

You're Responsible for Communications/Marketing... Now What?

As you view the Communications/Marketing Director video, here is a worksheet to help you make notes, and begin to define those functions available to you in your GrowthZone tool kit that will benefit you the most in managing your communications and marketing. If you are currently going through onboarding, your notes are conversation topics you should plan to have with your project manager to guide your setup.

Customization	
<i>Think about the messages you send and how those messages reflect your organization and brand.</i>	
<ul style="list-style-type: none"> Do you want a consistent look for all staff email signatures? Do you want to brand or customize the communications going out to your members? Which member-facing messages would you like to customize? 	
Lists/Committees <ul style="list-style-type: none"> Do you have existing lists/committees (groups) that you want set up in GrowthZone? Are there new lists you wish to create? Do any of your lists need to update regularly with a report? Do any of your lists need to be visible out on your public website (i.e. Board of Directors)? 	
Marketing Automation <ul style="list-style-type: none"> Are you subscribing to Marketing Automation? If not, would you like to learn more about it? If so, do you have a plan for the workflows you want to put in place, and the email templates or Email Designer templates/landing pages that will need to be created? Make a note of some of your desired workflows here. 	



Flexibility

What are some of the options you need to consider?

- Do you need to [log messages sent from outside GrowthZone](#)?
- Do you use Outlook? If so, you may wish to consider GrowthZone's [Outlook Add-In](#).
- If not, have you added the [archive email](#) address to your address book for easy addition to the BCC of any emails?
- Do you use ConstantContact or MailChimp? Do you want to add that to your [integrations](#) and sync lists from GrowthZone?
- If you are syncing from GrowthZone to ConstantContact or MailChimp, [which lists need to be synced](#)?

Engagement

What are we offering to our members that will encourage them to participate? How can we make it easy for them?

Info Hub

- Are you planning to launch the [Info Hub](#) to your members?
- What [levels of access](#) would you like to set up?

Web Content

- Would you like to post job listings/event submissions/hot deals to your members and/or the public?
- Are you subscribing to the [Web Content](#) module?
- If not, would you like to learn more about it?
- Do you want [to integrate any of the Web Content pages into your public website](#)? Which ones?



<p>MemberPlus App</p> <ul style="list-style-type: none"> • If you are planning to encourage your members to download the MemberPlus App, you will need to set up the Info Hub and access levels. 	
<p>Forms/Surveys</p> <ul style="list-style-type: none"> • Are you subscribing to the Forms/Surveys module? • If not, would you like to learn more about it? • If so, are you sending out a call to action of some kind with your messages? 	
<p>Marketing</p>	
<p><i>How do we get relevant content/messaging to our members?</i></p>	
<p>Automated Messaging</p> <ul style="list-style-type: none"> • Do you wish to customize any of your automated messages to your members? • Do you wish to disable any automated messages to your members? 	
<p>Marketing Automation</p> <ul style="list-style-type: none"> • Are you subscribing to Marketing Automation? • If not, would you like to learn more about it? • If so, do you have a plan for the workflows you want to put in place, and the email templates or Email Designer templates/landing pages that will need to be created? 	
<p>Sponsors/Ads</p> <ul style="list-style-type: none"> • Are you subscribing to the Sponsors/Ads module? • If not, would you like to learn more about it? • If so, start thinking about sponsorship levels for your events, which public pages will feature ads, and the ad sizes you wish to display on those pages 	



Directories

- How many [directories](#) do you want?
- Will they be public, member-only, or both?

Will there be multiple [display types](#) available, or only one for all listings?

Management

What will make management of your communications easier?

- Comprehensive log and search in the [Communications module](#)
- Detailed [Communication Stats](#) for every message
- [Unsubscribed Contacts Report](#) to review/manage unsubscribed contacts
- Form Responses can be viewed in the [Forms/Surveys module](#) or via the [Form Response Report](#)
- Directory listings can be reviewed in the [Directory Contact Report](#)

Productivity

How can I do more with less time?

- Members can manage their own communication preferences via the configurable [unsubscribe message](#)
- Ability to set up templates for repeatable [projects/campaigns and assign tasks to staff](#)
- Review/send [Contact Engagement](#) statistics

Reports

- What [reports](#) are you currently running for analysis of your communication and marketing?
- What communication data points are you needing to [track and report on](#)?

