Managing Your Projects

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Agenda

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

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

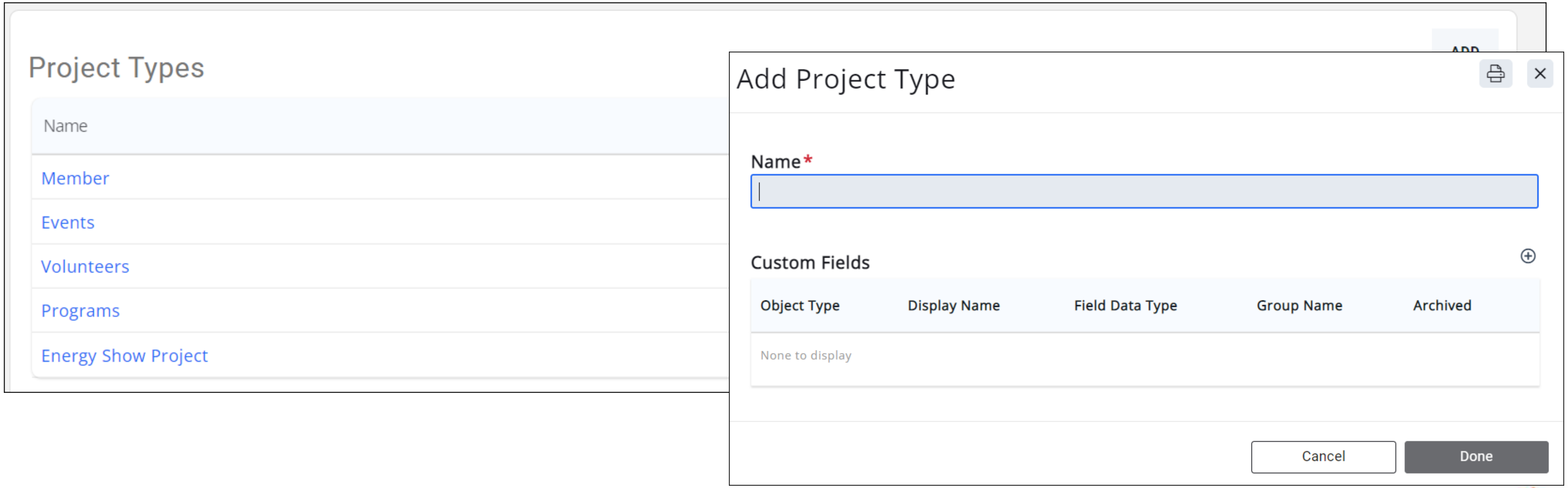
If you have projects that are repeatable (such as member on-boarding or annual events) you can create a project template to be re-used, saving you time. Additionally, the project management module allows you to create and monitor individual tasks that you may need outside of an actual project

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

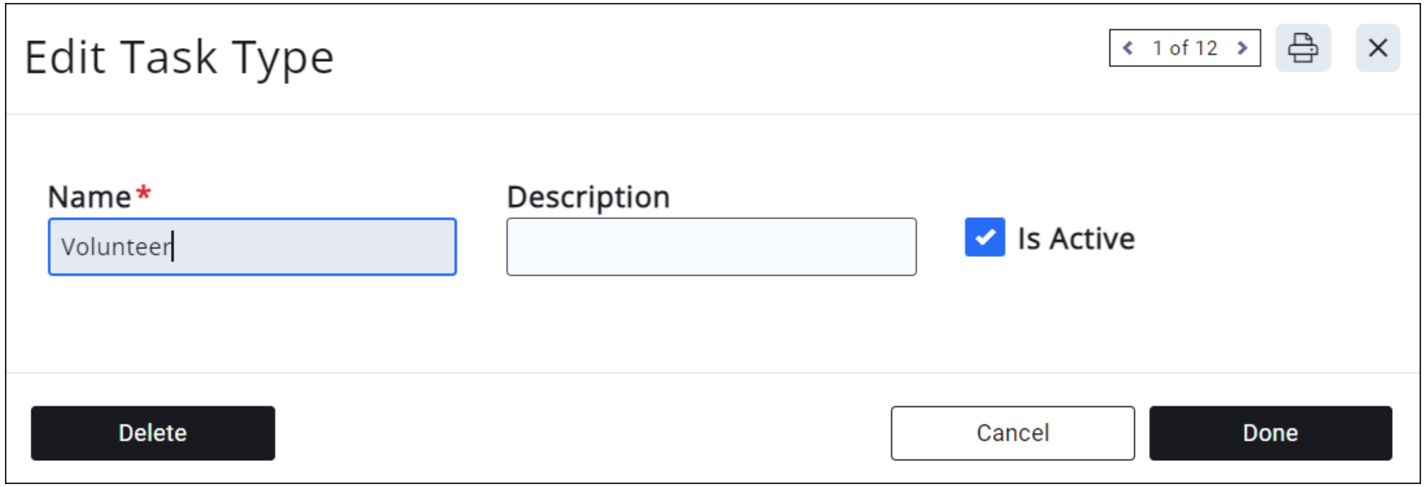
Project types allow you to group together projects with similar characteristics. Examples of project types include: Event, Membership, Store Merchandising, etc.



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



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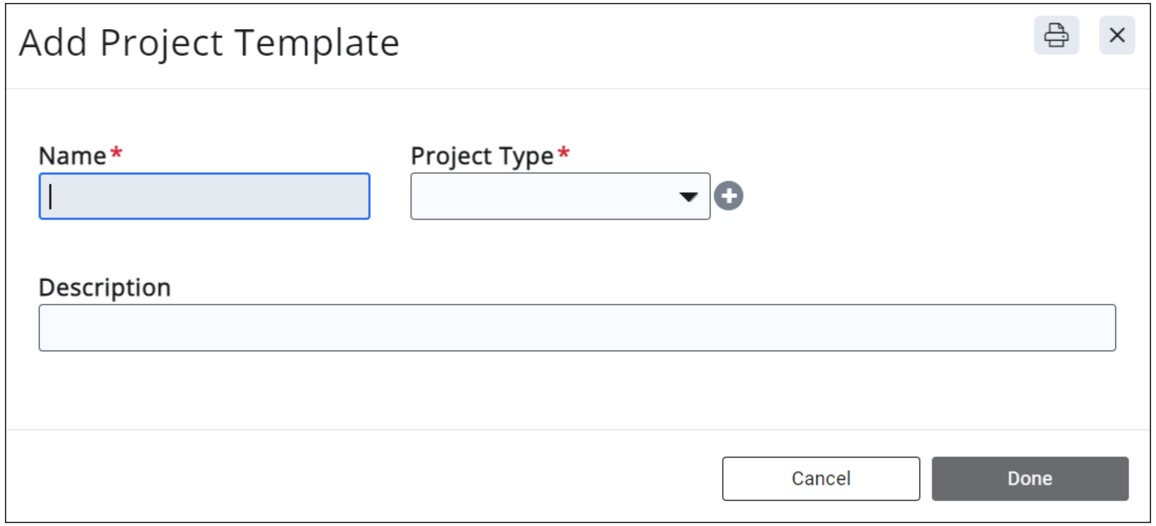
Setup Project Templates

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.



Setup Project Templates

- For Example: Energy Show

  Task – Prep for Exhibitors

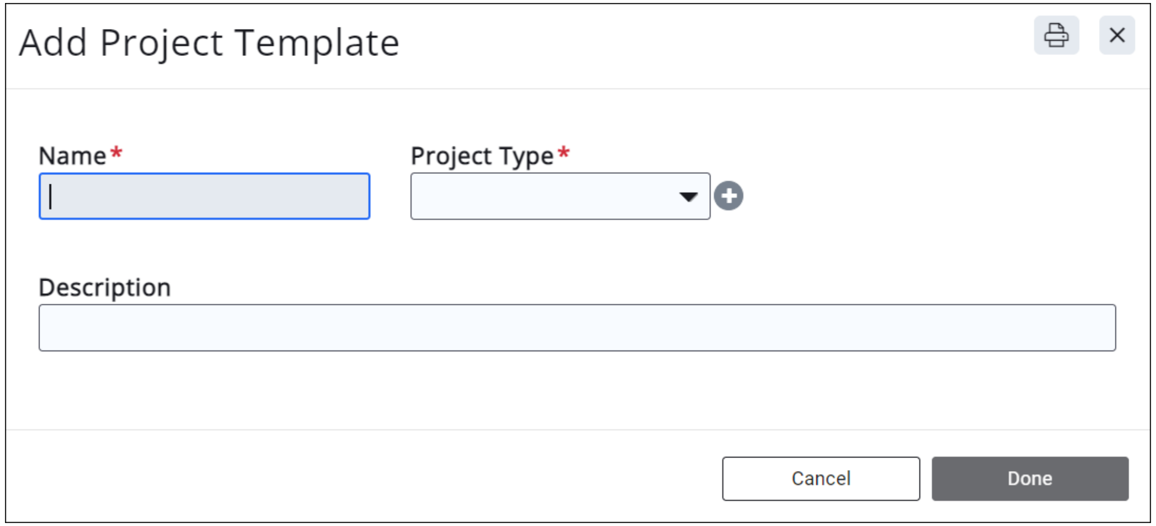
    Sub Items

    - 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:

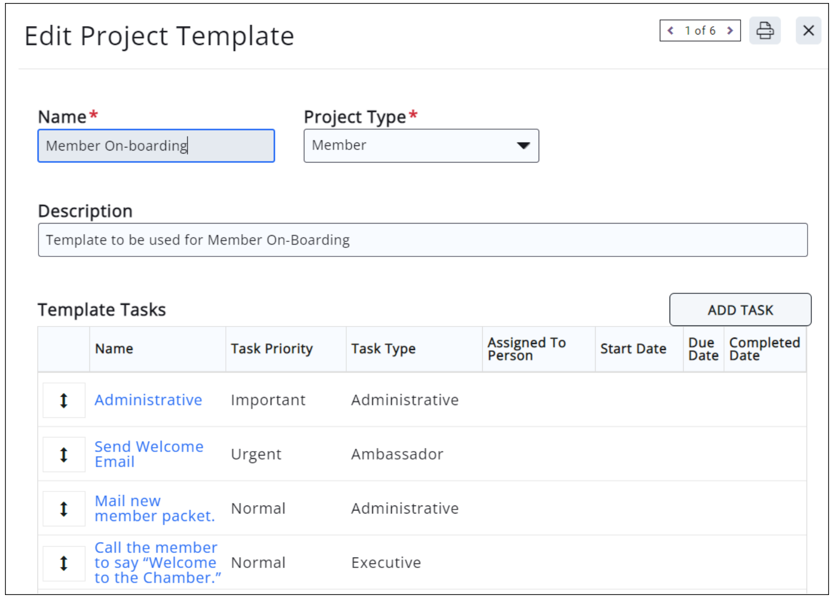
1. Create the template



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.



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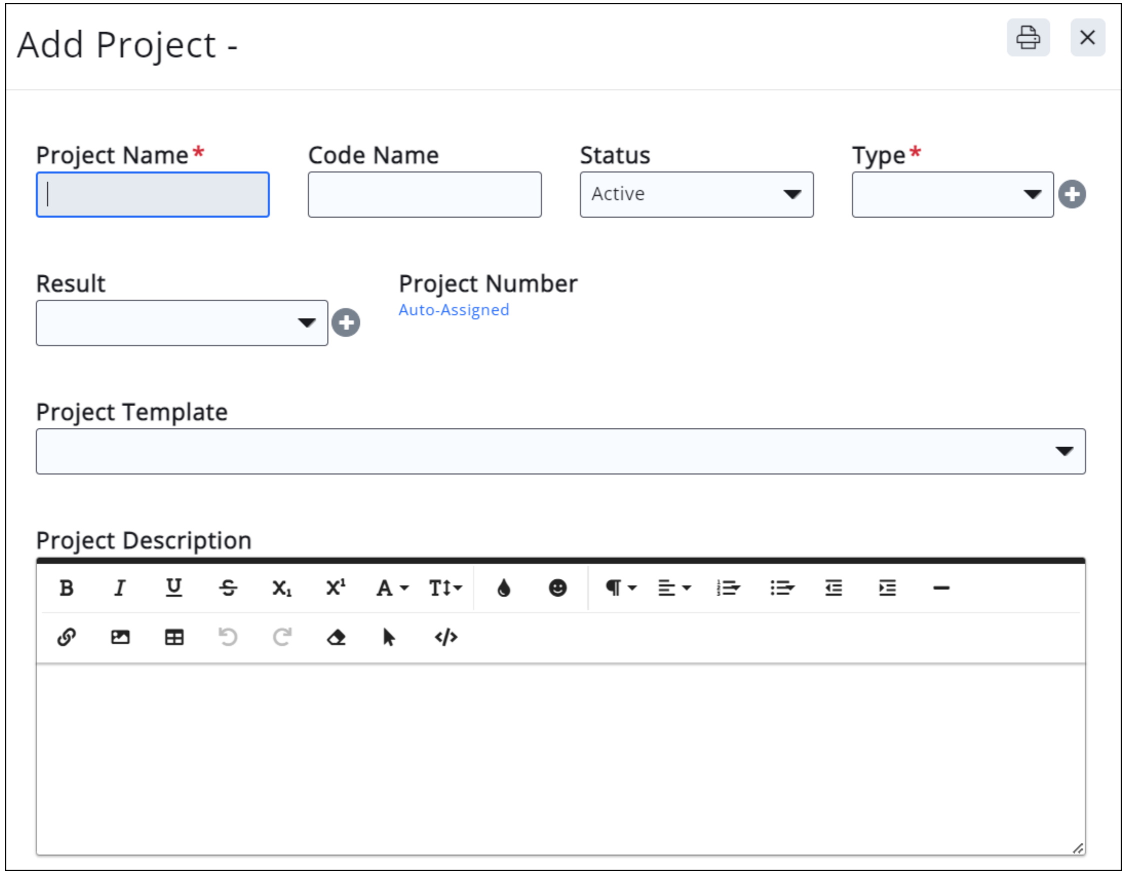
Create a New Project

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

KB: [Create a New Project]



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?

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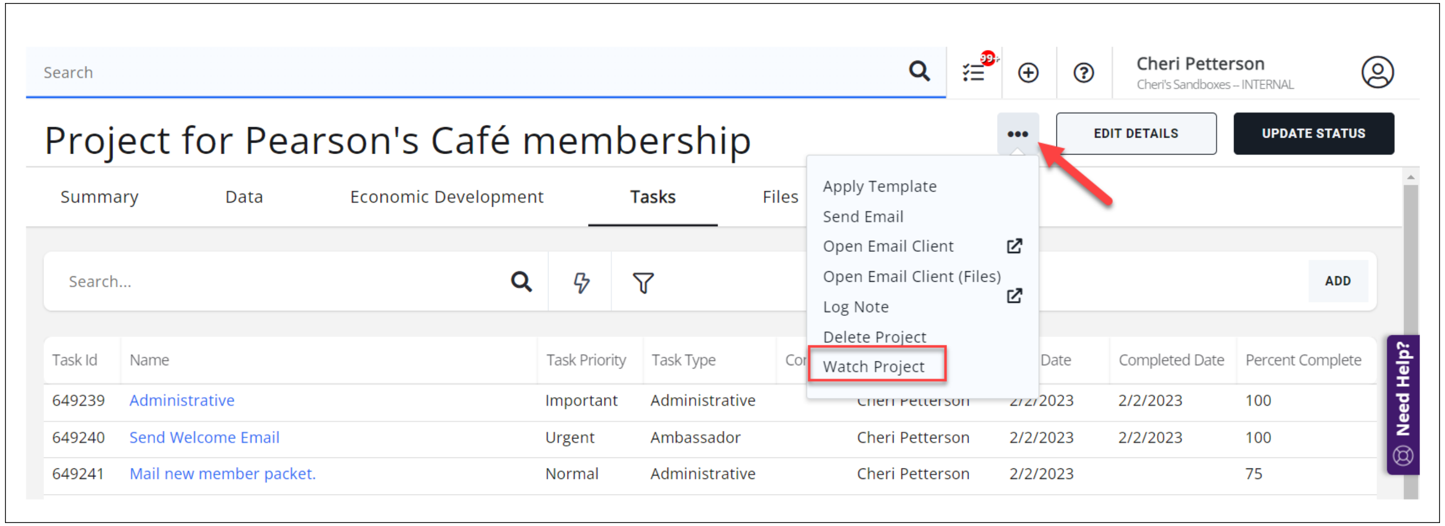
Monitoring & Updating Projects

Watch your projects… be sent eMail notifications when:

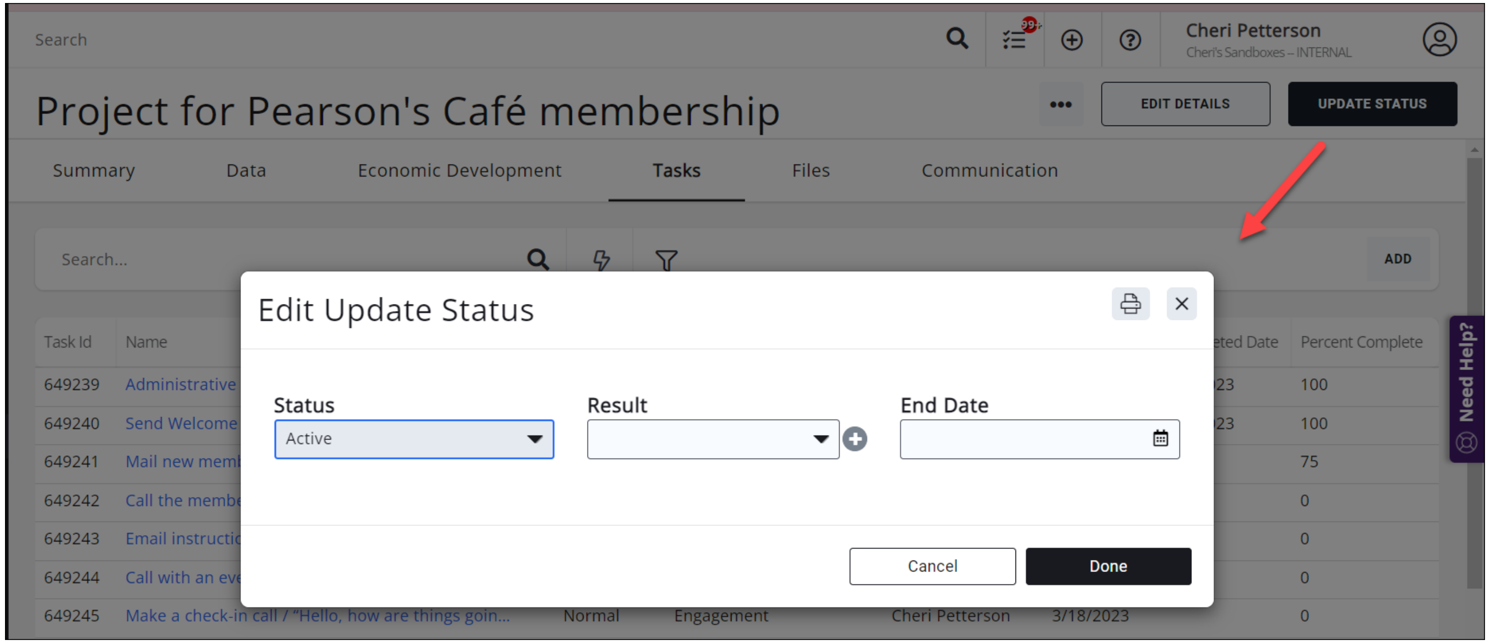
- A project they are watching is completed
- When a task is completed for a project they are watching

KB: [Watch a Project]



Monitoring & Updating Projects

KB: [Update the Status of a Project]



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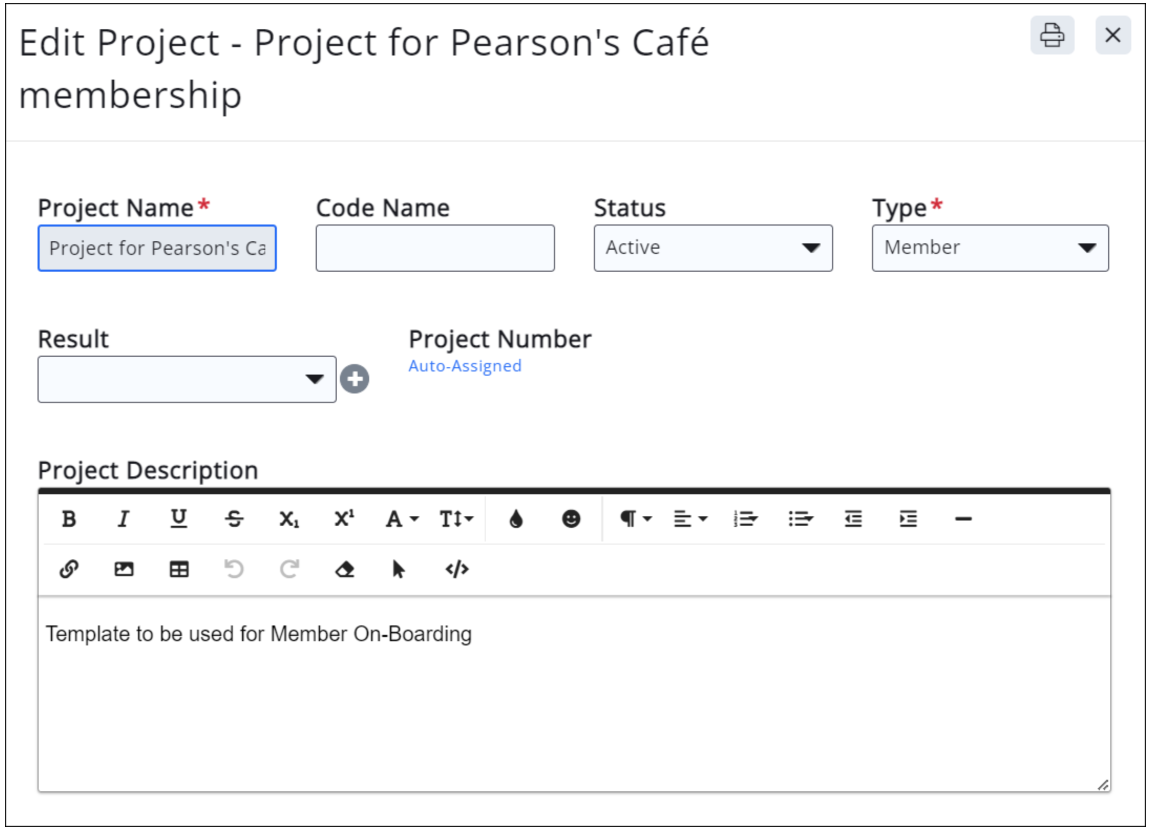
Monitoring & Updating Projects

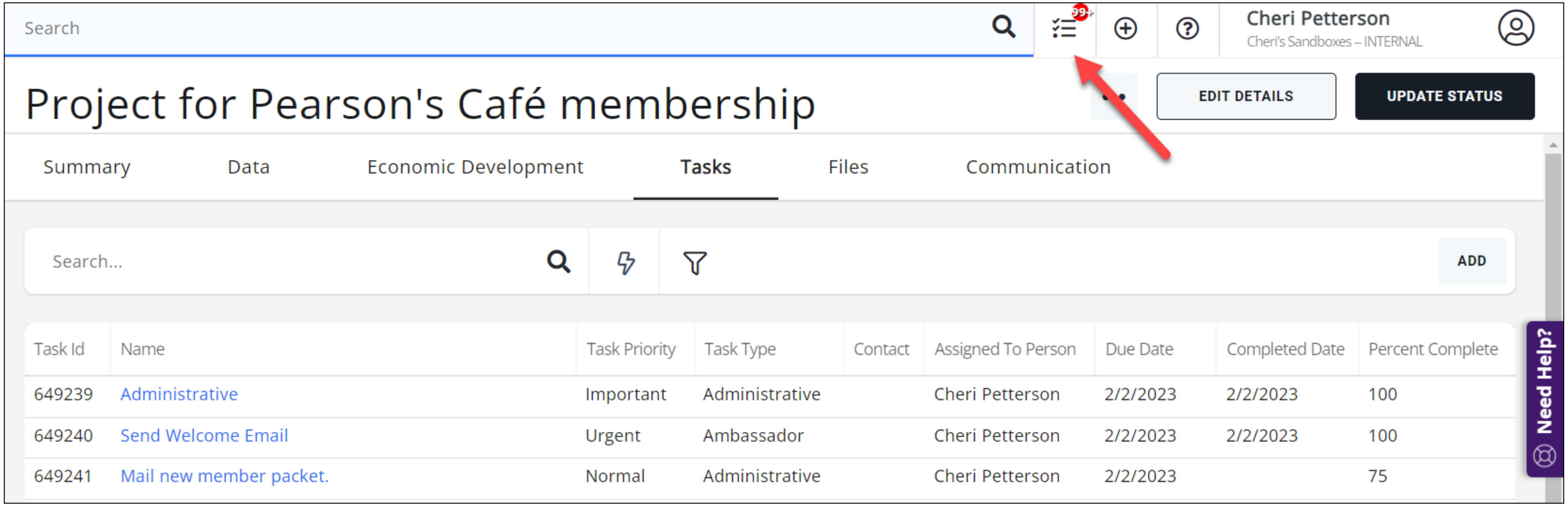
When change is necessary, you can edit project details, such as the description, type, contacts, etc.

- KB: [Edit Project Details]



Monitoring & Updating Projects

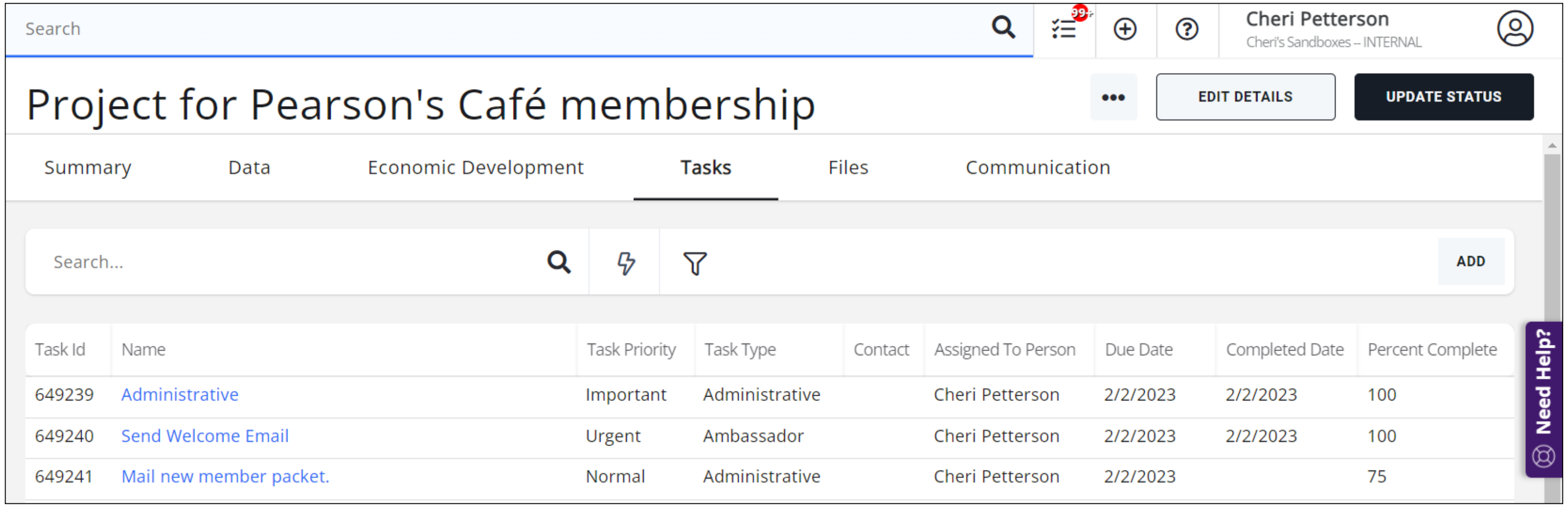
The **Task List** icon in the header bar will notify to a staff member that they have tasks that need attention



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]



Project Reporting

- KB: Projects Report
- KB: Project Started by Quarter
- KB: Project Summary Report
- KB: Task Report

Questions?

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