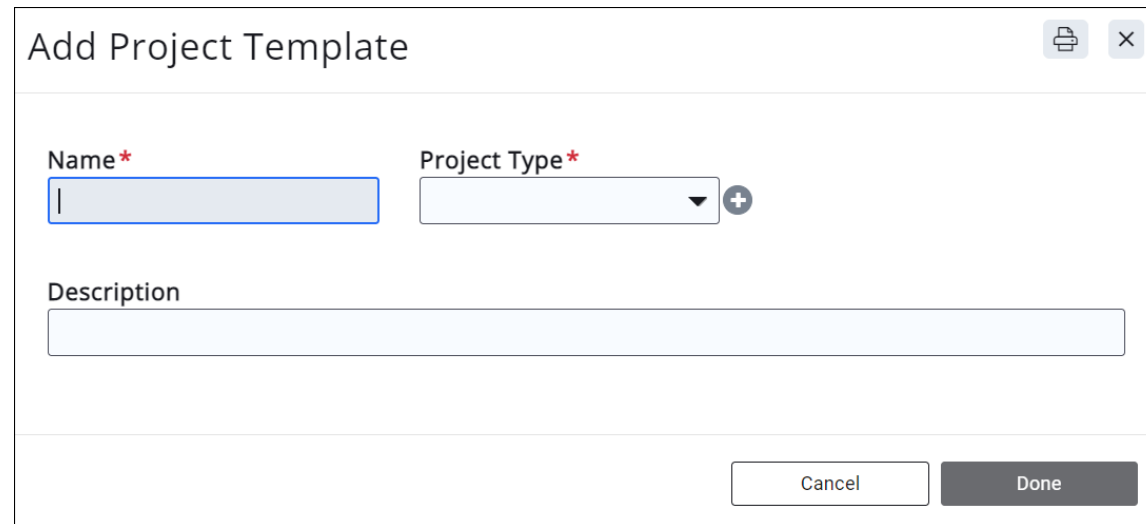
- Sub Items

- Make contact with exhibitors and send them information
 - Setup exhibitor registration
 - Invoice Exhibitors
 - Validate that deposits have been received
 - Validate that full payment is received by due date
 - Build exhibitor packages
 - Manage the drink ticket orders
 - Manage the invoicing and receiving of payments for Exhibitor golf

Setup Project Templates

Creating a template is a two step process:

1. Create the template



The screenshot shows a dialog box titled "Add Project Template" with a close button (X) and a print icon in the top right corner. The form contains the following fields:

- Name***: A text input field with a blue border and a vertical cursor.
- Project Type***: A dropdown menu with a downward arrow and a plus sign (+) to its right.
- Description**: A large, empty text area.

At the bottom right of the dialog, there are two buttons: "Cancel" and "Done".

WIKI: [Setup Project Templates](#)

Setup Project Templates

2. Add tasks to the template. Adding tasks to a template is optional, however, if your project will contain standard repeatable tasks, you can save time by entering them into the template.

Edit Project Template

< 1 of 6 > [Print] [Close]

Name* **Project Type***

Description

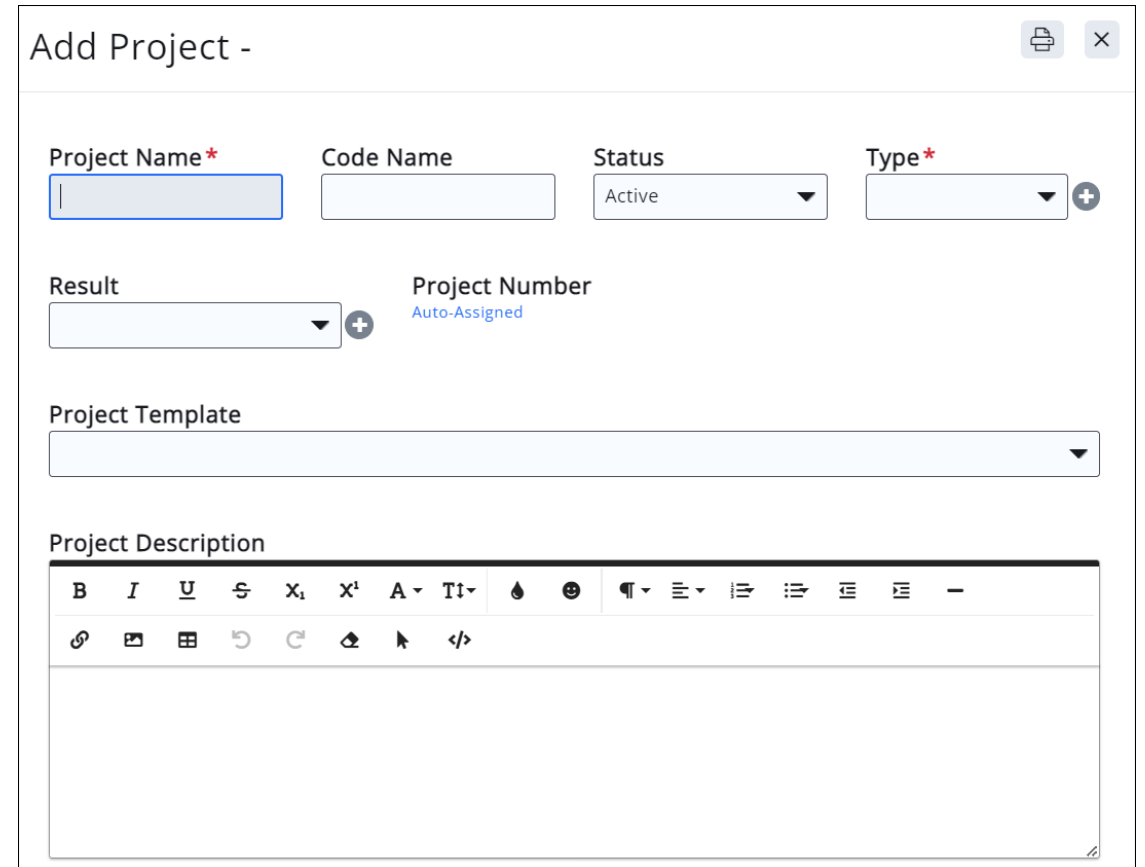
Template Tasks ADD TASK

	Name	Task Priority	Task Type	Assigned To Person	Start Date	Due Date	Completed Date
↑	Administrative	Important	Administrative				
↑	Send Welcome Email	Urgent	Ambassador				
↑	Mail new member packet.	Normal	Administrative				
↑	Call the member to say "Welcome to the Chamber."	Normal	Executive				

Create a New Project

When creating a project, you may either create a project from scratch, or you may use a template.

KB: [Create a New Project](#)



The screenshot shows a web form titled "Add Project" with the following fields and controls:

- Project Name***: A text input field with a blue border.
- Code Name**: A text input field.
- Status**: A dropdown menu with "Active" selected.
- Type***: A dropdown menu with a plus sign icon to its right.
- Result**: A dropdown menu with a plus sign icon to its right.
- Project Number**: A text input field with the value "Auto-Assigned" in blue text.
- Project Template**: A dropdown menu.
- Project Description**: A rich text editor with a toolbar containing icons for bold (B), italic (I), underline (U), strikethrough (ABC), text color (X), background color (X'), font color (A), font size (T), bullet point, numbered list, link, unlink, undo, redo, insert link, insert image, and code.

Monitoring & Updating Projects

Through project monitoring you can track of all project-related metrics including team performance and task duration, identify potential problems and take corrective actions necessary to ensure that the project is within scope and meets the specified deadlines.

KB: [Monitoring & Updating Projects](#)

Task Id	Name	Task Priority	Task Type	Contact	Assigned To Person	Due Date	Completed Date	Percent Complete
649239	Administrative	Important	Administrative		Cheri Petterson	2/2/2023	2/2/2023	100
649240	Send Welcome Email	Urgent	Ambassador		Cheri Petterson	2/2/2023	2/2/2023	100
649241	Mail new member packet.	Normal	Administrative		Cheri Petterson	2/2/2023		75
649242	Call the member to say "Welcome to the Chambe...	Normal	Executive		Cheri Petterson	2/2/2023		0
649243	Email instructions on how to access member ben...	Normal	Engagement		Cheri Petterson	2/9/2023		0

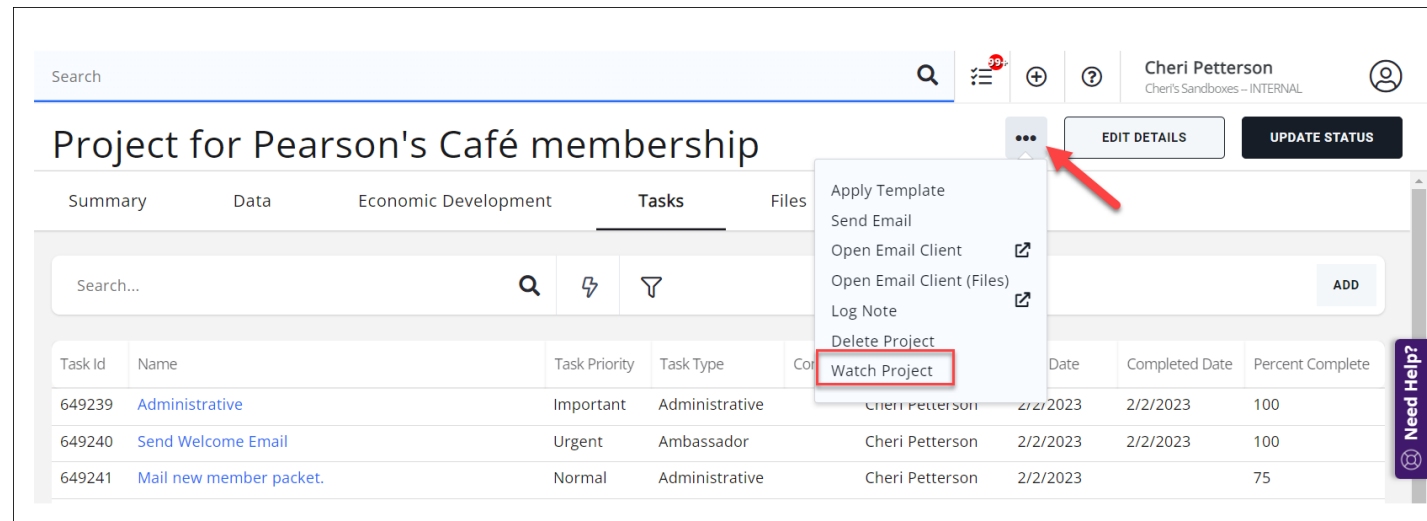
Need Help?

Monitoring & Updating Projects

Watch your projects... be sent eMail notifications when:

- A project they are watching is completed
- When a task is completed for a project they are watching

KB: [Watch a Project](#)



The screenshot displays a software interface for project management. At the top, there is a search bar and a user profile for 'Cheri Petterson'. The main heading is 'Project for Pearson's Café membership'. Below this, there are tabs for 'Summary', 'Data', 'Economic Development', 'Tasks', and 'Files'. A dropdown menu is open over the project, showing options: 'Apply Template', 'Send Email', 'Open Email Client', 'Open Email Client (Files)', 'Log Note', 'Delete Project', and 'Watch Project'. The 'Watch Project' option is highlighted with a red box. Below the menu, there is a table of tasks with columns for Task Id, Name, Task Priority, Task Type, Date, Completed Date, and Percent Complete.

Task Id	Name	Task Priority	Task Type	Date	Completed Date	Percent Complete
649239	Administrative	Important	Administrative	Cheri Petterson	2/2/2023	100
649240	Send Welcome Email	Urgent	Ambassador	Cheri Petterson	2/2/2023	100
649241	Mail new member packet.	Normal	Administrative	Cheri Petterson	2/2/2023	75

Monitoring & Updating Projects

KB: Update the Status of a Project

The screenshot displays a project management application interface. At the top, there is a search bar and user information for Cheri Petterson. The main heading is "Project for Pearson's Café membership". Below this, there are tabs for "Summary", "Data", "Economic Development", "Tasks", "Files", and "Communication". A red arrow points to the "UPDATE STATUS" button in the top right corner. A modal window titled "Edit Update Status" is open in the foreground, containing three input fields: "Status" (set to "Active"), "Result" (empty), and "End Date" (empty). The modal also includes "Cancel" and "Done" buttons. In the background, a table of tasks is visible with columns for "Task Id", "Name", "Created Date", and "Percent Complete".

Task Id	Name	Created Date	Percent Complete
649239	Administrative	23	100
649240	Send Welcome	23	100
649241	Mail new mem		75
649242	Call the membe		0
649243	Email instructi		0
649244	Call with an ev		0
649245	Make a check-in call / "Hello, how are things goin...	3/18/2023	0

Monitoring & Updating Projects

When change is necessary, you can edit project details, such as the description, type, contacts, etc.

- KB: [Edit Project Details](#)

Edit Project - Project for Pearson's Café membership

Project Name* Code Name Status Type*

Result Project Number

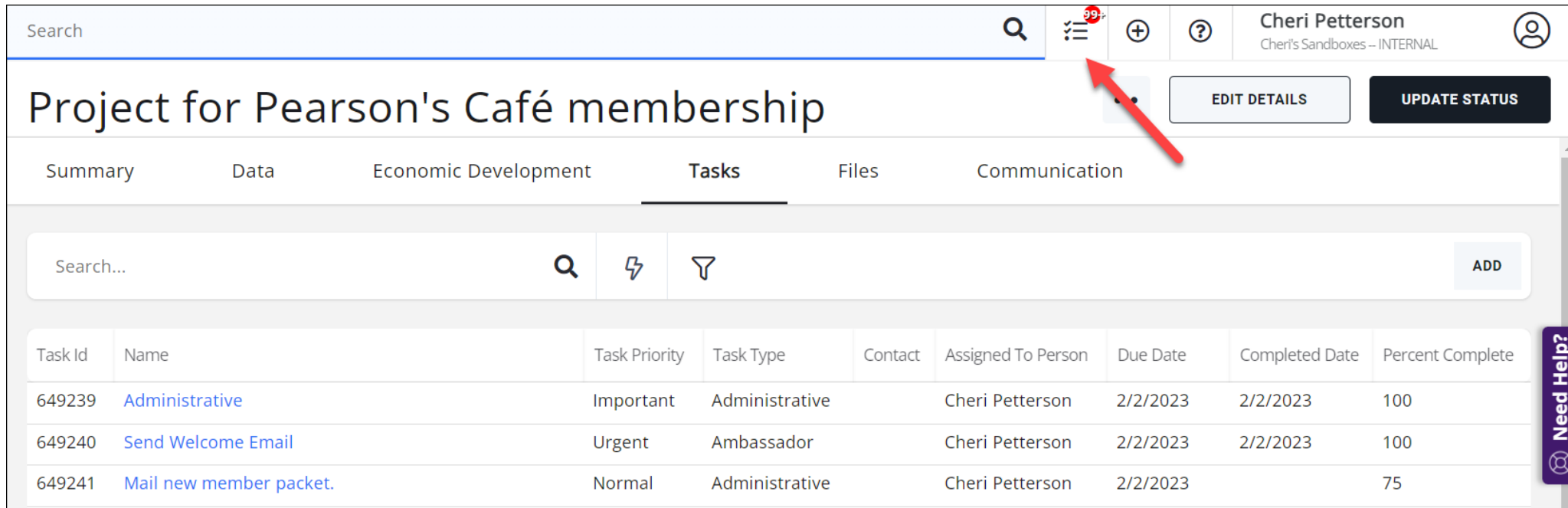
Project Description

B *I* U ~~S~~ ~~X~~ ~~X'~~ **A** **T**

Template to be used for Member On-Boarding

Monitoring & Updating Projects

The **Task List** icon in the header bar will notify to a staff member that they have tasks that need attention



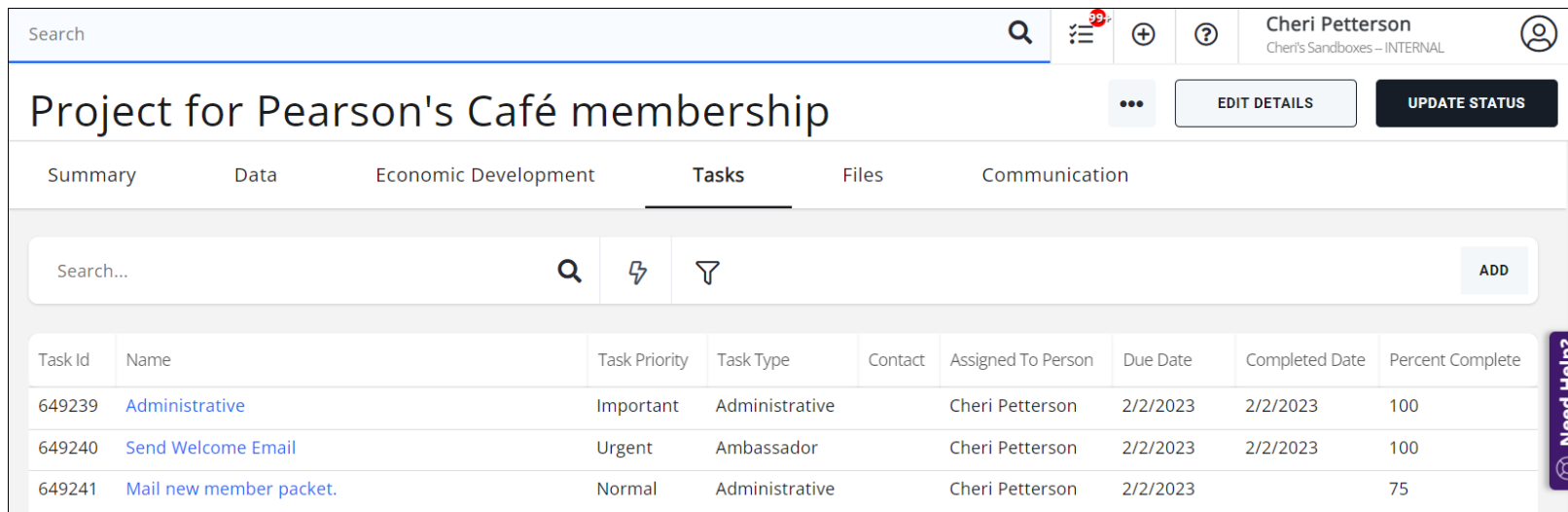
The screenshot shows a user interface for managing projects. The user is Cheri Petterson, logged in as 'Cheri's Sandboxes - INTERNAL'. The current project is 'Project for Pearson's Café membership'. The 'Tasks' tab is selected, showing a table of tasks. A red arrow points to the 'Task List' icon in the header bar, which has a notification badge showing '39'.

Task Id	Name	Task Priority	Task Type	Contact	Assigned To Person	Due Date	Completed Date	Percent Complete
649239	Administrative	Important	Administrative		Cheri Petterson	2/2/2023	2/2/2023	100
649240	Send Welcome Email	Urgent	Ambassador		Cheri Petterson	2/2/2023	2/2/2023	100
649241	Mail new member packet.	Normal	Administrative		Cheri Petterson	2/2/2023		75

Monitoring/Updating Individual Tasks

Once tasks have been assigned, the staff person to whom the task has been assigned will be sent an email notification and will be able to view and update task status

KB: [Monitoring & Updating Individual Tasks](#)



Task Id	Name	Task Priority	Task Type	Contact	Assigned To Person	Due Date	Completed Date	Percent Complete
649239	Administrative	Important	Administrative	Cheri Petterson	Cheri Petterson	2/2/2023	2/2/2023	100
649240	Send Welcome Email	Urgent	Ambassador	Cheri Petterson	Cheri Petterson	2/2/2023	2/2/2023	100
649241	Mail new member packet.	Normal	Administrative	Cheri Petterson	Cheri Petterson	2/2/2023		75

Project Reporting

- KB: [Projects Report](#)
- KB: [Project Started by Quarter](#)
- KB: [Project Summary Report](#)
- KB: [Task Report](#)

Questions?