GrowthZone Classroom Training: Communications & Lists/Committees

EMAIL TEMPLATES

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Email Templates

Benefits of using Email Templates

5 Templates To Customize

- Membership Application Confirmation
- Thank You for Joining
- New Member Access
- Event Registration Confirmation
- Invoice Email

How to Customize Templates

Configure Automated Messaging

Benefits of using email templates

Efficiency

- When you frequently send very similar emails, using templates will save you time in not having to create the same email time over time from scratch. You'll save time and become more efficient at your email tasks

Consistency

- Your members will easily recognize your emails if you use the same template every time

Automation

- To benefit from the automated messaging functions in GrowthZone, you will want to design the emails templates that you wish the system to automatically send for you, for example, the Membership Application submitted email

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5 Templates to Customize

BEST PRACTICE!

GrowthZone has provided you with a multitude of default templates – customize these to suit your needs, rather than starting from scratch.

Within these default templates are many of the merge fields you may need for your communications- making it easier for you to add your association-specific messaging.

Even if a template is not available for a specific need, you can start with one that has done most of the work for you and add additional merge fields and/or custom fields.

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5 Templates to Customize

Tips...

- When using merge fields, determine how you will use the email template: Are you sending an email to an individual, or an organization?
- For Member Communications, the system will always look to the contact information associated to the email address.
- If you are sending communications to an individual, individual contact fields will be pulled into the template
- If you are sending communications to a business/organization email address, contact information would pull from the business

1. Membership Application Confirmation Email

Always confirm that you have received a new member's application!

From	Shelly's DB INTERNAL <info@thearchive.com>
To	Test Subject <test.subject@mailinator.com>
Cc	<Empty>
Bcc	<Empty>
Category	
Date	6/7/2022 1:56 PM

Note/Message

Test Subject

Thank you for filling out our membership application.

View/Print Application

Best regards,

Shelly's DB INTERNAL.

1. Membership Application Confirmation Email

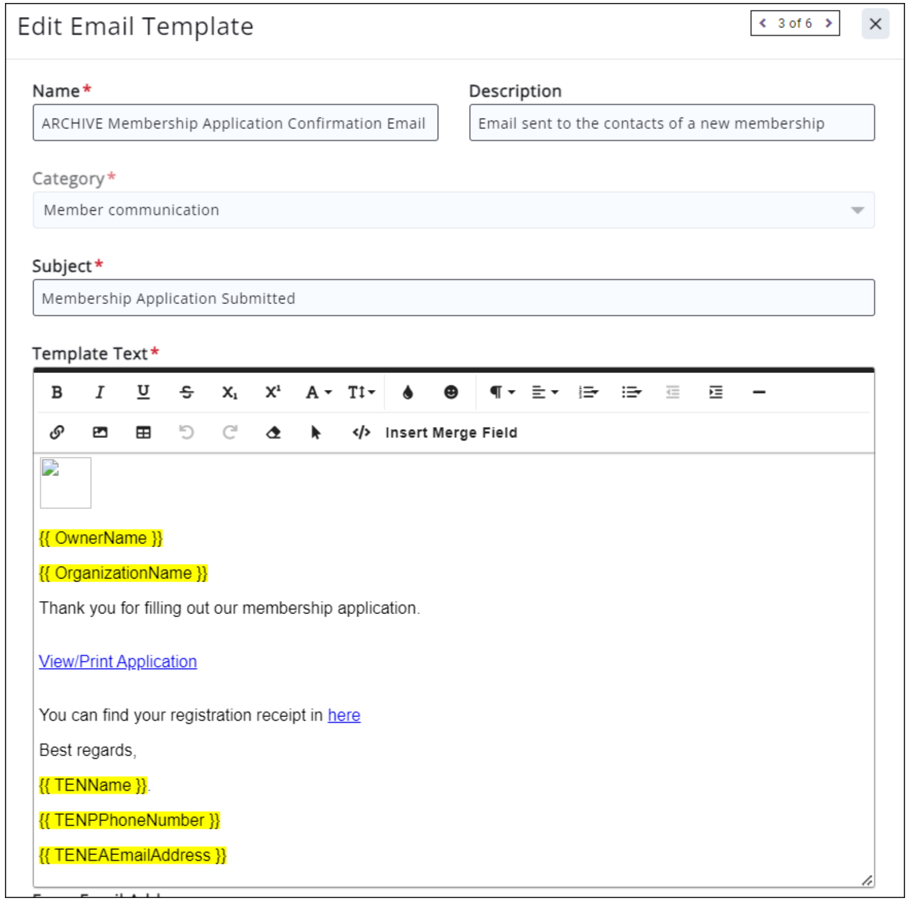
What's already included for you:

- The name of the person purchasing the membership (owner)
- The organization/business of the membership owner
- Ability to view/print the application
- A receipt for online payment
- The name of your organization

1. Membership Application Confirmation Email

Consider:

- Personalized greeting
- Reinforce the great decision they have made to apply
- Next steps
- Upcoming Events



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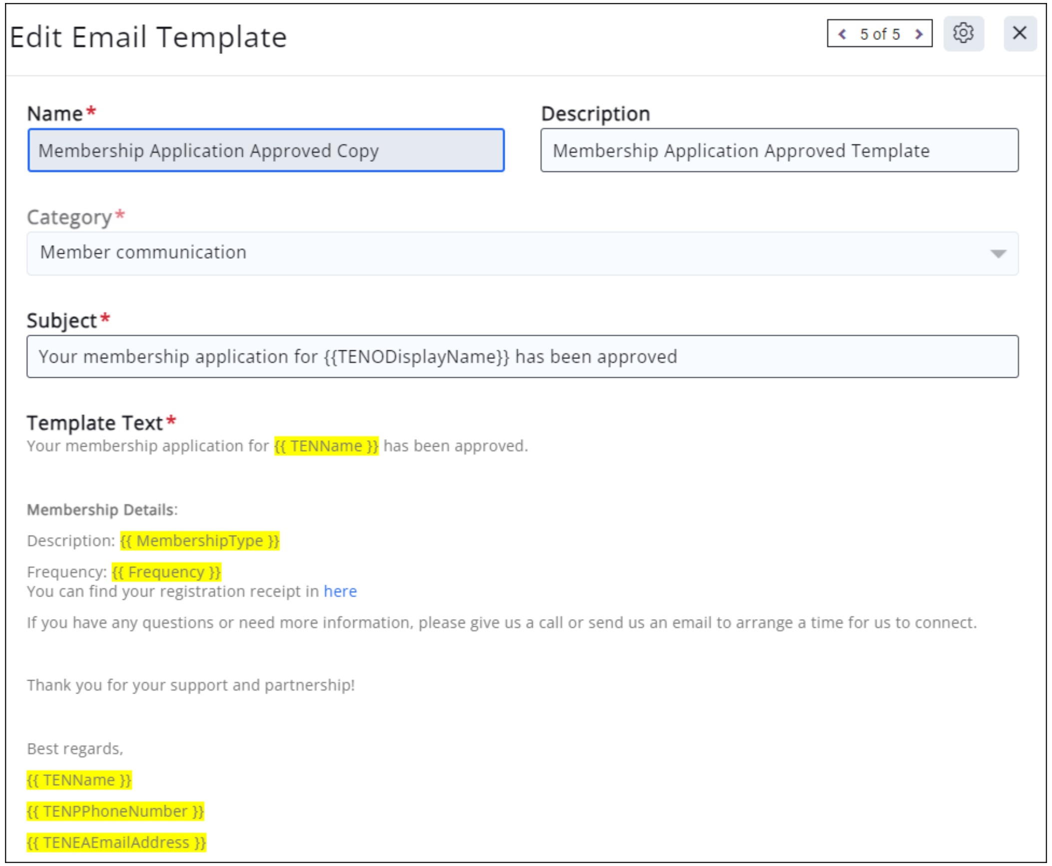
2. Membership Application Approved

This email is sent once you approve a membership application in the back office.

See our tips on creating your welcome email!

[How to Write a Welcome Email for New Members]()



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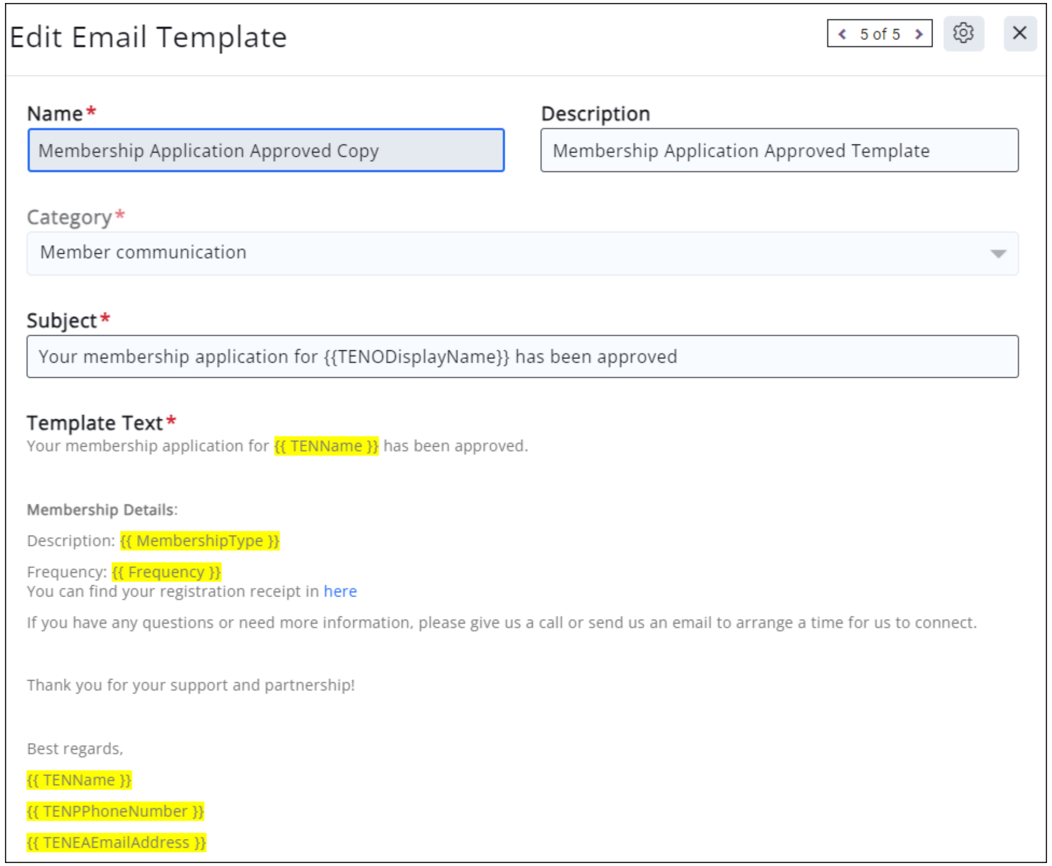
2. Membership Application Approved

When is it sent:

- This email is automatically sent once you approve an application

What's already included:

- The name of your association
- The membership that was approved
- The frequency at which the membership will renew



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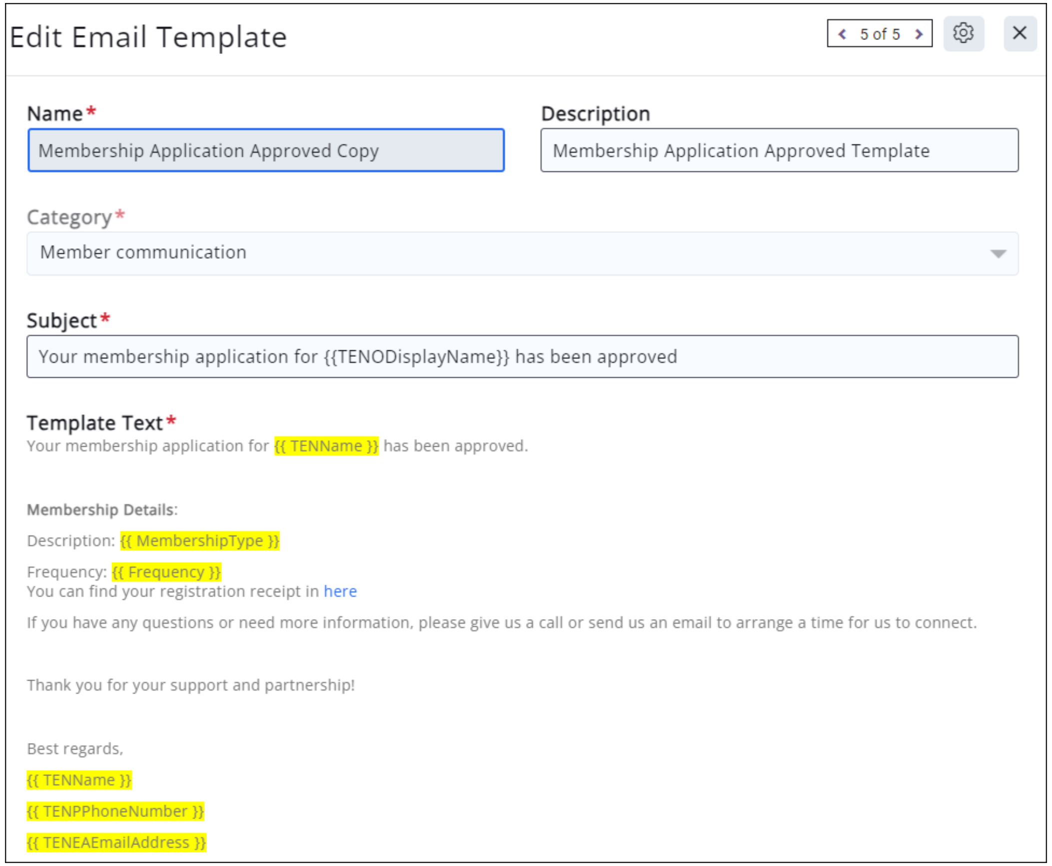
2. Membership Application Approved

Consider:

- Personalized greeting
- Reinforce the great decision they have made to join
- Next steps
- Upcoming Events



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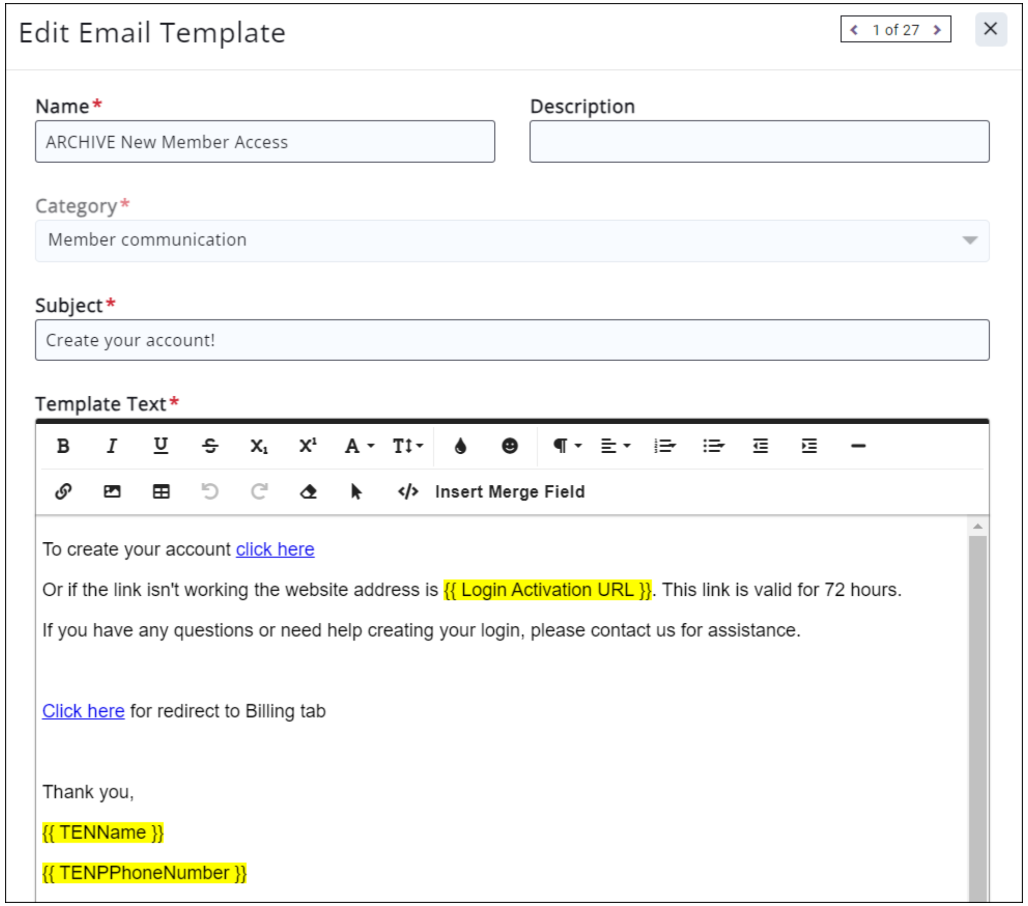
3. New Member Access

One of the benefits for your members is access to the Info Hub, your members-only portal.

This email is a great way to not only encourage your members to set up their credentials, but also encourages them to update their directory information, take advantage of web content options, and more.

This email is the default in your system, so it's important to review and ensure it is the message your association wishes to send.



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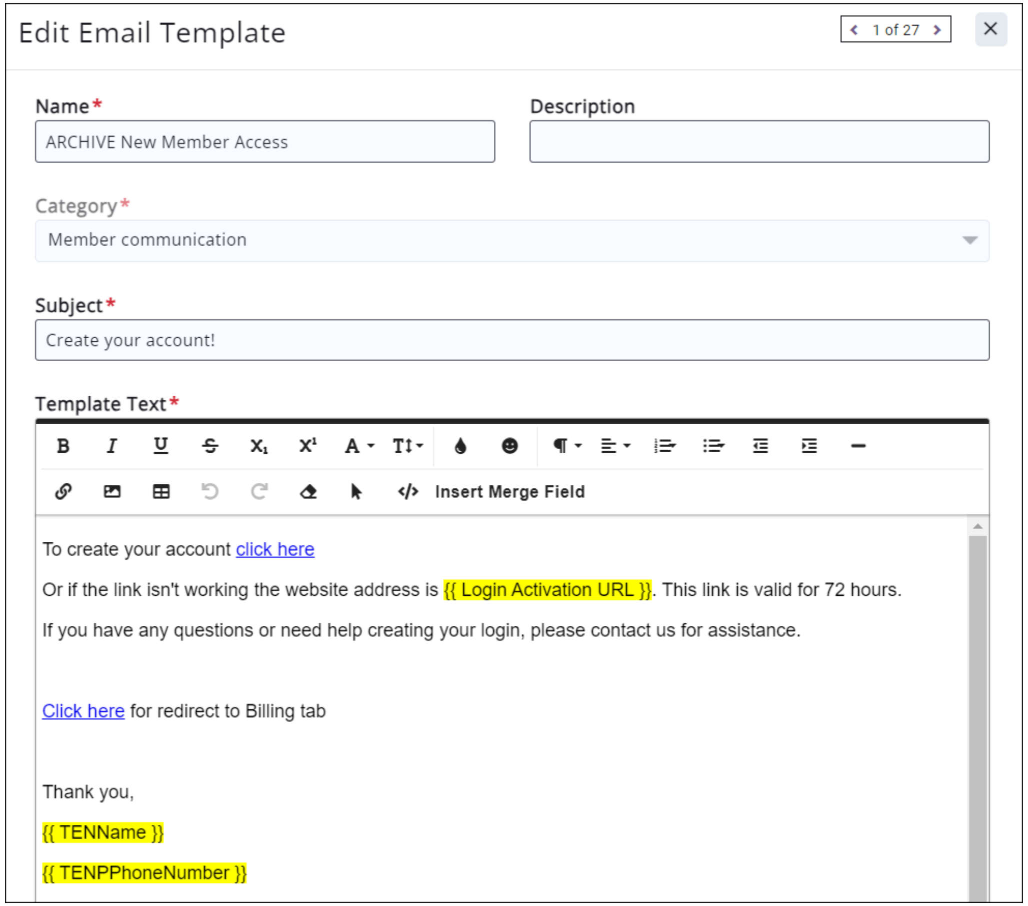
3. New Member Access

When is this sent?

- When using the function to send login instructions to a member, this is the email that will be sent

What's already included for you:

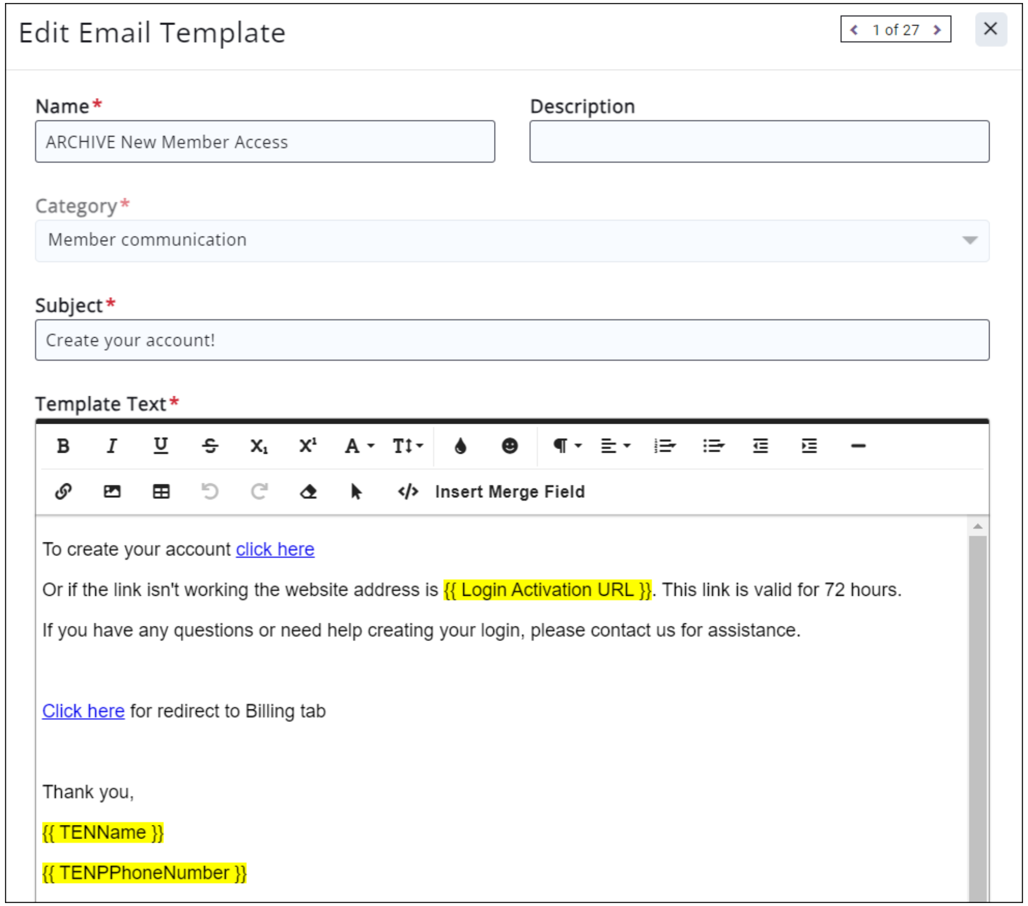
- A link to create an account
- Your association/chamber name



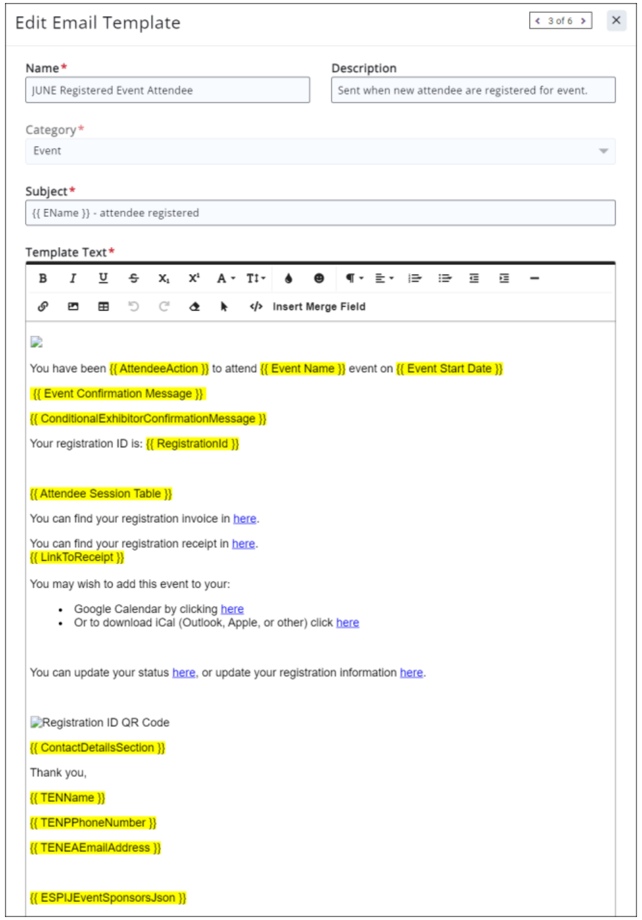
3. New Member Access

Consider:

- A link to the Info Hub tour video
- Adding links to How To videos, found in our Knowledge Base: Training for Your Members
- Recommendations on updating their Directory Listing(s).
- Information on opportunities you offer, such as hot deals, job postings, etc.
- If using the forum, encourage your new member to participate



4. Event Registration Confirmation



An event confirmation email should be sent confirming for the attendee that their registration has been received.

It should also provide important details regarding the **event**: date, time, place, etc.

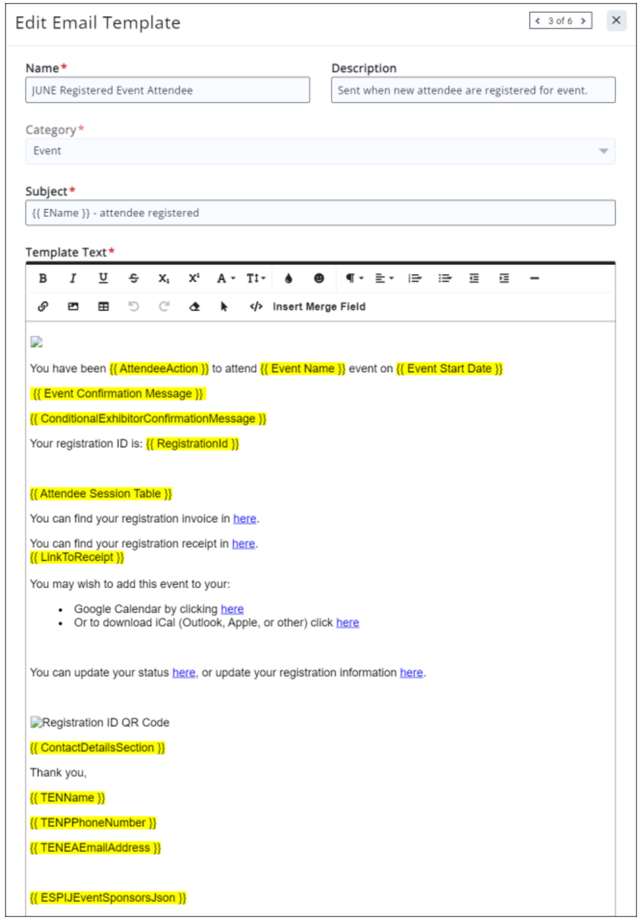
When is this email sent?

- If set under your Automated Messaging. this email is sent to event registrants when they complete event registration

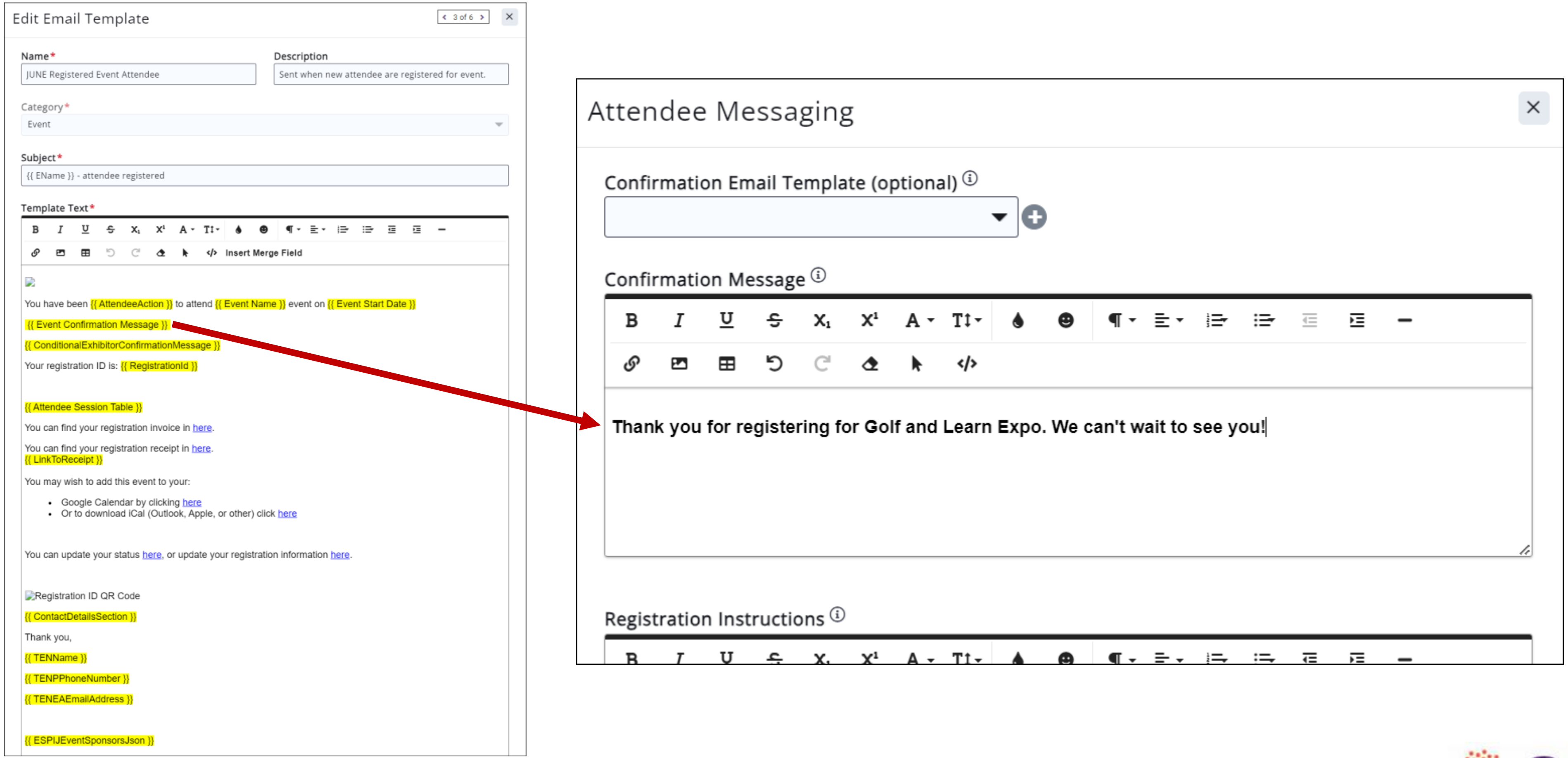
4. Event Registration Confirmation

What's already included for you:

- Event details
- Attendee Status
- Event specific confirmation message
- Exhibitor confirmation details
- Invoice or receipt
- Add to calendar option
- Update registration option
- Registration QR Code
- Event Contact Details
- Your organization information
- Sponsors if applicable



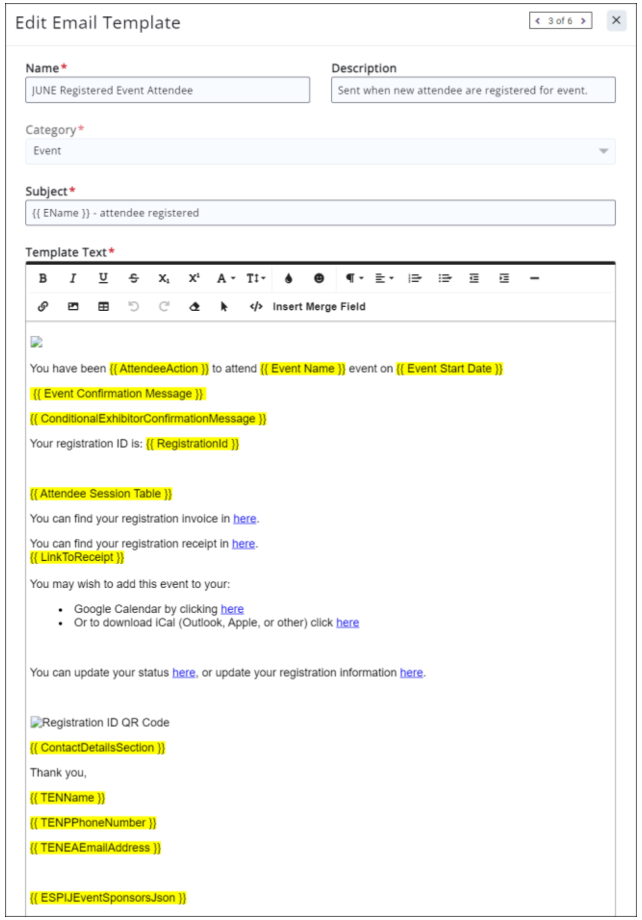
4. Event Registration Confirmation



4. Event Registration Confirmation

Consider

- This template is used for ALL events, so ensure that the customization is not event specific
- At the event level, you can also configure a custom email confirmation FOR THAT EVENT ONLY
- If you are not using the staff app for check-in, you may wish to remove the QR code. If you are using the staff app you may wish to provide information around the use of the QR code
- Change the subject to add zing!
- Call out your Sponsors (i.e. don't remove the merge field!)



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Other event emails you should review

Event Reminder Template

Event Waiting List Automated Message

Unregistered Event Attendee

Registered Exhibitor

Event Postponement Notice

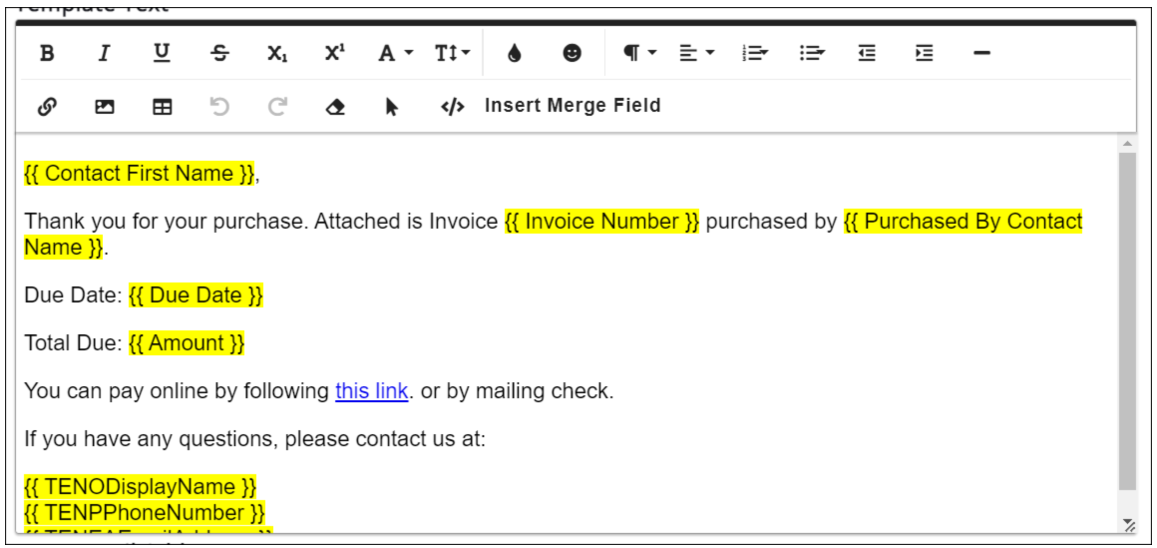
Event Cancelation Notice

5. Invoice Email

You can select this template when sending out renewal invoices in bulk, or if you are sending a single invoice to deliver.

What is already included:

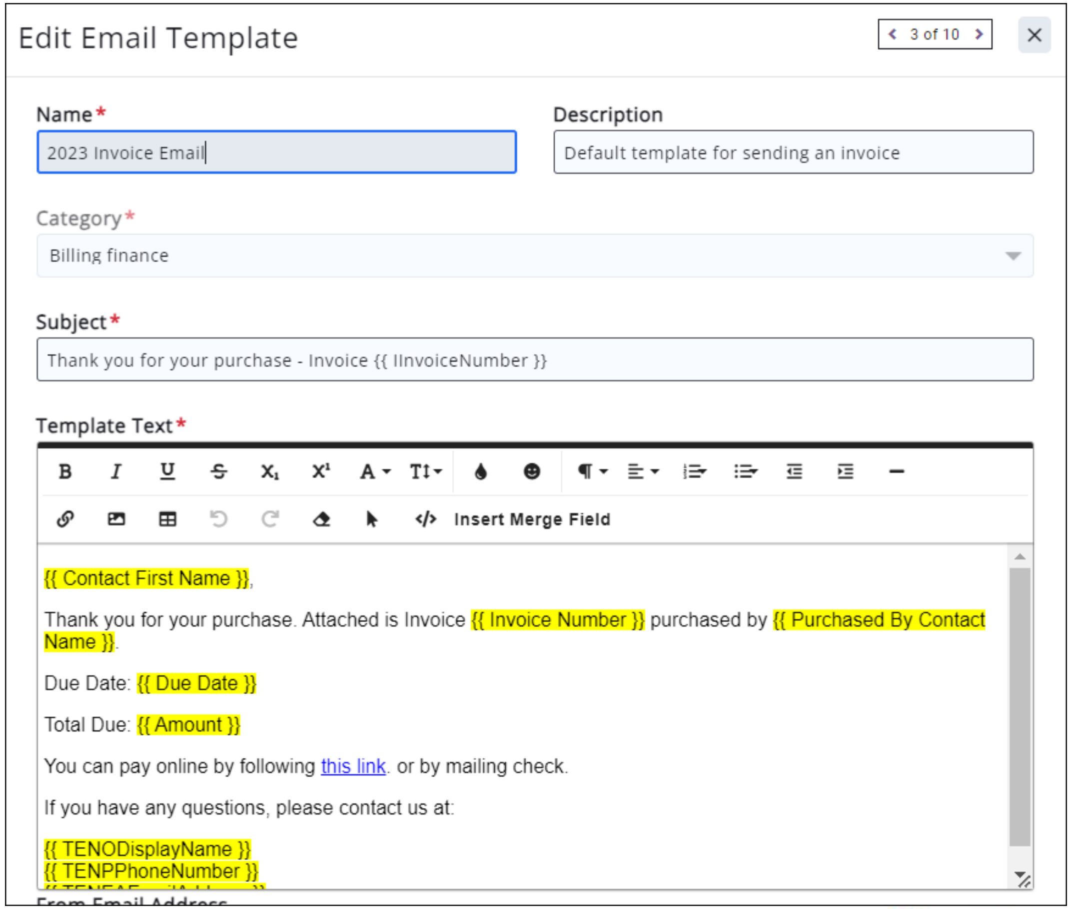
- Subject line includes invoice number
- Invoice # and purchased by
- Due Date
- Total Due
- Link to access the info hub.



5. Invoice Email

Consider:

- Updated formatting
- Adding additional information about the association
- Any deductibility statements
- Late fee information



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Other billing/finance templates to review

Auto Payment Receipt

If you have auto-charge setup, this email is sent when a credit card or ACH is automatically charged

Member Invoice Payment Received

Member Invoice Payment Received – when staff processes a payment via the back office, an option to send a payment receipt is available

Sale Payment Receipt

If you are using the store module, when a purchase is made on-line, by credit card, this email is sent

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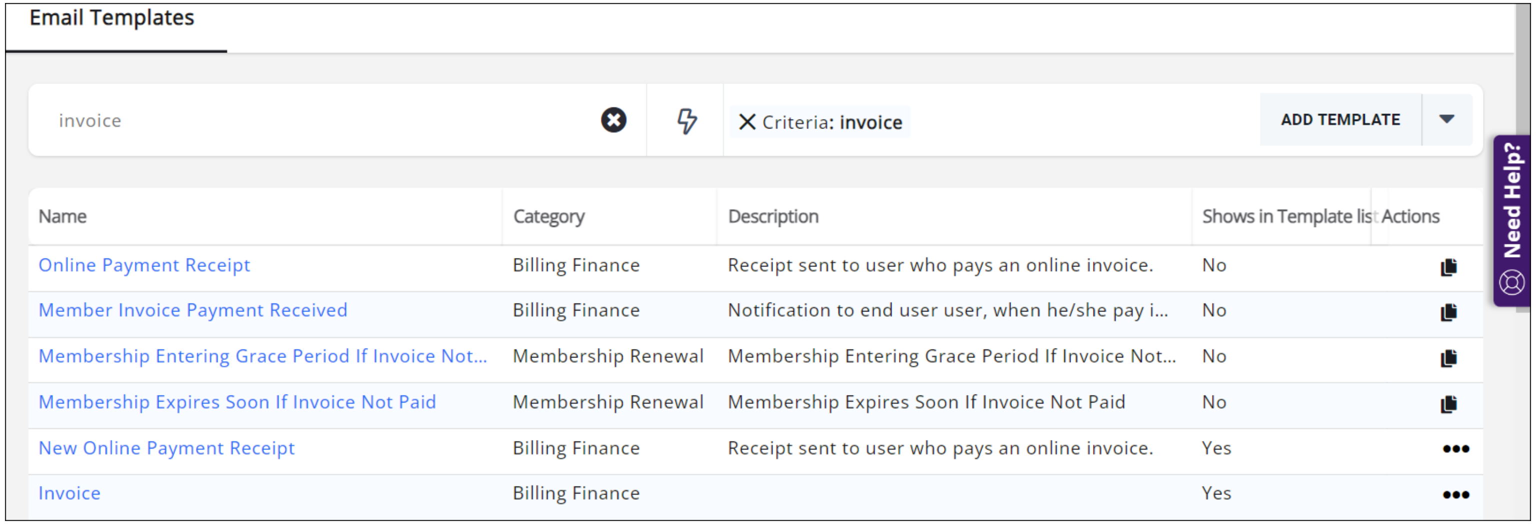
How To:

Make a Copy/Edit a Default Template

- Rename the copy!
- Subject Line
- Edit your Content
- Add Merge Fields



Name	Category	Description	Shows in Template lis	Actions
Online Payment Receipt	Billing Finance	Receipt sent to user who pays an online invoice.	No	
Member Invoice Payment Received	Billing Finance	Notification to end user user, when he/she pay i...	No	
Membership Entering Grace Period If Invoice Not...	Membership Renewal	Membership Entering Grace Period If Invoice Not...	No	
Membership Expires Soon If Invoice Not Paid	Membership Renewal	Membership Expires Soon If Invoice Not Paid	No	
New Online Payment Receipt	Billing Finance	Receipt sent to user who pays an online invoice.	Yes	•••
Invoice	Billing Finance		Yes	•••

Article: [Create and Manage Email Templates]

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Merge Fields

When working with merge fields it is important to recognize who the email is being sent to!

- When sending to an individual, for example, fields such as Primary Business are appropriate, but Primary Contact (of an individual) is not, being as an individual can BE a Primary Contact but cannot HAVE a Primary Contact.
- And vice versa- if you are sending an email to a business, Primary Contact would be a valid field, whereas Primary Business would not; a business can BE a Primary Business, but cannot HAVE a primary business

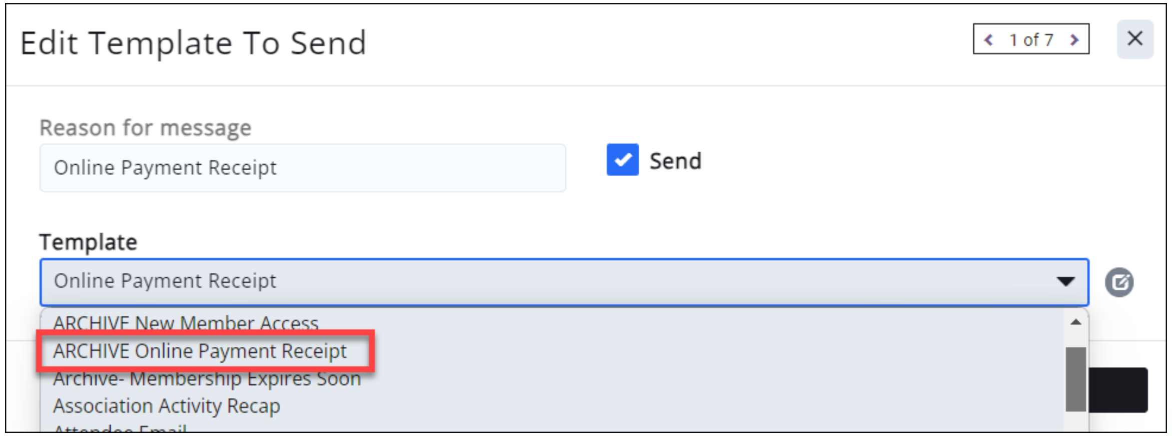
Automated Messaging

Many emails can be automatically sent, without any interaction on your part and for some, a default message has been configured

If you are editing email templates that you wish to be sent automatically, you **MUST** make the appropriate change under **Setup > Communications > Automated Messaging**

For Example: As the Online Payment Receipt is only sent out automatically, if you have customized the template, make the needed change in Automated Messaging.

Article: [Automated Messaging]



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EMAIL DESIGNER

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Email Designer Overview

Included with your Marketing Automation module, **Email Designer** provides you the ability to create and design newsletters and email templates.

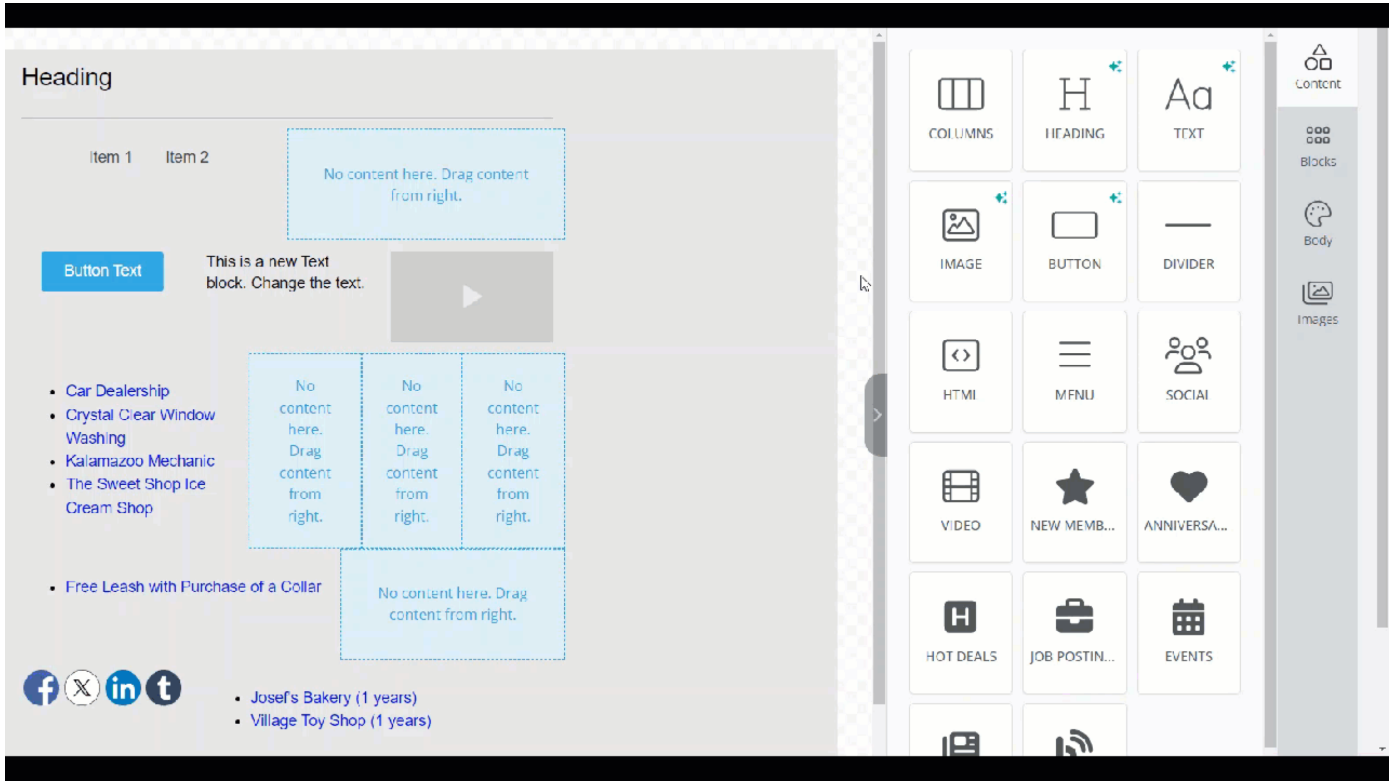
Email Designer is extremely flexible and provides a variety of tools for content elements that populate from your database.

How Does It Work?

Email Designer is a drag-and-drop, “What You See Is What You Get” (WYSIWYG) email editor.

To use it, click and hold the tool you want to use and drag it into the spot you want the content to appear.

It’s that simple!



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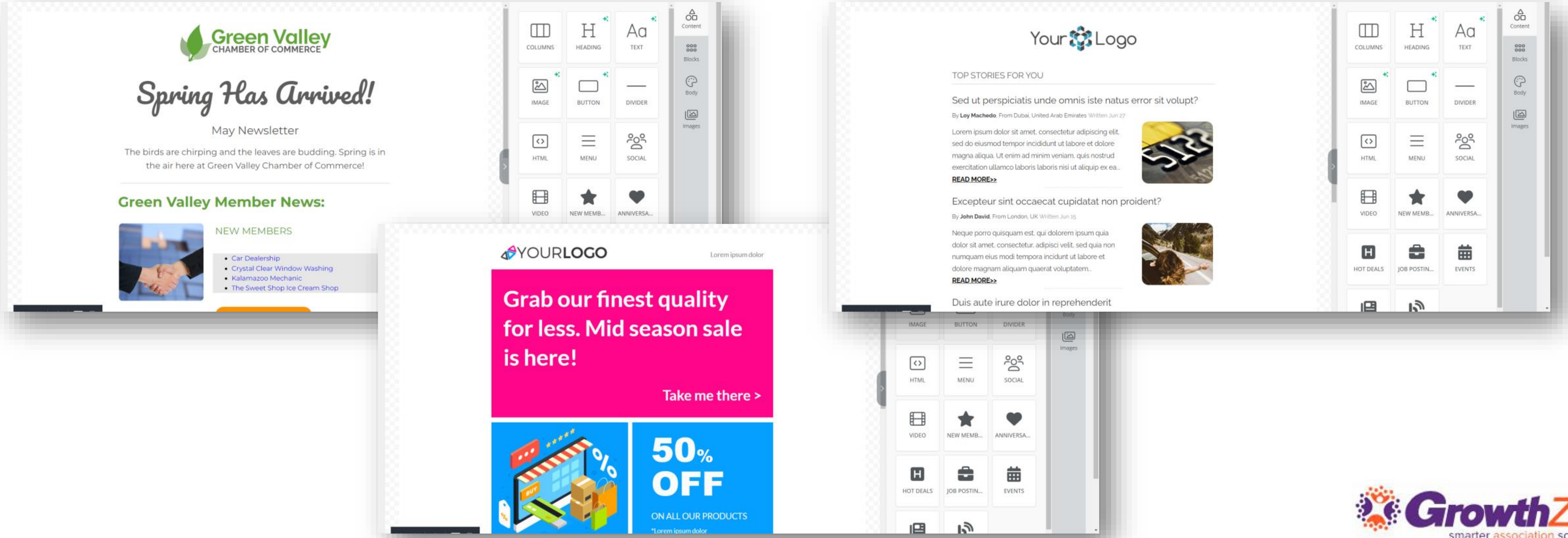
Default Templates

There are several Default Templates you can view and customize.



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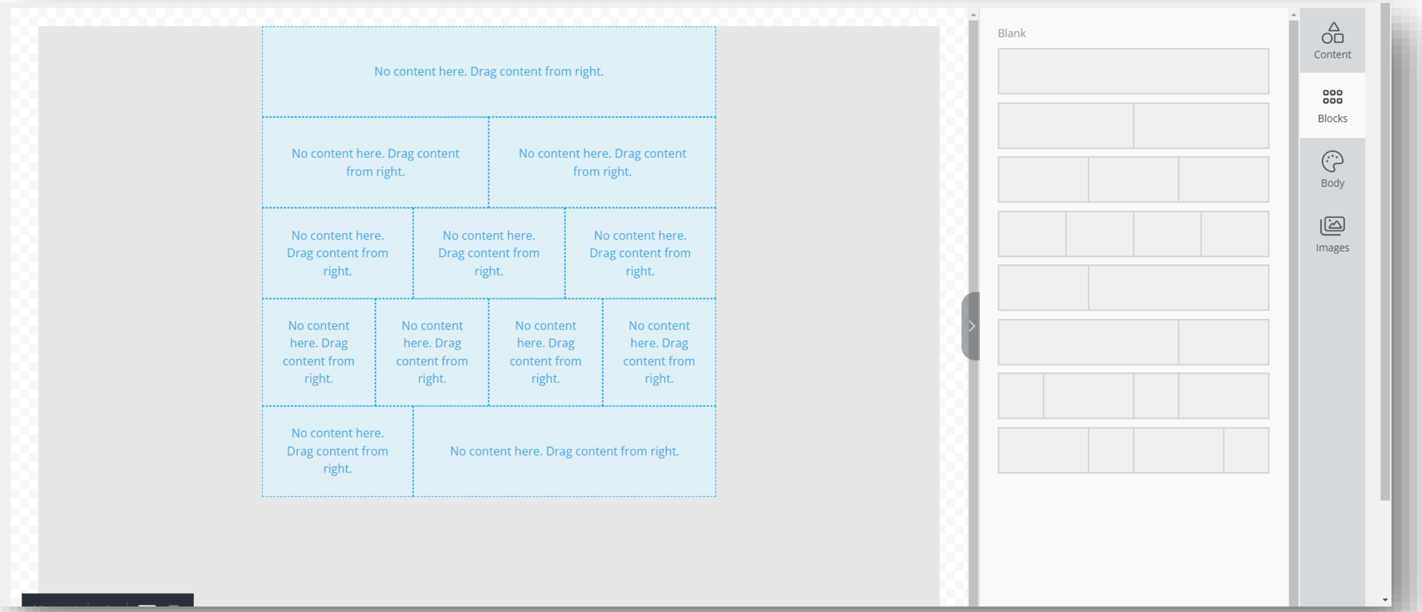
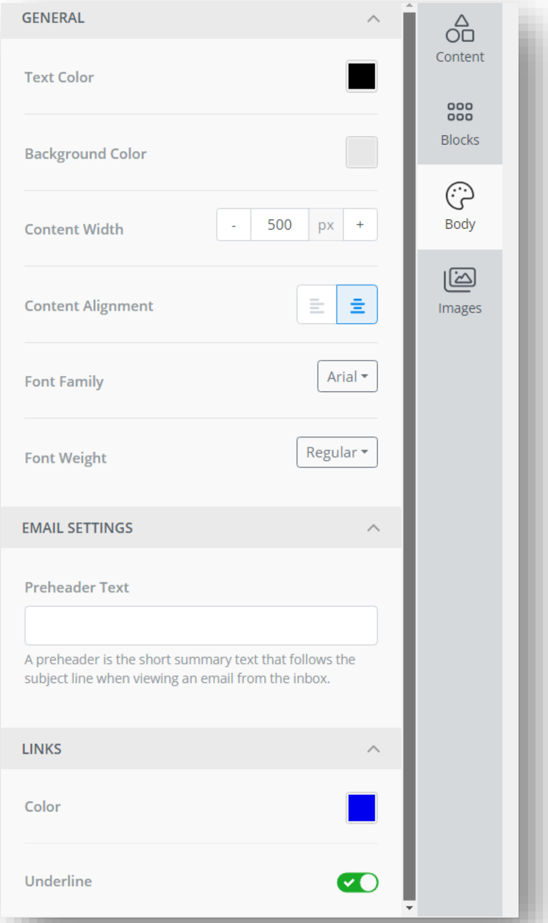
Template Settings

Blocks

Blocks help you define the areas of your template and can divide them into sections; each Block can contain multiple types of content.



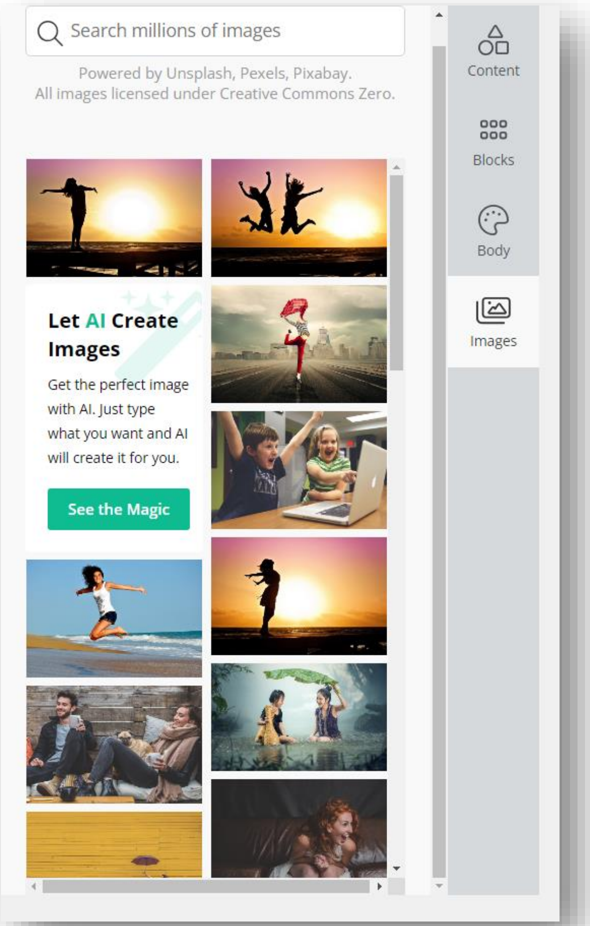
Template Settings



Body

Using the **Body** option, you can define the global settings for your templates, including the width of the template, the background color, default fonts to be used, link color, etc.

Template Settings



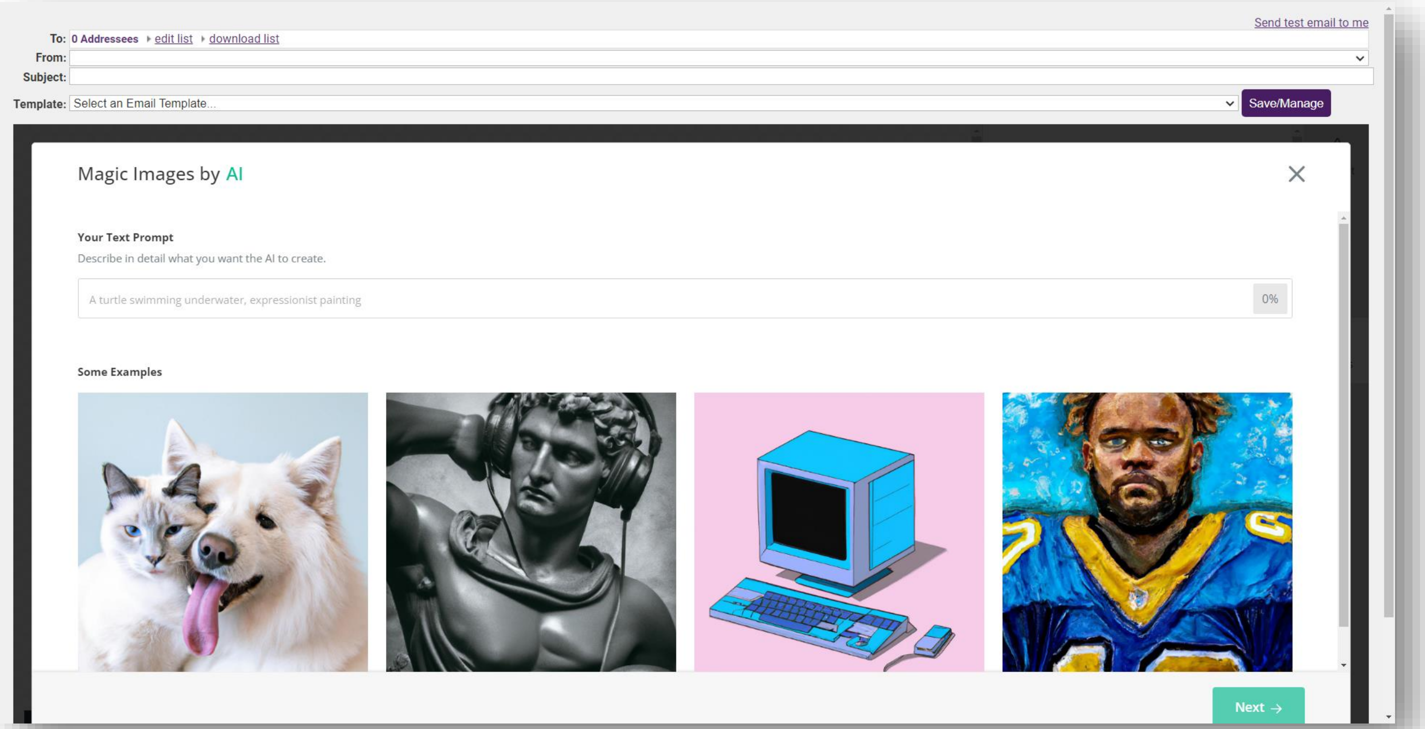
Images

Search and select from an extensive library of Creative Commons stock images

Template Settings

NEW! AI-Created Images!

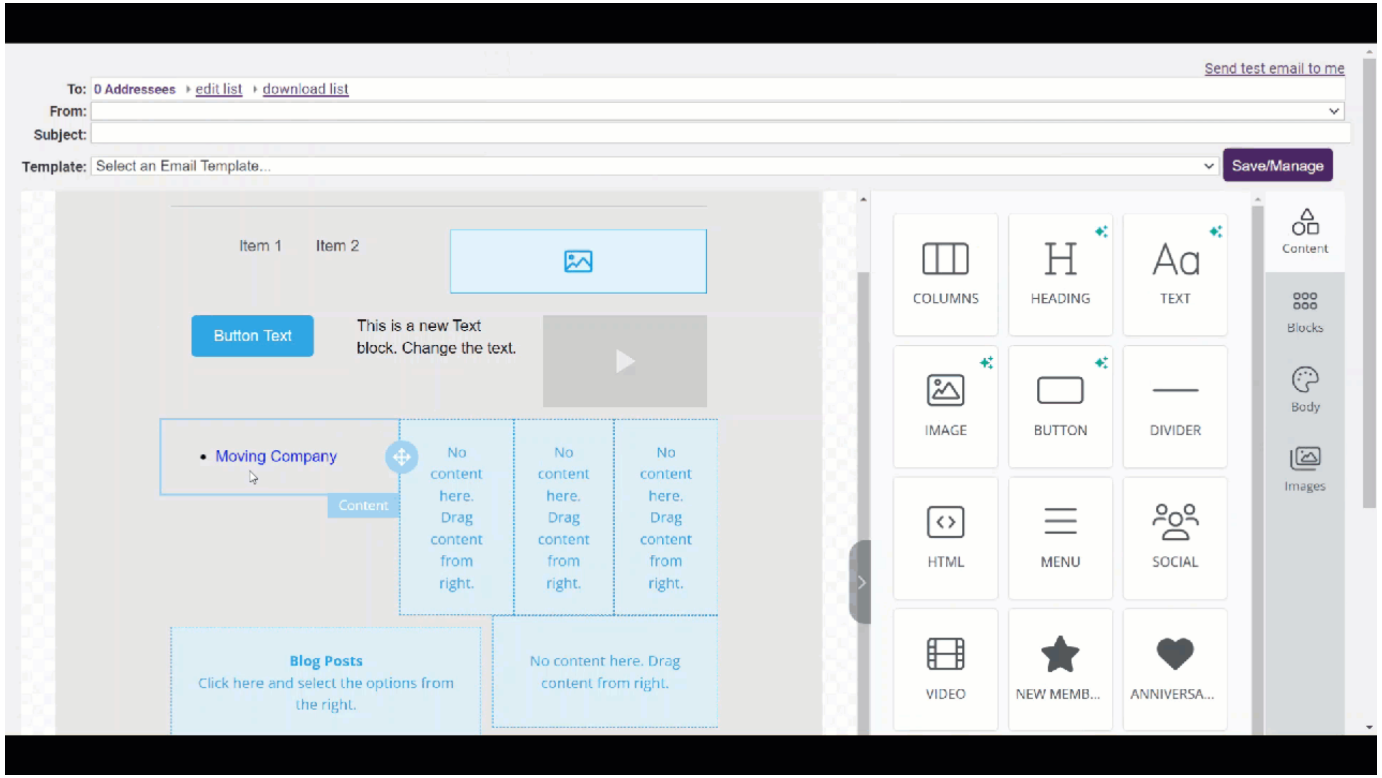
Use the **Magic Images by AI** option to create any image you need.



How Does It Work?

Updating Content

When working with content from your database, keep in mind it does not update automatically- for current lists of new members, upcoming events, etc., be sure to **Reload Content** before sending out your newsletter!



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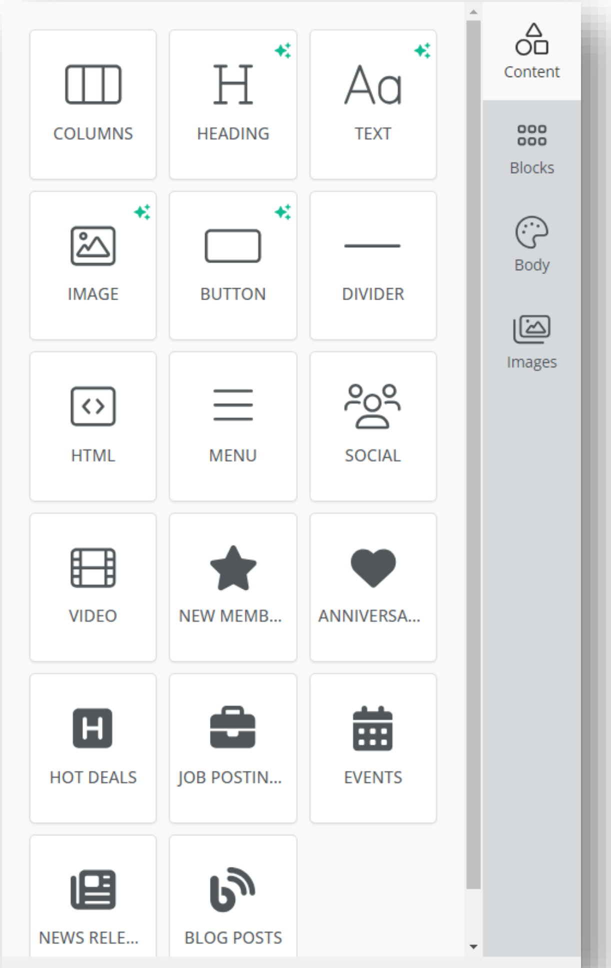
Content Tools

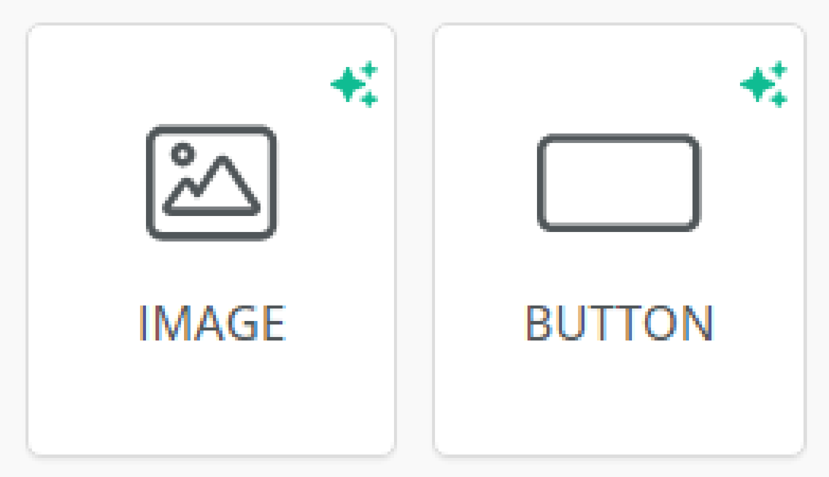


On the Content tab are both standard and custom tools you can use to edit existing content or add new content.

Content Tools

AI functions are now included throughout Email Designer.

Hint: look for the little green sparkles!

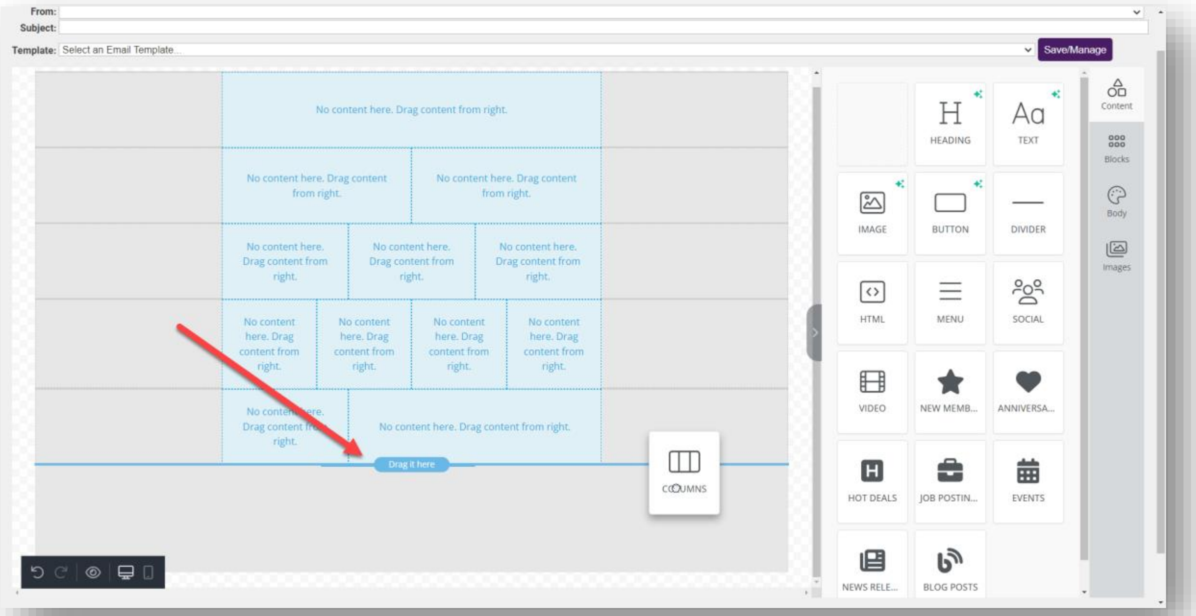


STANDARD TOOLS

Standard Tools

Columns

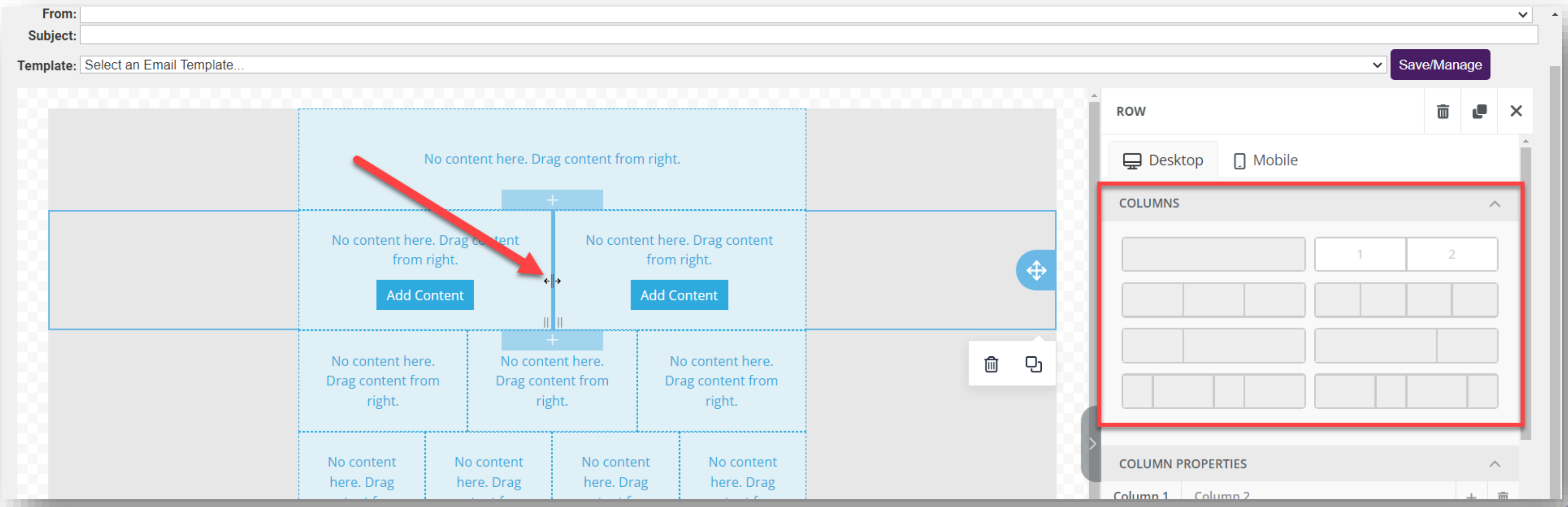
This is essentially the same tool as the **Blocks** option. Click and hold the Columns button, and drag it into place.



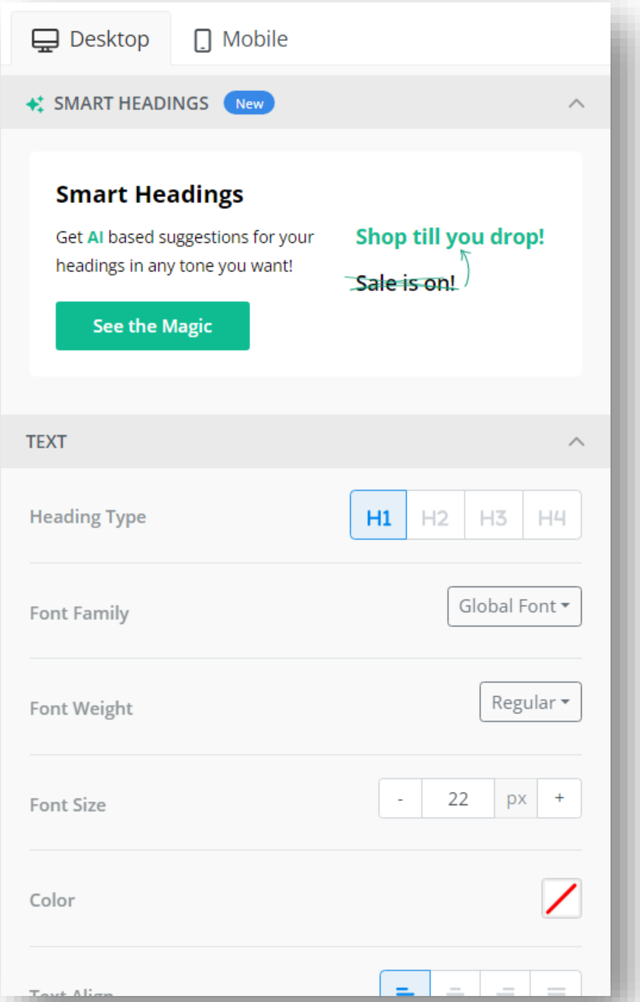
Standard Tools

Columns

Select the configuration of the row of editable content areas you want, and drag the dividers around to further customize the content areas.



Standard Tools



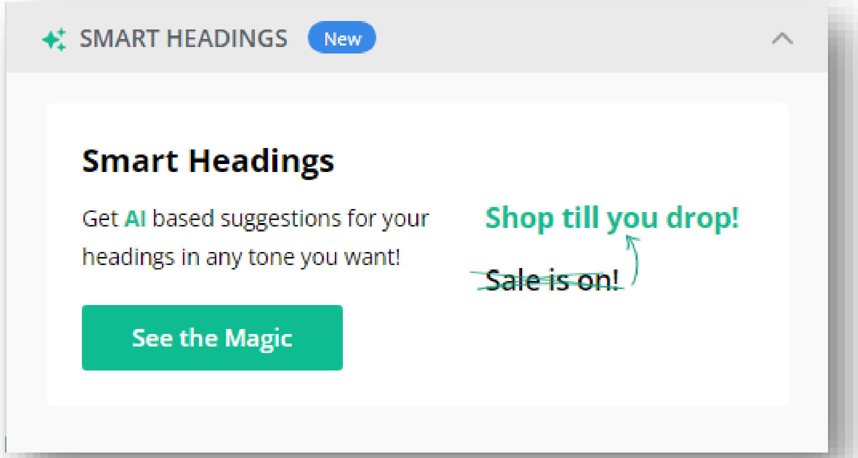
Heading

This will drop a text box with preconfigured Heading options into place.

Standard Tools

NEW! Smart Headings!

Get AI based suggestions for your headings!



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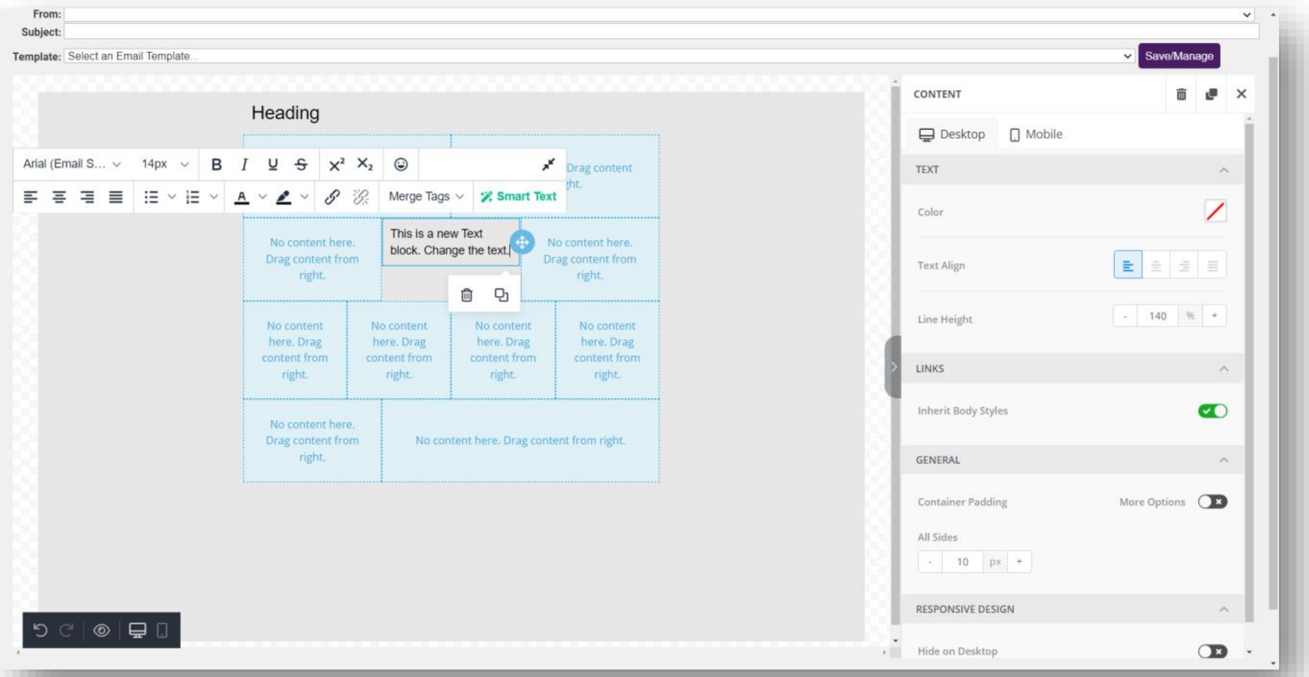
Standard Tools

Text

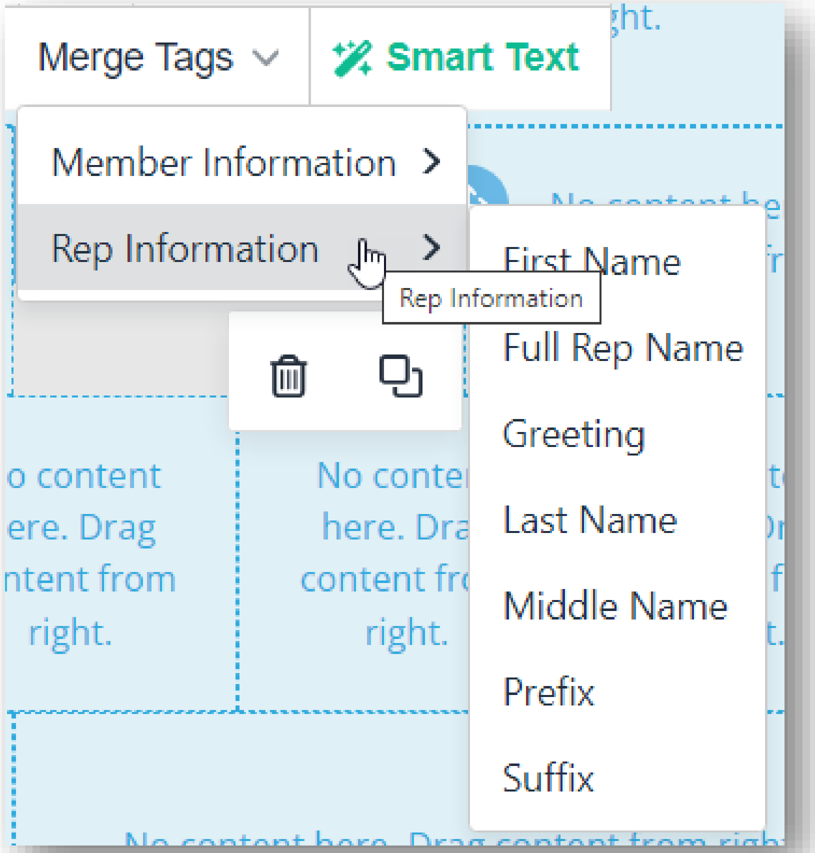
The Text tool allows you to add the text block to your newsletter. Standard word processing functions are available.



Standard Tools

Merge Tags

Use Merge Tags to populate text areas with ChamberMaster data such as Member Name and Rep Information.



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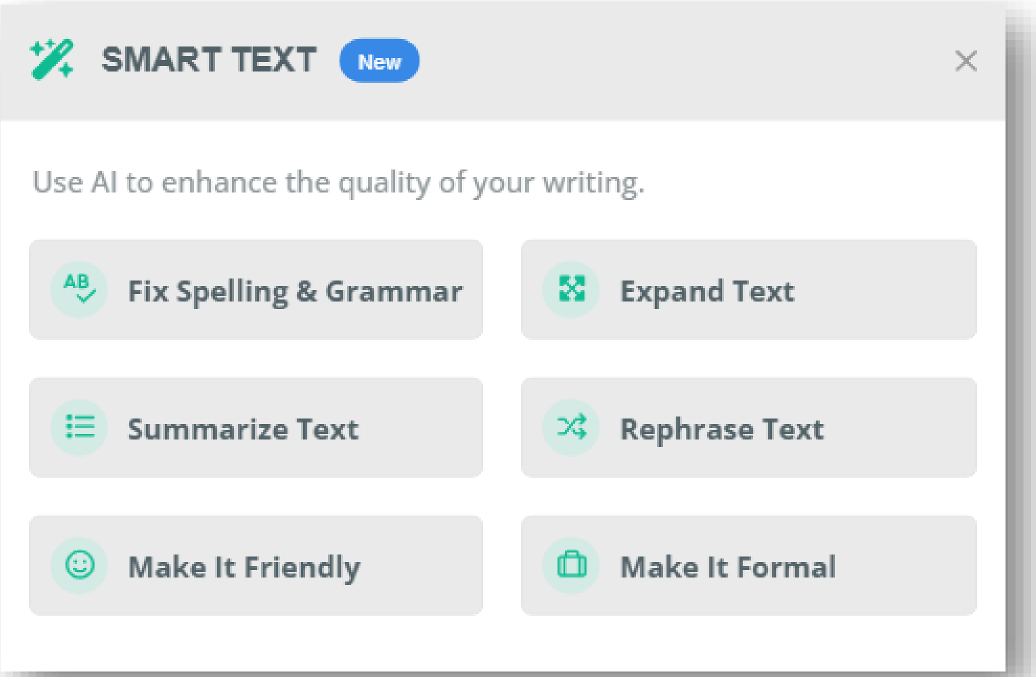
Standard Tools

NEW! Smart Text!

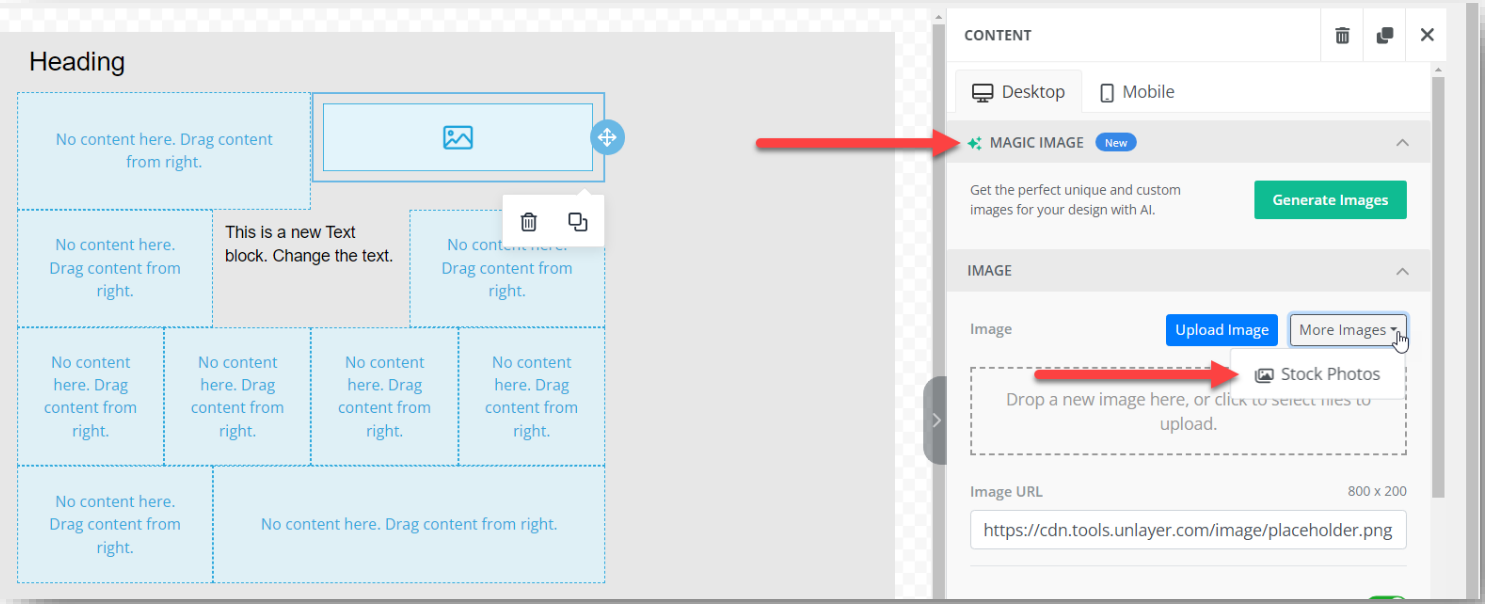
Use AI to enhance the quality of your writing.



Standard Tools

Image

To insert images into your newsletter, drag and drop the Image Tool into one of your content areas. Upload an existing image or access the AI option or Stock photos.



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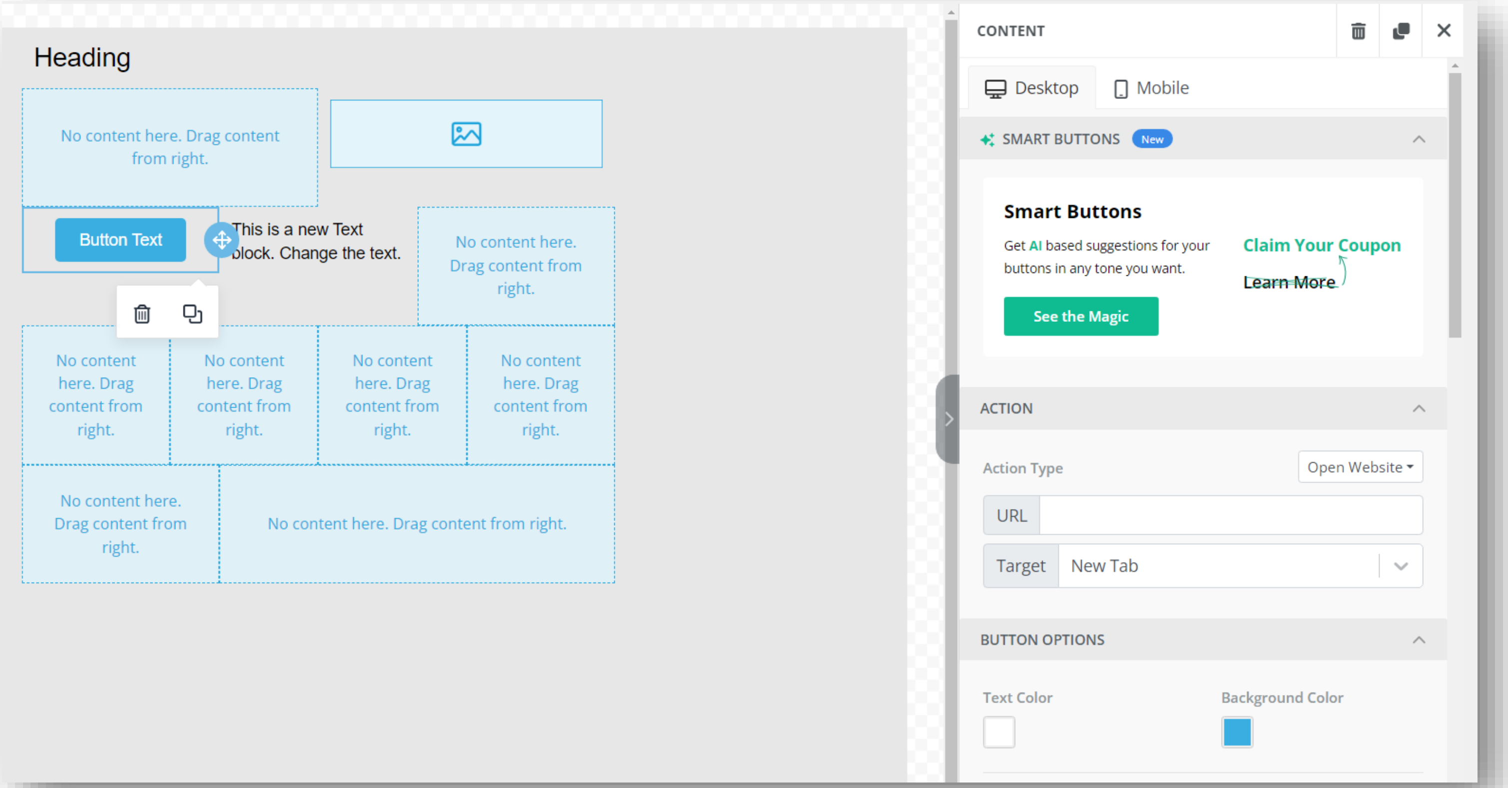
Standard Tools

Button

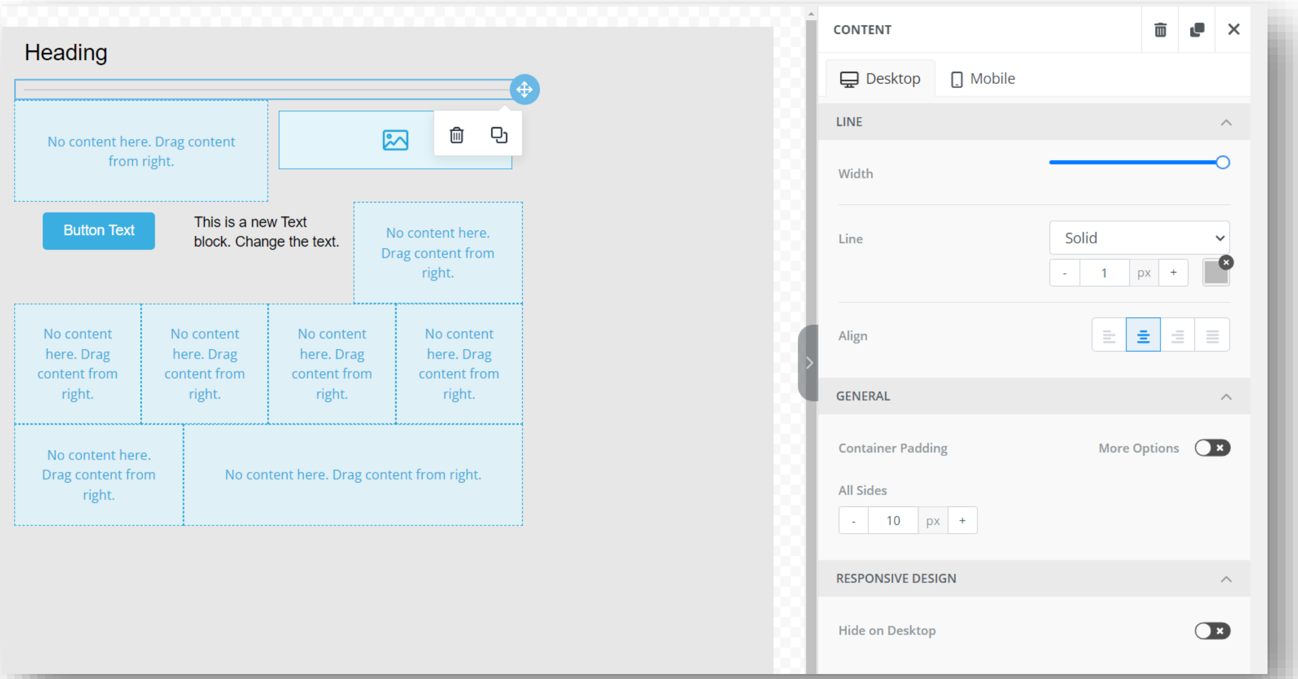
Encourage members to follow links by including attractive clickable buttons. Appearance and behavior are completely customizable.



Standard Tool

Divider

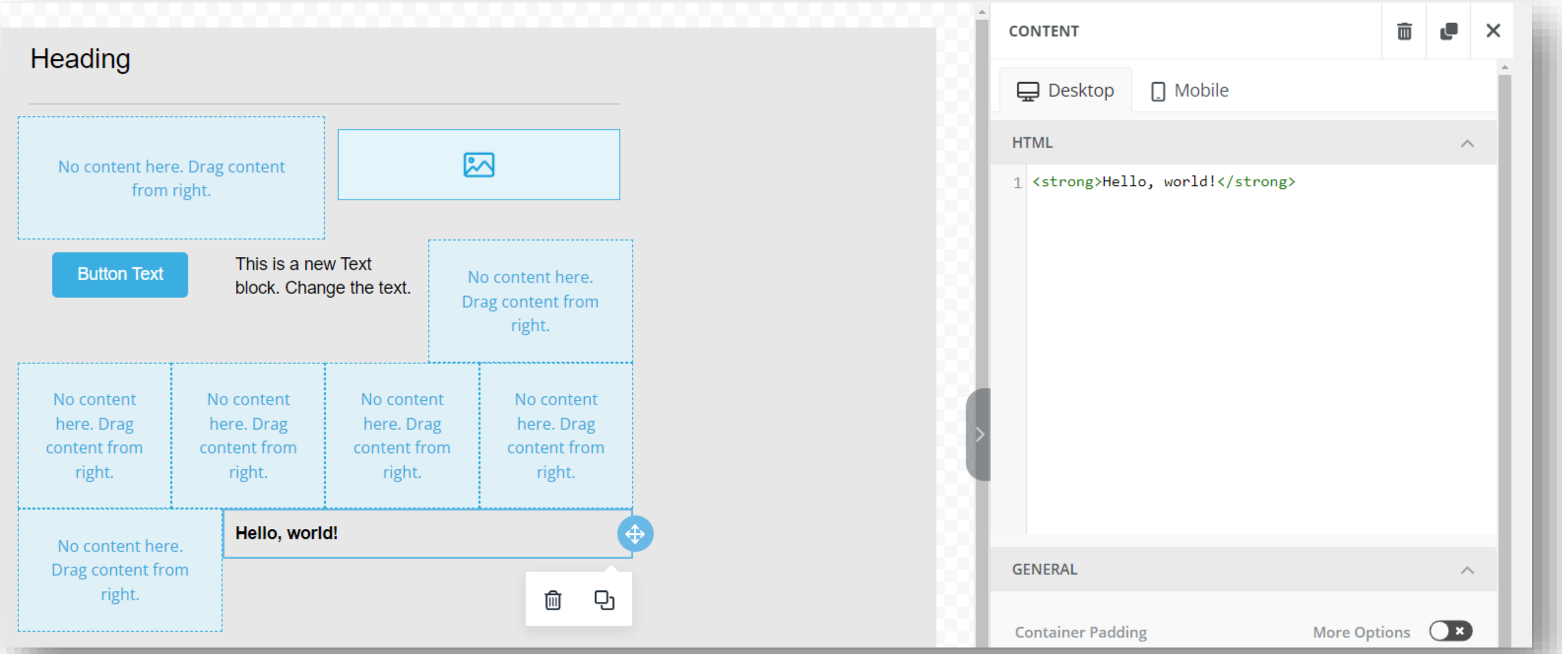
Add stylized horizontal lines to organize content and add visual interest.



Standard Tool

HTML*

Write your own or paste in HTML code in your newsletter.

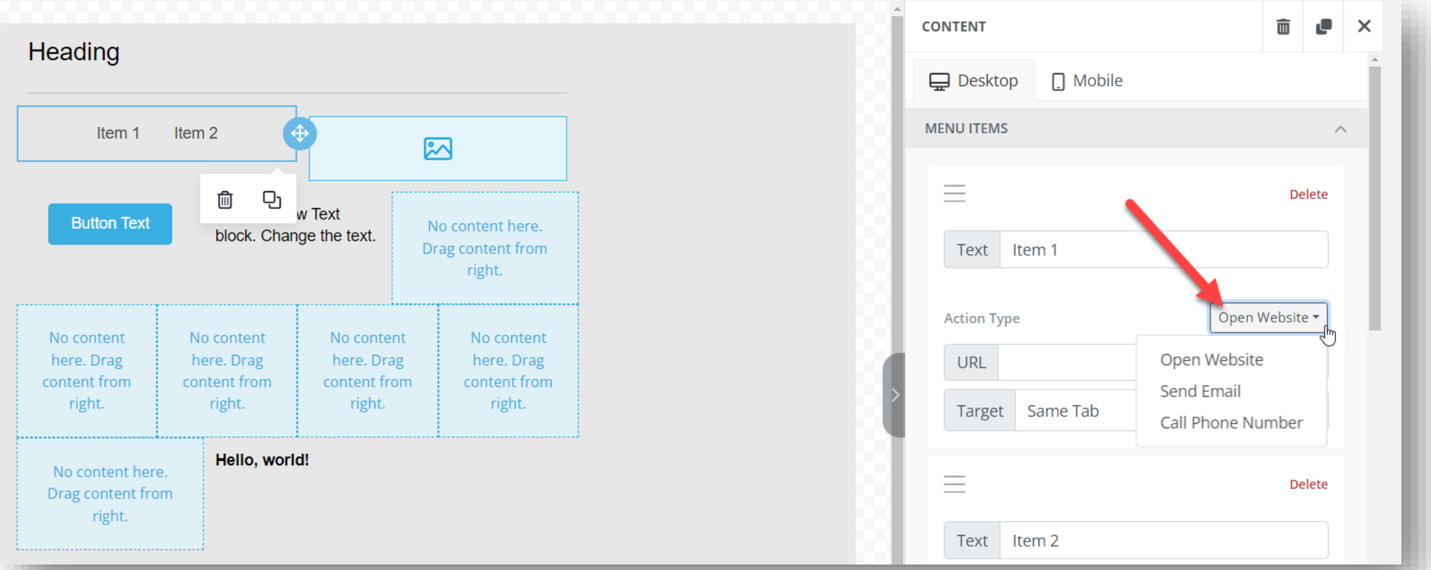


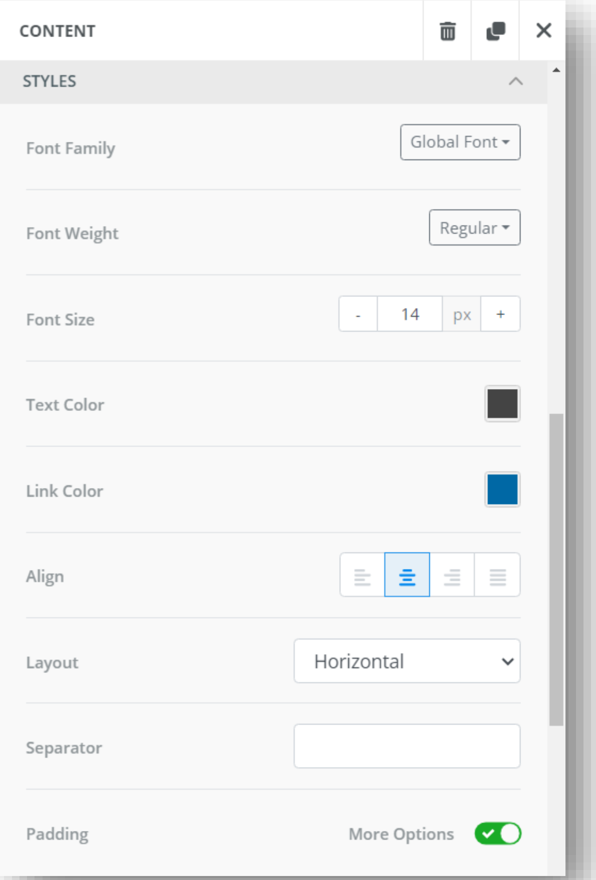
*ChamberMaster does not support troubleshooting this field; use at your own risk.

Standard Tools

Menu

Add menus in your newsletter and select from several behaviors. Colors, fonts, and layout (horizontal or vertical) is all customizable.

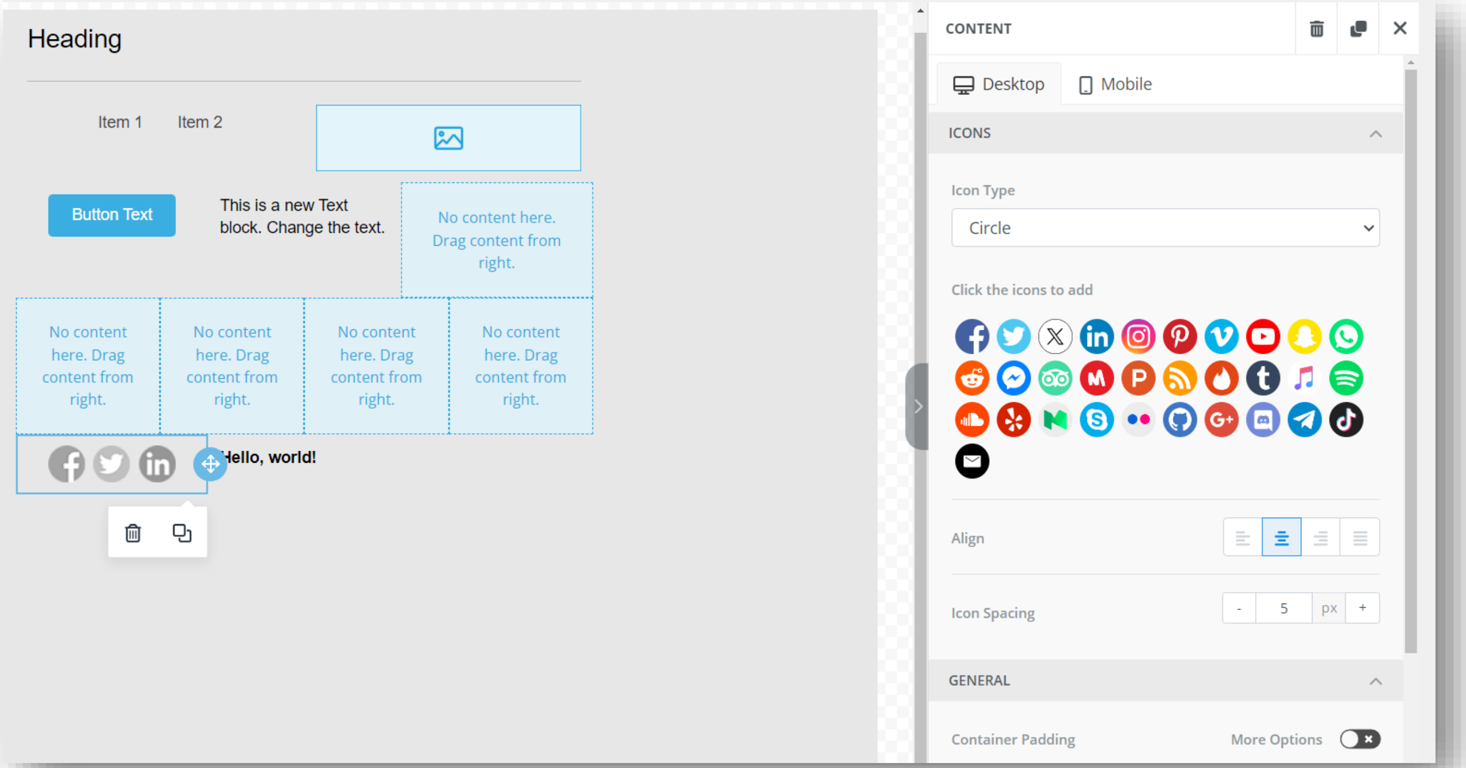




Standard Tools

Social

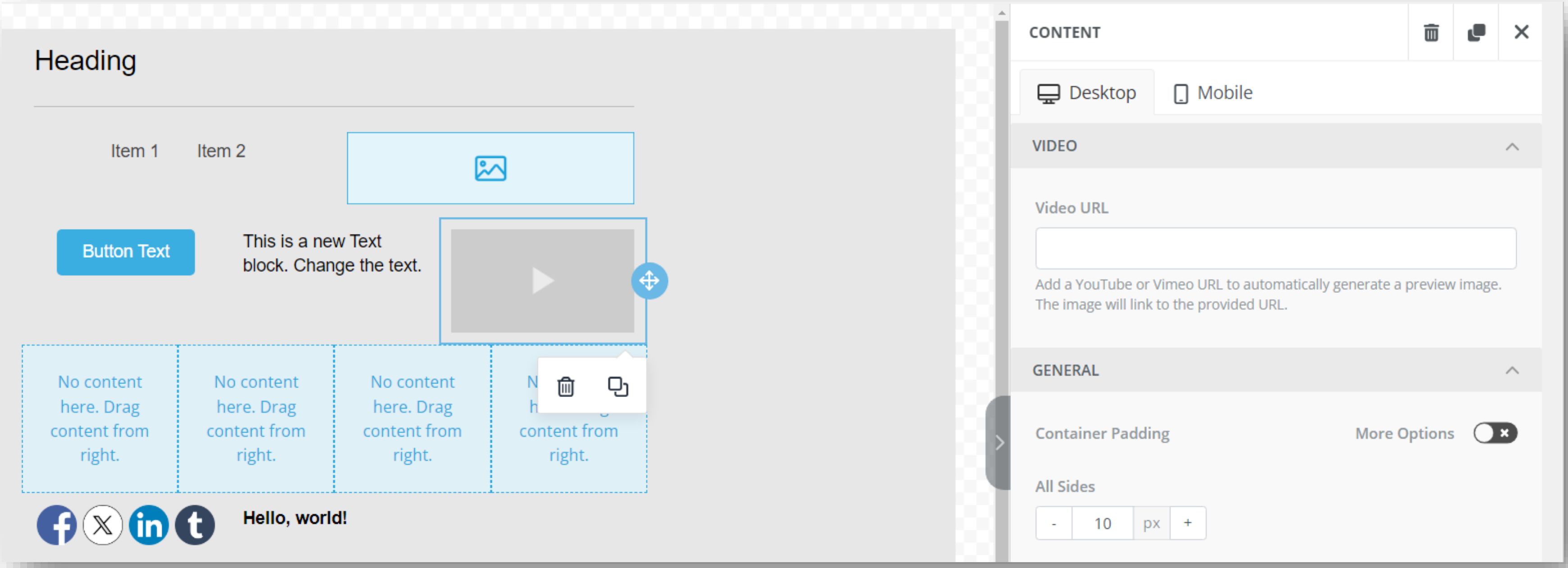
Add links to social platforms with colorful, branded icons.



Standard Tools

Video

Link to a YouTube or Vimeo video in your template.

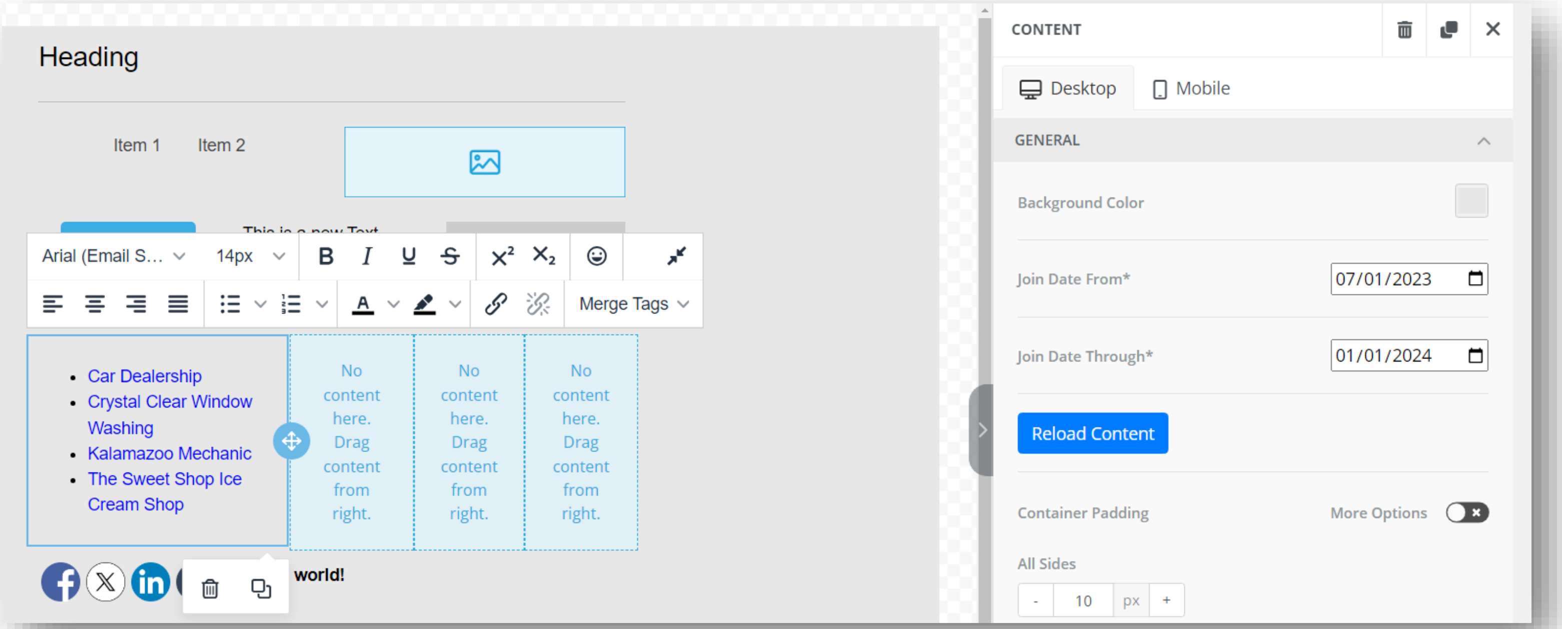


CUSTOM TOOLS

Custom Tools

New Members

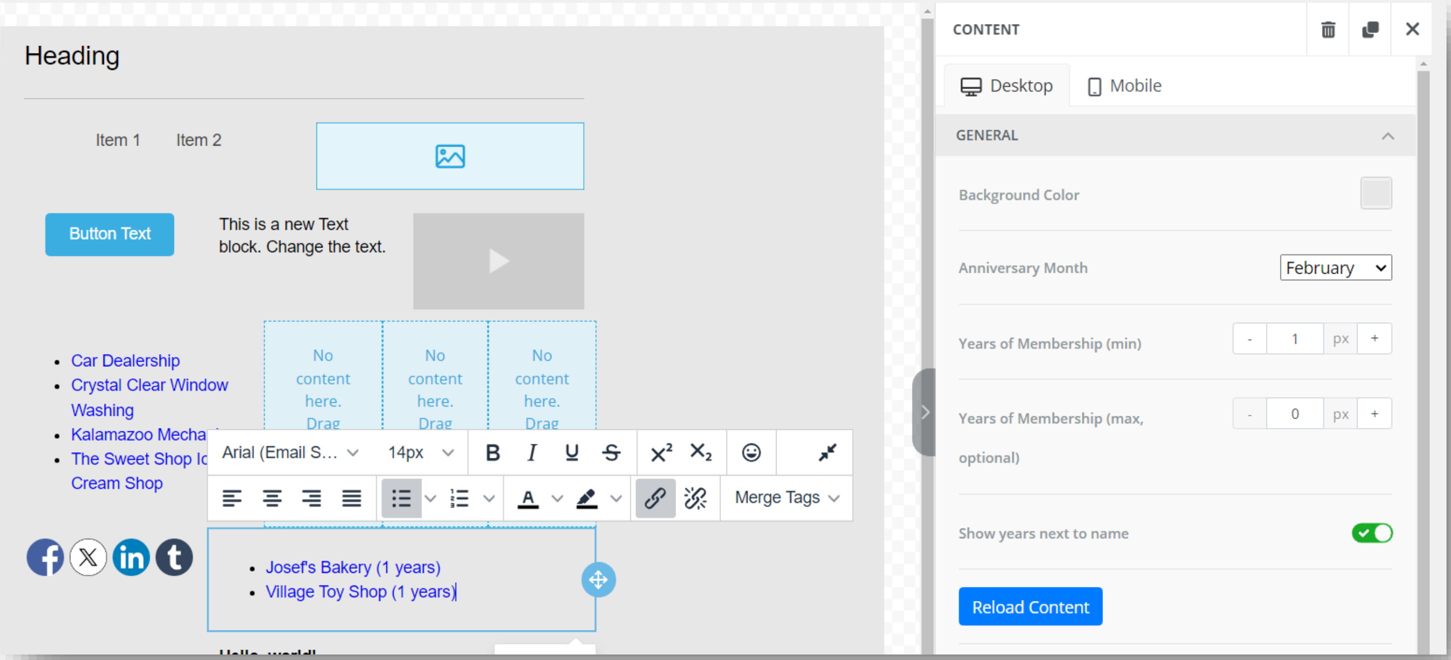
Use this tool to generate and format a list of new members within a specified date range in your template.



Custom Tools

Anniversary

Use this tool to generate and format a list of members with a specific anniversary month in your template.



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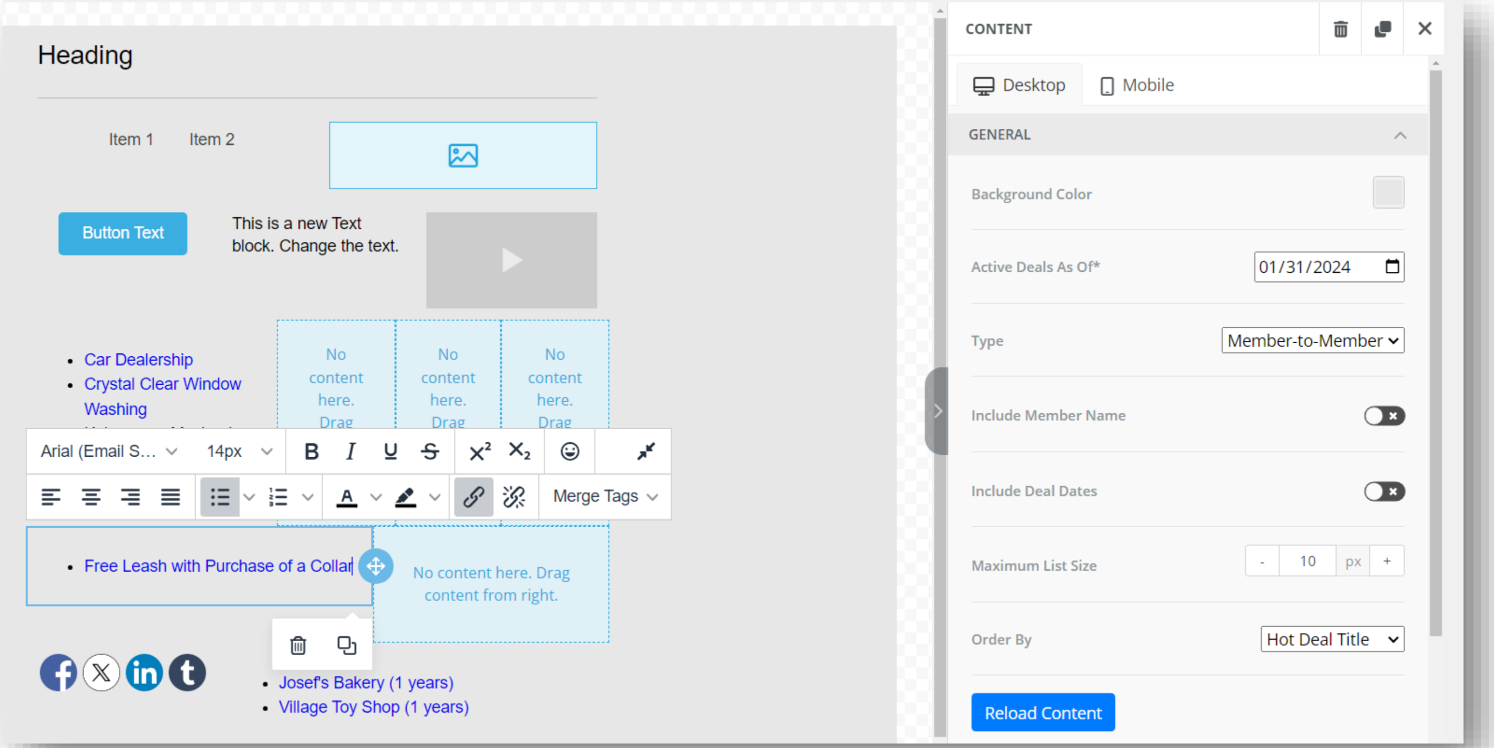
Custom Tools

Hot Deals

Add a list of current Public or Member-to-Member Hot Deals



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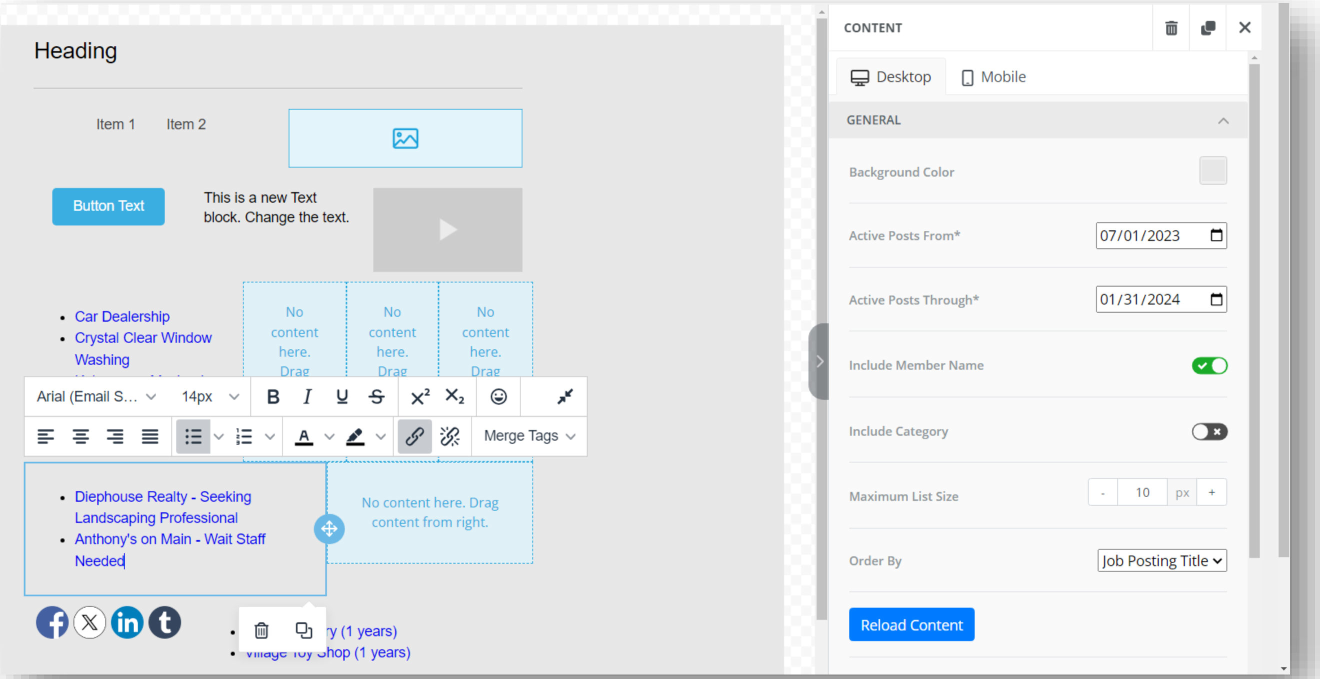
Custom Tools

Job Postings

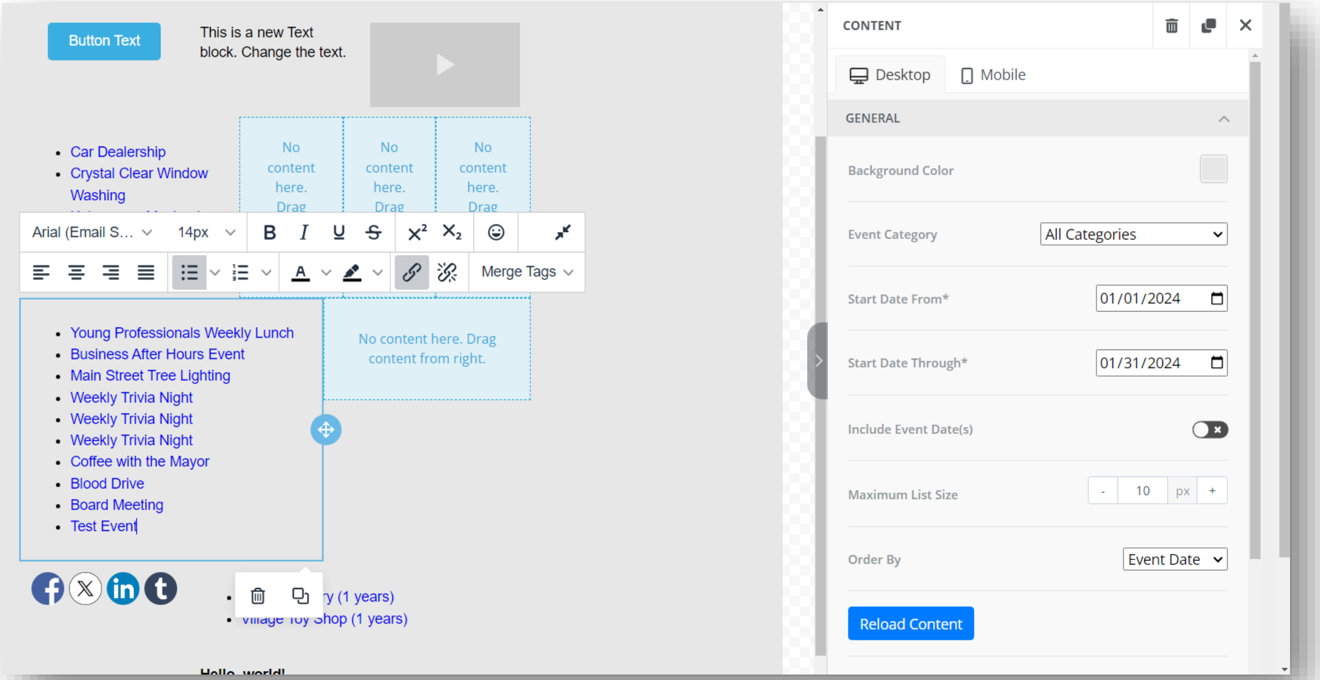
Use this tool to generate and format a list of active job postings within a specific date range.



Custom Tools

Events

Use this tool to generate and format a list of upcoming events within a specific date range.



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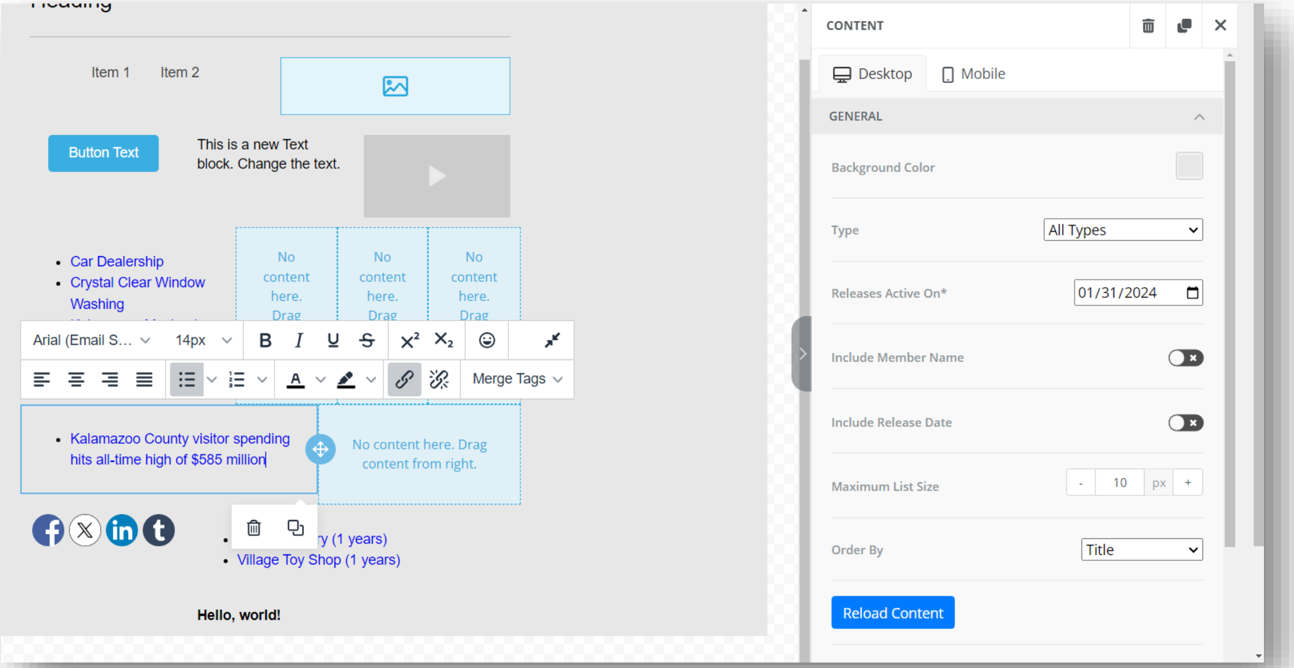
Custom Tools

News Releases

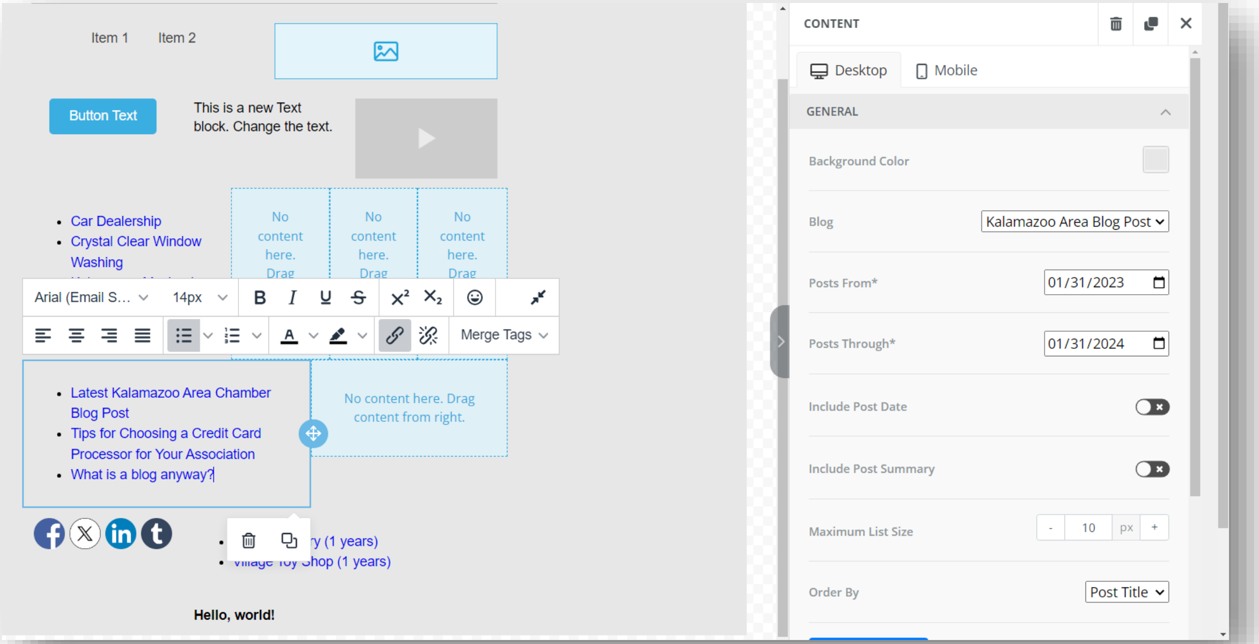
Use this tool to generate and format a list of recent news releases within a specific date range.



Custom Tools

Blog Posts

Use this tool to generate and format a list of recent blog posts within a specific date range.



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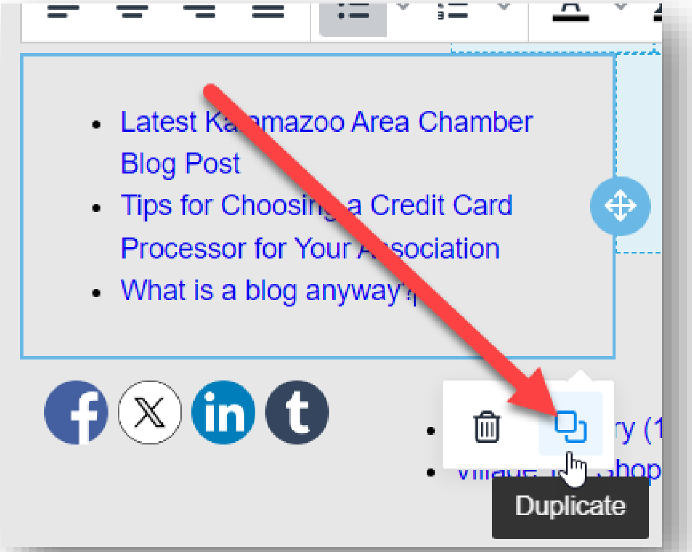
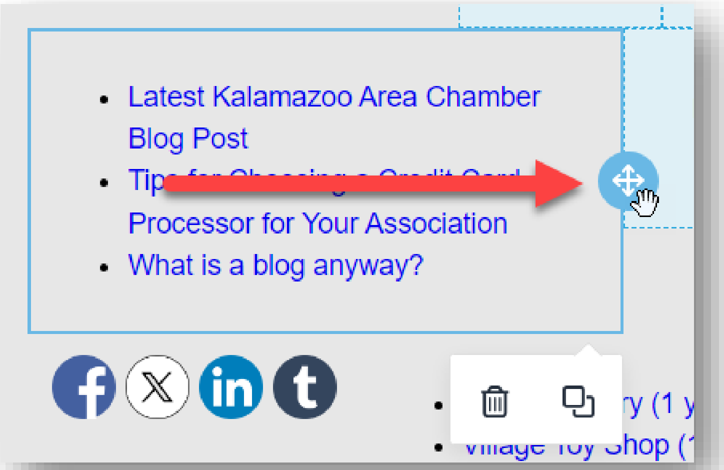
Common Tasks

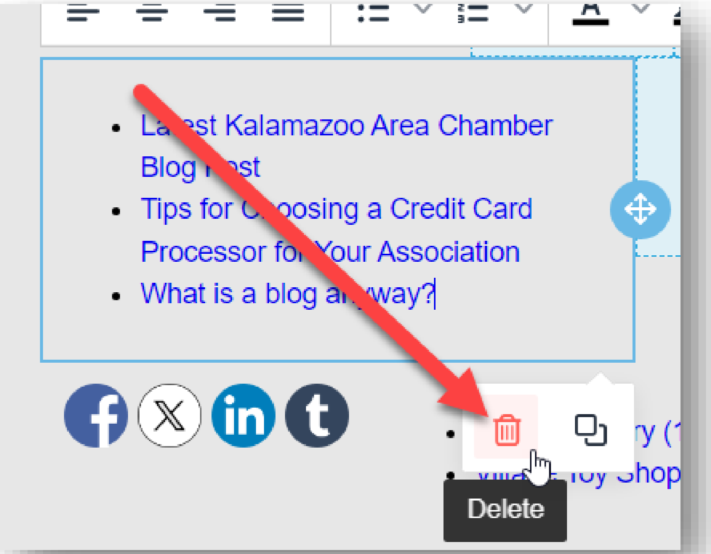
Copy or Duplicate a Content Block



Move a Content Block

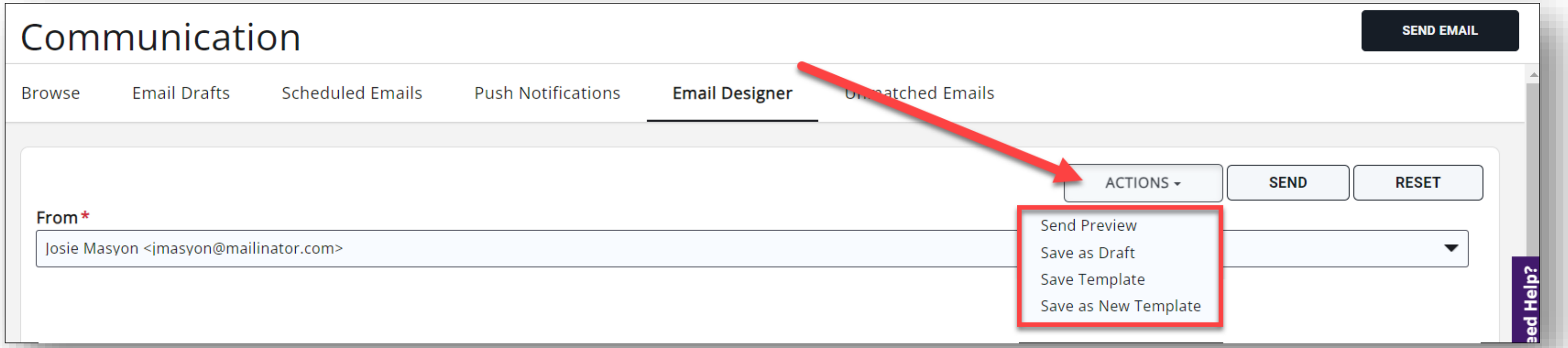


Delete a Content Block



Saving Your Work

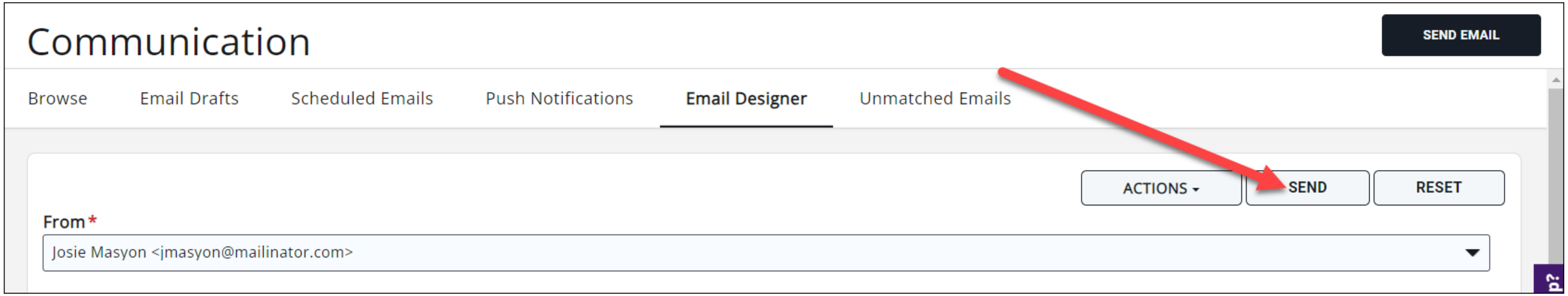
Use the **Actions** button and select your option:



- **Send Preview:** this sends a "test" message to a selected contact
- **Save as Draft:** saves the message so you can come back and finish it later
- **Save as Template:** saves the changes you made to the existing/selected template
- **Save as New Template:** this creates a new template in the system

Sending Your Newsletters

1. Open the template/draft of the newsletter
2. Make any changes as needed
3. Send a preview to yourself or another staff member for proofreading (optional, but recommended)
4. Use the **Send** button to send the newsletter



PUSH NOTIFICATIONS

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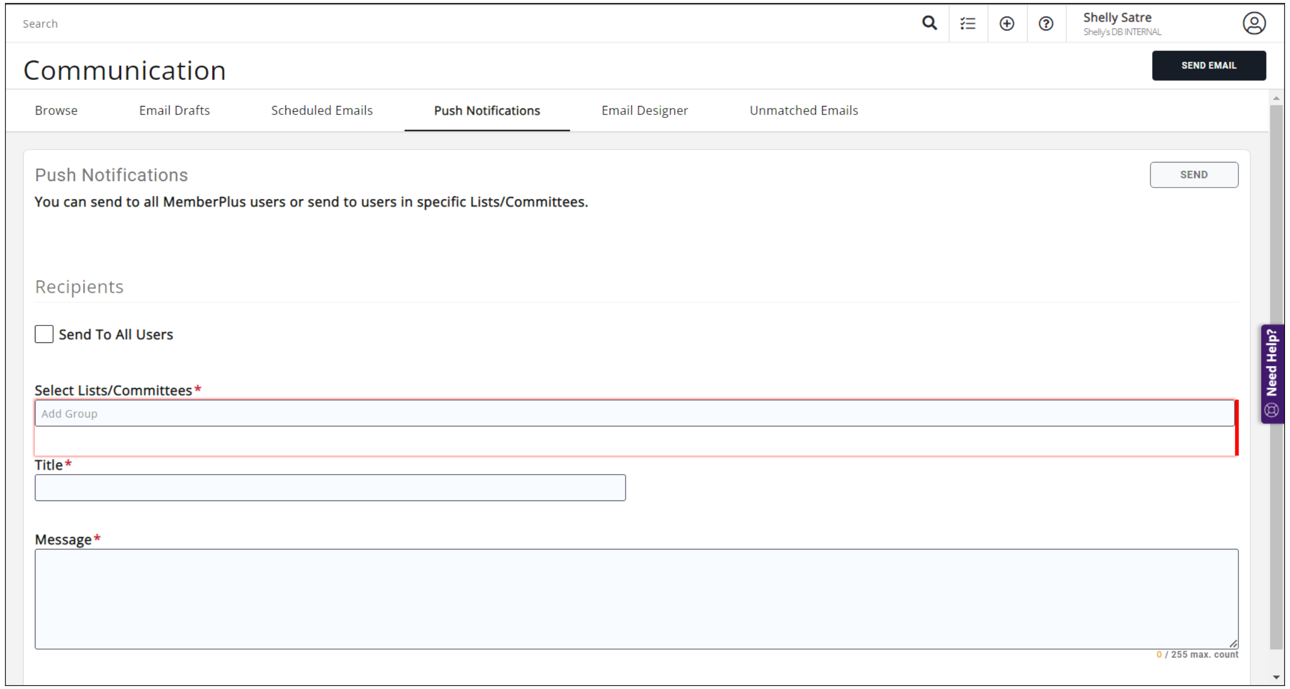
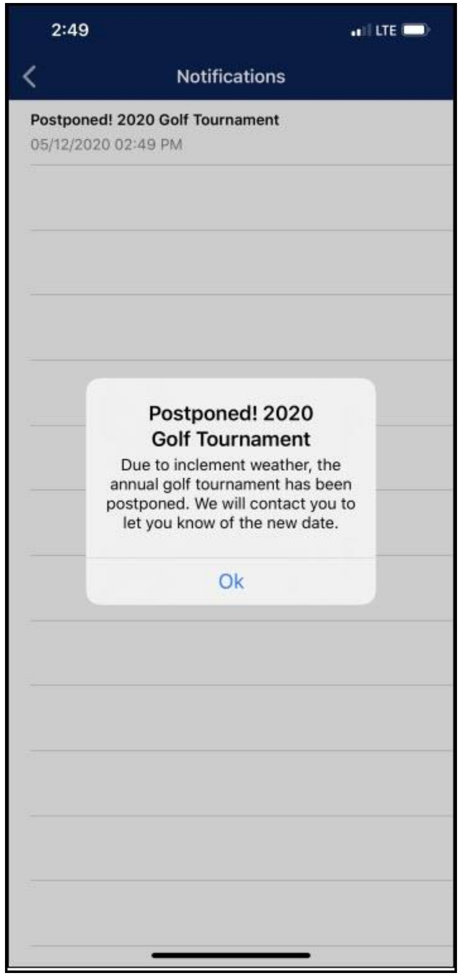
Push Notifications

You can easily send notifications to those members who have downloaded the MemberPlus app. You can choose to notify members of a list/committee, or all users.



Push Notifications



Members with notifications enabled (on their device AND for the app) will receive a popup notification.

If notifications are not enabled, all push notifications are also visible once logged into the MemberPlus app.

Article: Send a Push Notification

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LIST/COMMITTEE SETUP

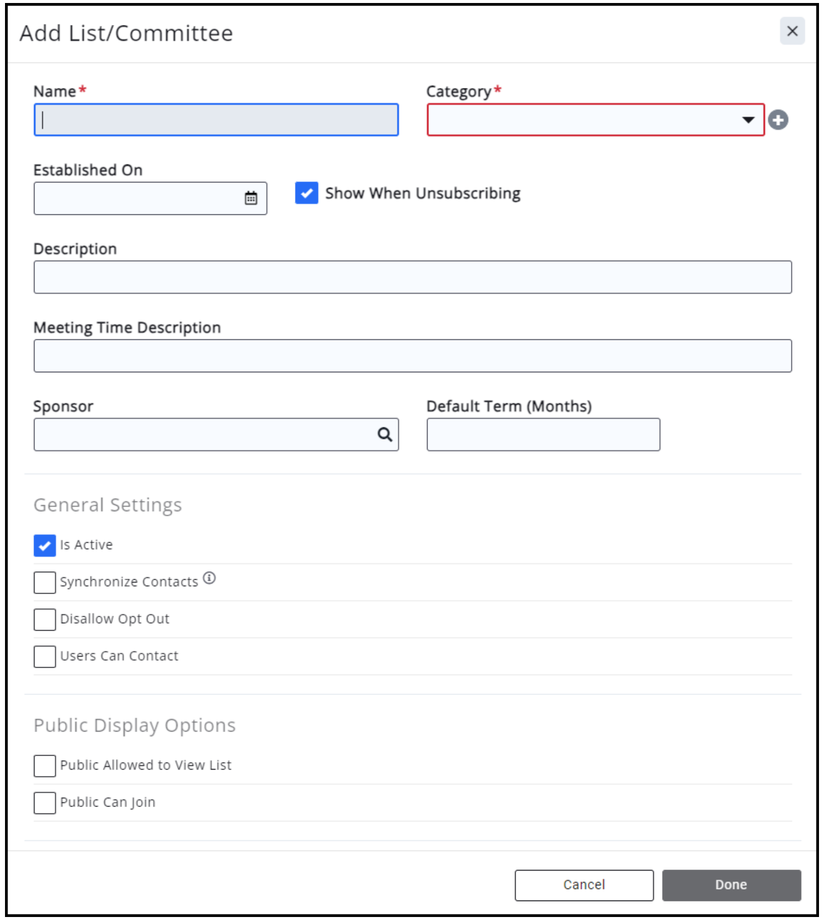
Create List/Committee

Add new list/committee
- Simplify communication by grouping contacts

Categorize list/committee

Allow members/public to automatically join lists/committees
- Maintain clean email lists
- Make joining easy

Synchronize to authorized third-party newsletter solution
- Constant Contact
- MailChimp



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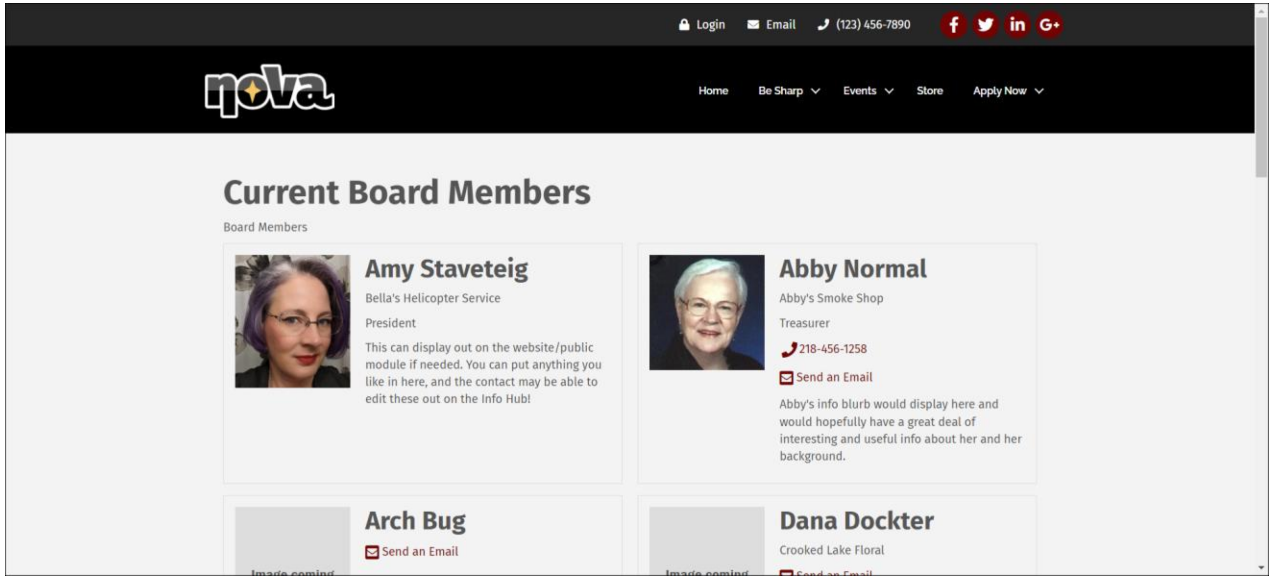
Display List Publicly

You can use the list/committee functionality to create a webpage of any contact list in your database.



Article: [Use Case: Publish Your List of Board Members]()

SMART LISTS

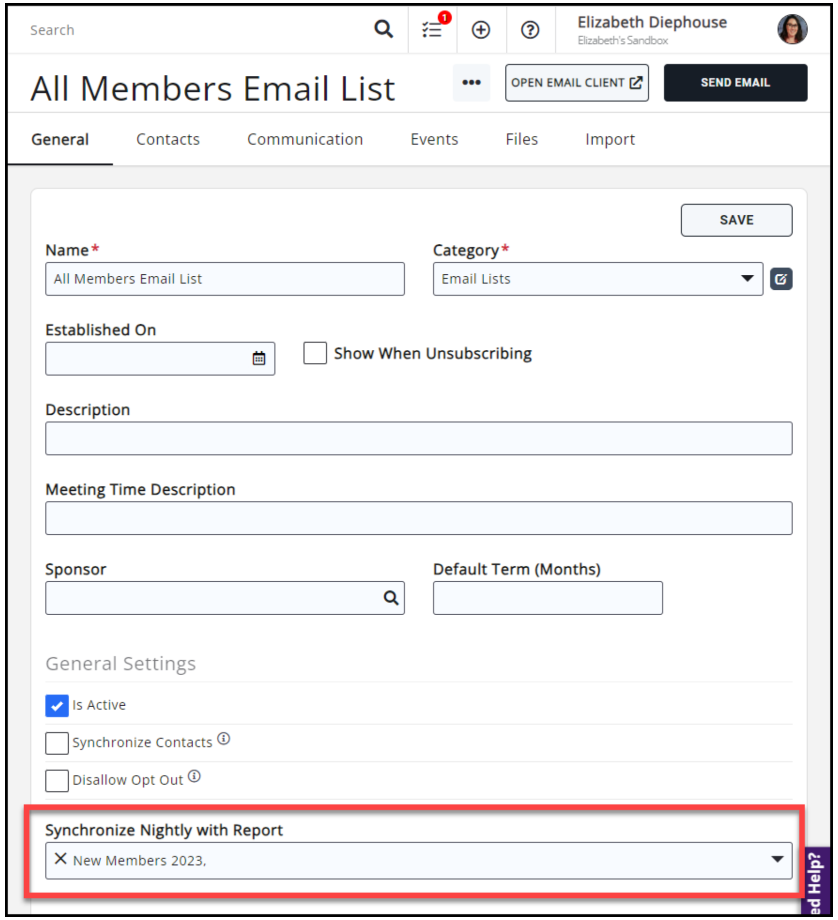
Smart Lists

Contacts on list continuously updated based on report criteria

Automatically updates on nightly basis

- Ensures list/committee roster is current
- List responsive to data in your database

Use any saved report to populate contact list of any active list/committee



Smart Lists

To create a Smart List:

- Set up the Report to return your desired result set of contacts.
- Save the Report
- Add to List
    - Create New List
    - Sync to the Report

Article: Smart List - Dynamically Update Contacts in Lists/Committee from Report Results

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MANAGING UNSUBSCRIBES

Managing Unsubscribes

When you send out emails to your lists/committees or send mass emails, the unsubscribe message you have configured in your settings is appended to those emails. A recipient can set restrictions on the use of the email by clicking the link included in the message.

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Unsubscribe Message

Unsubscribe message automatically included in bulk communication

- Customize for your organization

Provides options for future communication:

- Continue receiving emails
- Unsubscribe from group
- Restrict emails to only transactional (i.e., invoices, event confirmations, etc.)
- Update preferences themselves

Welcome to the Elizabeth's Sandbox! We are so grateful to have you as a part of this important organization. Our entire focus is to support your needs. As you start to become familiar with Elizabeth's Sandbox and its benefits, you may have questions or ideas, and we want to hear from you. So, let's start by introducing you to the Elizabeth's Sandbox staff who are always eager to help you.

- Perry Scope, Executive Director
- Patty O'Furniture, Membership Director

Over the next few weeks and throughout your first year as a member, we will be sending you periodic tips, information, and resources to help you make the most of your membership and your mission.

A great place to start is by following us on our various channels, ensuring you always have the latest and greatest information.

Again, thank you! We look forward to partnering with you.
Have a fantastic day,

Elizabeth Diephouse

KALAMAZOO EST. 1990 CHAMBER

This email was sent on behalf of Elizabeth's Sandbox located at 123 First Street, Kalamazoo, MI 49006. To unsubscribe click here. If you have questions or comments concerning this email contact Elizabeth's Sandbox at kalamazoochamber@mailinator.com .

Unsubscribe Process/Options

By clicking the link, the recipient can select from the following options:

Business Spotlight

Email Subscriptions for cheri.petterson@growthzone.com

- (selected) Continue receiving email from Cheri's Sandboxes (INTERNAL)
- Unsubscribe me from Business Spotlight
- Do not email me at this address except for transactional emails
- Update my preferences

Submit

Unsubscribe Process/Options

- **Continue Receiving Emails from {Your Organization Name}**
- **Unsubscribe me from {Group Name}**
- **Do not email me at this address except for transactional emails:** If this option is selected, the email will be marked as **Only Transactional Emails**. This ensures that the recipient does not receive any mass emails (including from your lists/committees as well as any mass emails you may be sending). However, any "transactional" type emails that you send (invoices and event confirmations) will continue to be sent. This will unsubscribe the member from **ALL** group communication. The recipient is **NOT** removed from the group.
- **Update my preferences:**

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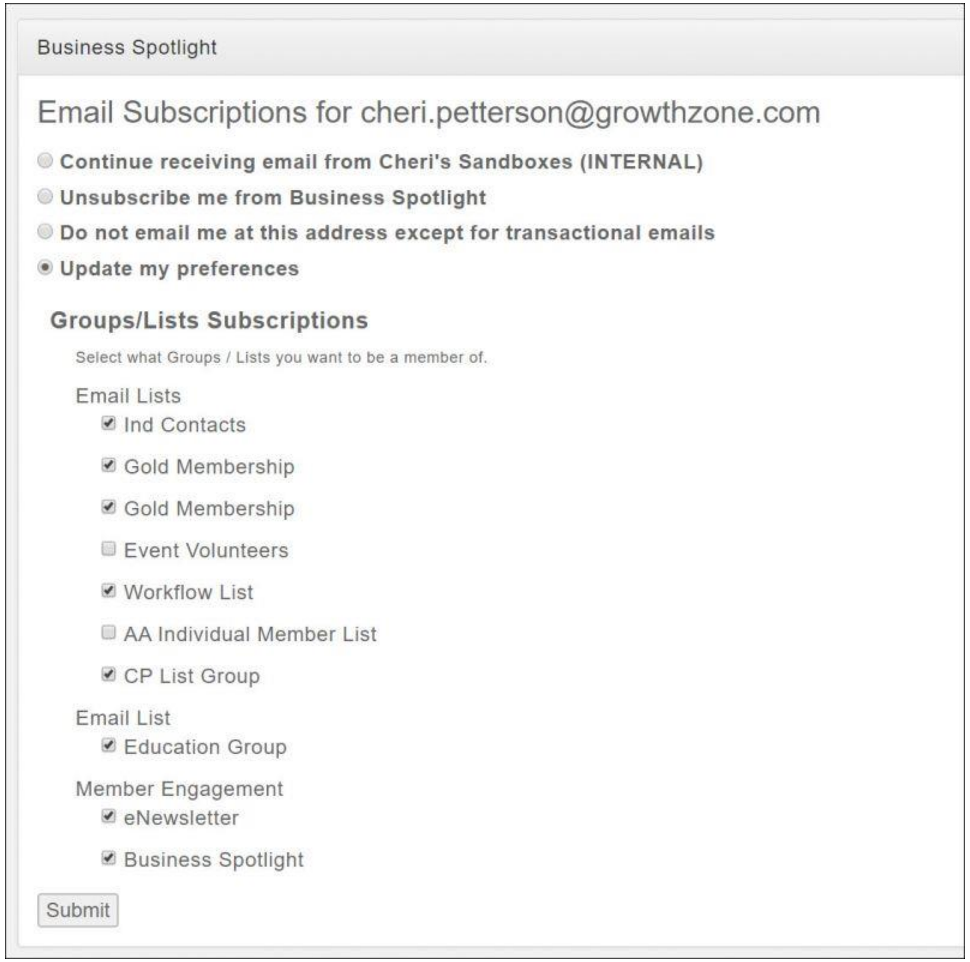
Unsubscribe Process/Options



The recipient may deselect the check-boxes for the groups they no longer wish to be subscribed to. The recipient will be marked as Do Not Contact within the group, but will NOT be removed from the group.

Unsubscribed List/Committee Contacts Report

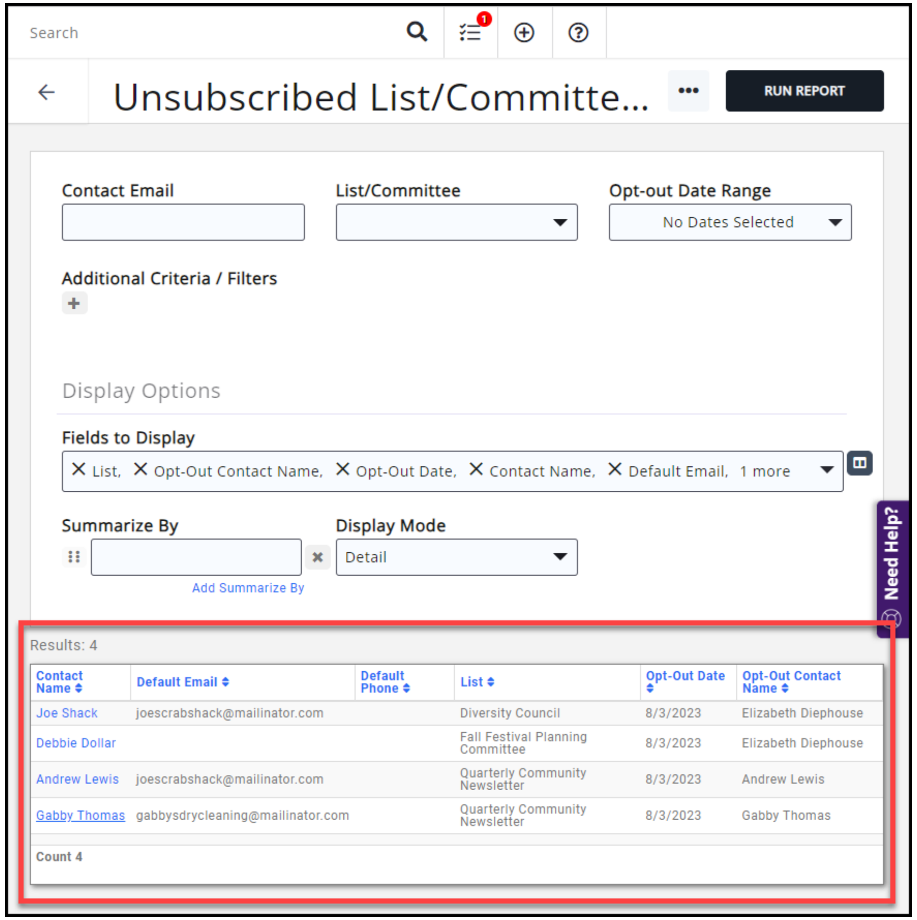
Lists currently unsubscribed members

Provides Opt-out date

Displays contact who unsubscribed

- Staff or member

Good troubleshooting report if member not receiving group communications



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Managing Unsubscribed Emails

Check the list:

- See if the contact is marked as “Do Not Email” in the list
- Change the setting ONLY with the contact’s explicit permission

Check the contact:

- See if the contact’s email address is marked as “Transactional Emails Only” or “Do Not Contact”.
- Change the setting ONLY with the contact’s explicit permission

Resubscribe the contact:

- Resubscribe contacts ONLY with the contact’s explicit permission

MANAGING INVALID EMAILS

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Managing Invalid Emails

When an email is bounced or gets a spam report, it's immediately flagged, and GrowthZone will prevent the sending of ANY emails to flagged/invalid emails. The Invalid Email Addresses Report provides a list of all emails in your database that have been marked invalid.

Invalid Email Addresses Report

From the report, you will be able to click into the name of a contact to access the contact's General Tab. From this tab, you will be able to manage the invalid email.

Results: 6

Contact Name	Email Address	Validity Status	Date Invalid
A Place for Dogs	randyg@mailinator	Bad Domain	
Mark Laurence	marlk@mailinator	Bad Domain	
Susan Williams	swilliams@mailinator.com	Generic Bounce	1/23/2019
Sheryl Rassler	sheryl.rassler@growthzone.com	Generic Rejection	7/25/2022
Chamber Master	chamber_master@mailinator.com	Generic Bounce	9/28/2022
Deerwood Animal Shelter	deerwoodshelteradmin@mailinator.com	Generic Bounce	10/27/2022
Count 6			

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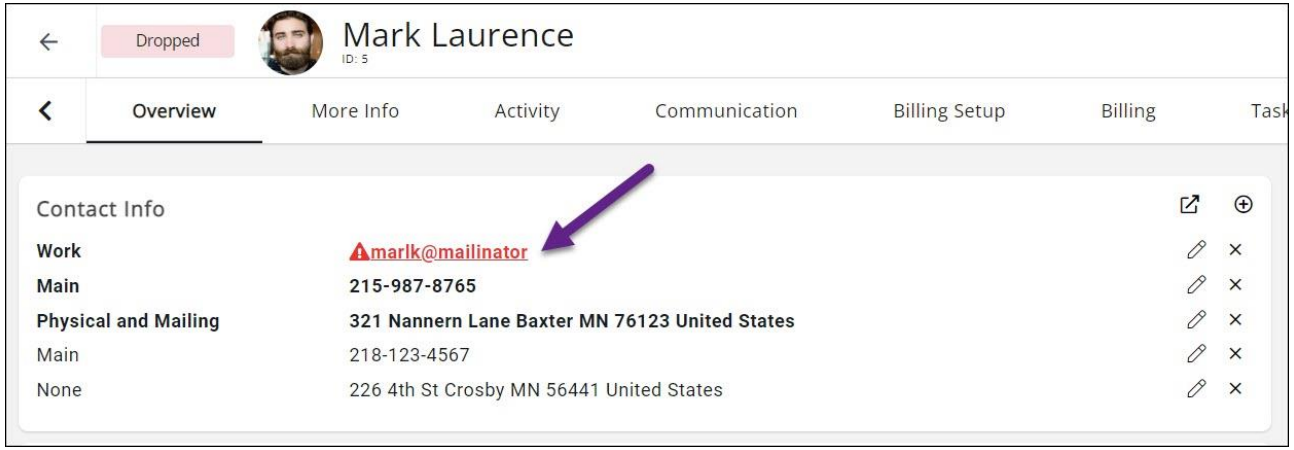
Correcting Invalid Emails

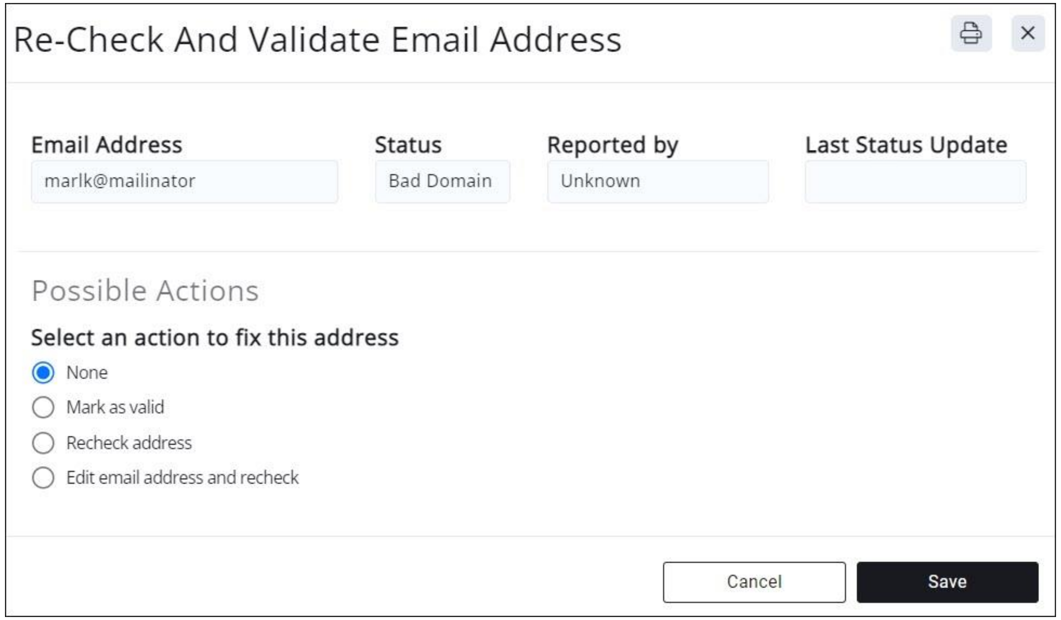
If a users email address has been noted as invalid, a red yield sign will be displayed in the contact info section next to the email.



You can recheck the email, mark an invalid email as valid, or edit email address and recheck.

Correcting Invalid Emails

On the contact's Profile tab, click the invalid email and then select your desired action:



Correcting Invalid Emails

- **None:** select this option to simply leave the email address as invalid.
- **Mark as valid:** select this option to mark the email as valid. If you've personally verified this address is good even though the verification system indicates it is not, this is the option to mark it as good and remove it from the Invalid Email list.
- **Recheck address:** select this option to recheck the email address. If the address is found to be valid, will be removed from the invalid list. If the address is found to be invalid, it will remain on the invalid list.
- **Edit email address and recheck:** selecting this option will open a text box for you to enter a new email address. The system will check the new email address during its regular overnight process.

Article: Manage Invalid Email Addresses

THANK YOU!!!

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