

# GrowthZone: 5 Ways to Promote the Info Hub to Your Members

# Agenda

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## 5 Ways to Promote the Info Hub to Your Members

### Email:

- Mass Introduction Email
- Individual Emails
- Targeted Emails

### Newsletter

### Social Media

### Website

### Events

### Bonus: Automate via Marketing Automation

# Launching Your Info Hub

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One of the great features of GrowthZone is The Info Hub, a member center that enables your users to access key information and actively engage with your organization.

The Hub allows users to search the directory of other members, see upcoming events, submit events, signup for lists and committees, view their membership details, view and complete billing-related steps (pay invoices, view past billing, see open invoices, etc.), see completed certifications (if applicable) and more.

# Launching Your Info Hub

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For more information on setting up your Info Hub and the options available, there is a three-part training series:

[Info Hub Pt 1: Setup and Options](#)

[Info Hub Pt 2: Tour and Content Management](#)

[Info Hub Pt 3: Launch and User Management](#)

# Launching Your Info Hub

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Once your Info Hub is set up and ready to go- how do you get the word out? A one-time email, social post, or blurb in the newsletter isn't likely to make much of an impact; use several channels to promote the benefits and ease of using the Info Hub to your members.

# Option 1: Email

# Email: Mass Introduction Email

## Bulk Email Initial Invitation:

GrowthZone provides a pre-configured email template for your initial communication:

“Invite members to login and access benefits”

It is recommended that you either customize this template or create your own, specific to your organization and your Info Hub implementation.

[GZ Knowledge Base: Edit a Default Email Template](#)

Edit Email Template < 5 of 5 > ×

**Name\***  **Description**

**Category\***

**Subject\***

**Template Text\***

**B I U X<sub>1</sub> X<sub>2</sub> A T<sub>1</sub> T<sub>2</sub> [Icons] [Icons] [Icons] [Icons] [Icons] [Icons] [Icons] [Icons]**

**Insert Merge Field**

Hello **{{ Contact Name }}**

We are thrilled to share with you how you can use your membership with us to network, view member only events, share your contact information with other members for networking, access vital resources, use our site to advertise news, events, deals and recruit new employees!

[Create your login here](#)

[Login here](#) and make sure your contact profile is complete and update-to-date so others can successfully connect with you. Explore the site and have fun taking advantage of special members only access.

- Search the directory listing - your contact information and our other members are available in the "members only" hub.
- Personalized member listing page - included in the directory is your own information page on the website which can include a description area, location, logo, photos and contact details based on your membership level.
- Resources- being part of our association includes access to key sites, documents and other information

**[BONUS SESSION: “5 Email Templates You Should Customize \(and how to do it!\)”](#)**

# Email: Mass Introduction Email

Who do you need to invite? Run a report and use the “Add to List” function OR use one of the built-in system mailing lists.

The screenshot shows the 'Active Members' report interface. At the top, there is a back arrow, the title 'Active Members', a three-dot menu, and a 'RUN REPORT' button. Below the title are several filter sections: 'Membership Type', 'Level', 'Membership S...', 'Membership Category', 'Start Month', 'Renewal Mont...', and 'Fee Item', 'Bill Frequency'. A section for 'Additional Criteria / Filters' is expanded with a plus sign. Below that is a 'Display Options' section with a 'Fields to Display' list containing: Contact Name, Default Email, Default Phone, Membership, Membership Activation Type, Membership Start Date, Membership Status, and Renewal Month. At the bottom, there is a 'Summarize By' field and a 'Display Mode' dropdown set to 'Detail'. A context menu is open over the 'Add to List' option, listing: Export as PDF, Export as Excel, Export Summary as Excel, Export Summary as PDF, Email Report, Add to List (highlighted), Mailing Labels, Save Active Members, Save As New Report..., and Add as Favorite Report. A 'Need Help?' button is visible on the right side of the interface.



# Email: Individual Emails

< 10 / 104 > EDIT INDIVIDUAL

- User Login
- Send Email
- Open Email Client
- Log Note
- Log Call
- Create Reminder
- Contact History
- Delete Contact
- Merge Contact
- Common Reports
- Create Letter/Docum
- Contact Changes

Access Level  
User - Primary

Login Info

Login Username  
Andi.Spear-Riel

Password Reset Email  
andispearriel@mailinator.com

User Login and Security email will always be sent to the Contact's Primary Email Address

Send Login Instructions Email  Send Password Reset Email

Manually Set Password

Prohibited characters are #, < or >.

Access Levels with Associated Organizations

Organization Name	Access Level
Andi's Business	User - Primary

It is easy to send individual members (new AND existing) instructions on how to log in!

GZ Knowledge Base:  
Provide Info Hub Access to Individual Contacts

# Email: Individual Emails

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If you are manually approving members, you can make sending this email part of your approval process.

This method also works if someone has never created their account and no longer has the invitation email or has an email with an expired link.

**NOTE:** the link to create the account is only good for 72 hours. After that, a new email will need to be sent OR the member can access the “Create Account” link on the Info Hub Login Page and manually create their account.

# Email: Individual Emails

Don't forget to review the "New Member Access" email template and copy/customize it if needed!

GZ Knowledge Base:  
Edit a Default Email Template

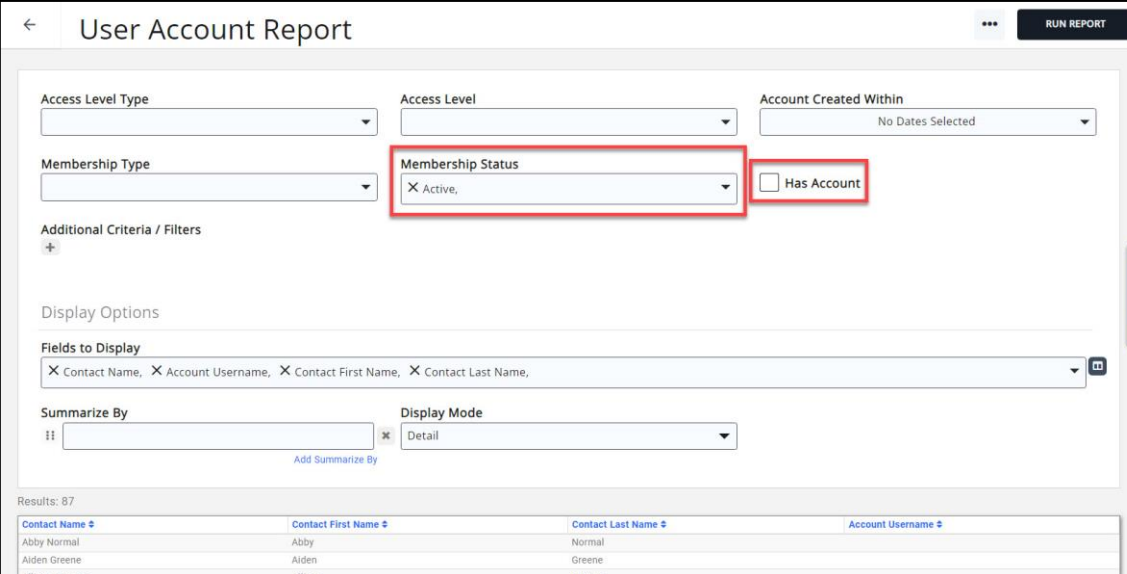
Edit Email Template < 14 of 18 > ×

<b>Name*</b>	<b>Description</b>
<input type="text" value="ARCHIVE New Member Access"/>	<input type="text"/>
<b>Category*</b>	
<input type="text" value="Member communication"/>	
<b>Subject*</b>	
<input type="text" value="Create your account!"/>	
<b>Template Text*</b>	
To create your account <a href="#">click here</a>	
Or if the link isn't working the website address is <a href="#">{{ LAULoginActivationURL }}</a> . This link is valid for 72 hours.	
If you have any questions or need help creating your login, please contact us for assistance.	
<a href="#">Click here</a> for redirect to Billing tab	
Thank you,	
<a href="#">{{ TENName }}</a>	
<a href="#">{{ TENPhoneNumber }}</a>	
<a href="#">{{ TENEEmailAddress }}</a>	
<b>From Email Address</b>	
<input type="text"/>	
<input type="checkbox"/> Make Available to All Users	
<input checked="" type="checkbox"/> Shows in Template list	
<input type="button" value="ATTACH FILES"/>	
<input type="button" value="Cancel"/> <input type="button" value="Done"/>	

# Email: Targeted Emails

To find members who have not created their account:

1. Open the [User Account Report](#).
2. Select Membership Status = Active.
3. Deselect the "Has Account" option.
4. Add/remove Fields to Display as preferred.

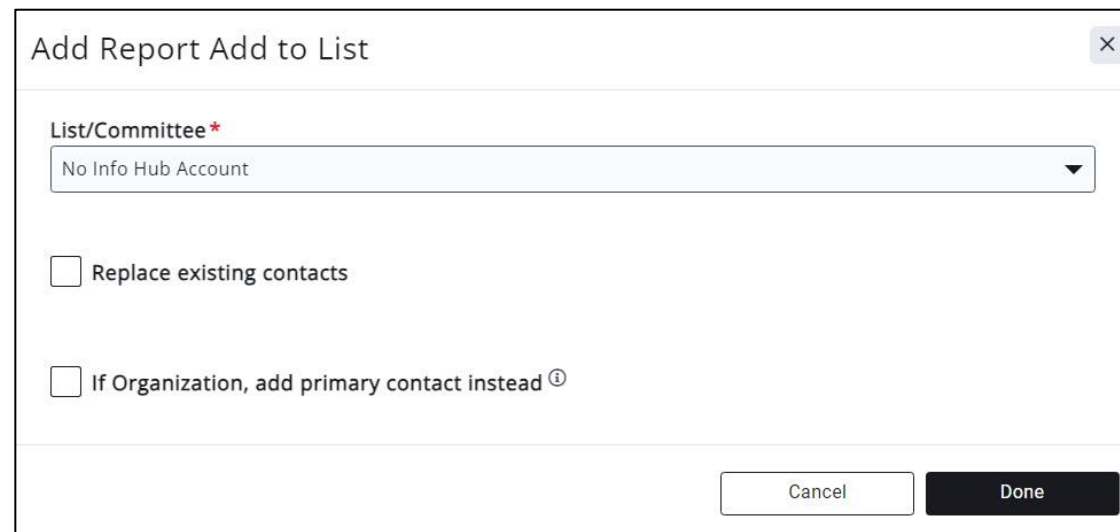


The screenshot shows the 'User Account Report' interface. The 'Membership Status' dropdown is set to 'Active', and the 'Has Account' checkbox is unchecked. The 'Fields to Display' section includes 'Contact Name', 'Account Username', 'Contact First Name', and 'Contact Last Name'. The 'Display Mode' is set to 'Detail'. The results section shows 87 results with columns for Contact Name, Contact First Name, Contact Last Name, and Account Username.

Contact Name	Contact First Name	Contact Last Name	Account Username
Abby Normal	Abby	Normal	
Alden Greene	Alden	Greene	
Allison Greene	Allison	Greene	

# Email: Targeted Emails

Use the “Add to List” option in the report to add to or create an email list for these members.



The screenshot shows a dialog box titled "Add Report Add to List" with a close button (X) in the top right corner. Inside the dialog, there is a dropdown menu labeled "List/Committee\*" with the text "No Info Hub Account" and a downward arrow. Below the dropdown are two checkboxes: "Replace existing contacts" and "If Organization, add primary contact instead" (with an information icon). At the bottom right of the dialog are two buttons: "Cancel" and "Done".

GZ Knowledge Base: [Add Report Contacts to a List/Committee](#)

# Email: Targeted Emails

You can now save the report and sync the list to the report. This will update the list nightly, and you can send periodic reminder emails to everyone who has not yet created their Info Hub account.

GZ Knowledge Base: Smart List

The screenshot displays a software interface for configuring a report. A modal window titled "Add Save Report..." is open, allowing the user to save the report. The modal contains the following fields and options:

- Report Name \***: No Info Hub Account
- Description**: User Account Report for Members who have not created their Info Hub Account
- Hide This Report From Other Users
- Advanced Options
- Buttons: Cancel, Done

The background shows the report configuration page for "No Info Hub Account". The "Synchronize Nightly with Report" dropdown menu is highlighted with a red box, showing the selected option "No Info Hub Account". Other visible fields include:

- Name \***: No Info Hub Account
- Established On**: [Calendar icon]  Show When Unsubscribing
- Description**: [Text input field]
- Meeting Time Description**: [Text input field]
- Partner**: [Text input field]
- Default Term (Months)**: [Text input field]
- General Settings**:
  - Is Active
  - Synchronize Contacts ⓘ
  - Disallow Opt Out ⓘ
- Public Display Options**: [Text input field]

# Email: Targeted Emails

Edit Email Template < 5 of 5 > ✕

**Name\***  **Description**

**Category\***

**Subject\***

**Template Text\***

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

**Insert Merge Field**

Hello **{{ Contact Name }}**

We are thrilled to share with you how you can use your membership with us to network, view member only events, share your contact information with other members for networking, access vital resources, use our site to advertise news, events, deals and recruit new employees!

[Create your login here](#)

[Login here](#) and make sure your contact profile is complete and update-to-date so others can successfully connect with you. Explore the site and have fun taking advantage of special members only access.

- Search the directory listing - your contact information and our other members are available in the "members only" hub.
- Personalized member listing page - included in the directory is your own information page on the website which can include a description area, location, logo, photos and contact details based on your membership level.
- Resources- being part of our association includes access to key sites, documents and other information

You can use an existing system default email template or create your own. (We do recommend you customize it to your organization's specific Info Hub implementation!)

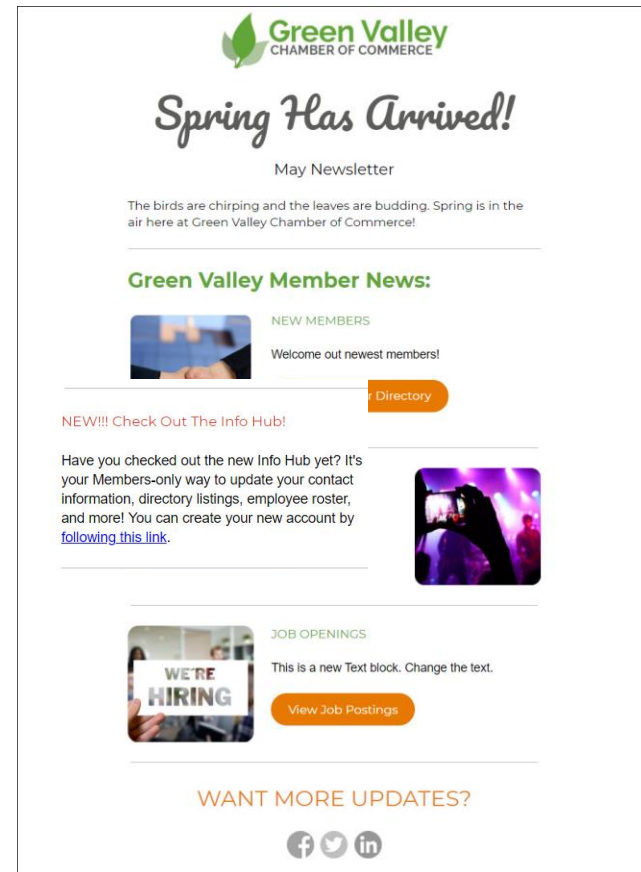
GZ Knowledge Base:  
[Edit a Default Email Template](#)

# Option 2: Newsletter



# Newsletter

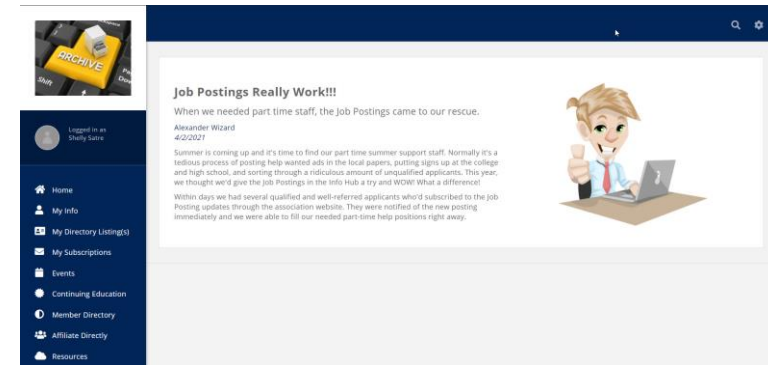
Using the method of your preference for your newsletter- GrowthZone's default email editor, GrowthZone's Email Designer editor, or a third-party communication solution such as Constant Contact or MailChimp- craft your newsletter to promote your Info Hub!



# Newsletter

Ideas to possibly include in your newsletter:

Include a member's success story of how the Info Hub has benefited them. Hot Deals and Job Postings almost always make an impact. Link to a blog post or news article!



Adding a short screencast “how-to” video on updating a member profile via the Info Hub can be a simple way to pique their interest.

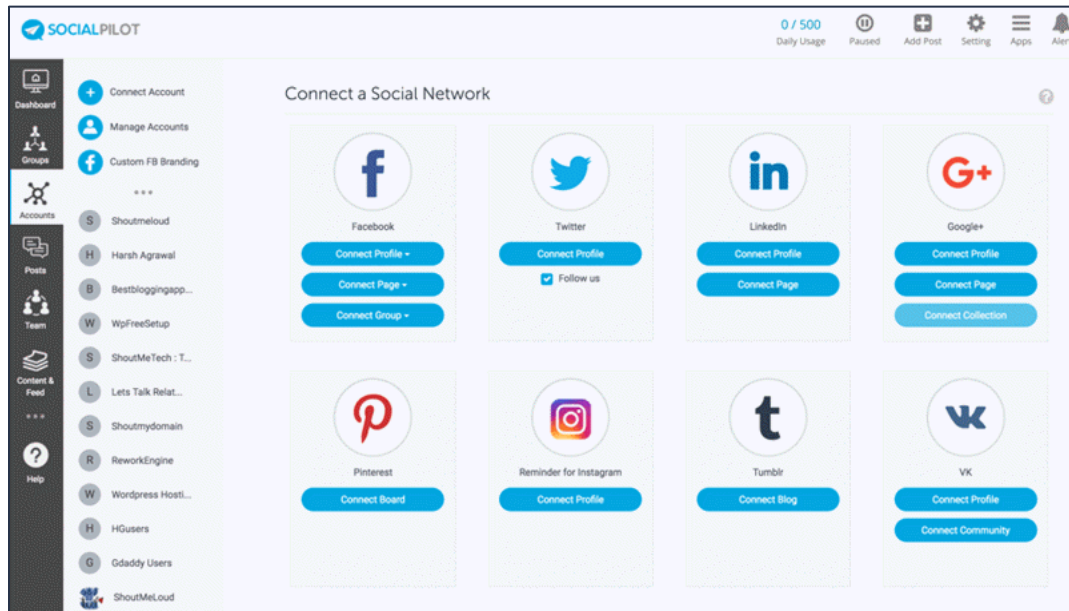
# Option 3: Social Media

# Social Media



Use visuals in social media updates. A simple image with basic text can often be more effective than a straight text post and is much more likely to capture members' attention and spark their interest.

# Social Media



Schedule regular social media posts about your software.

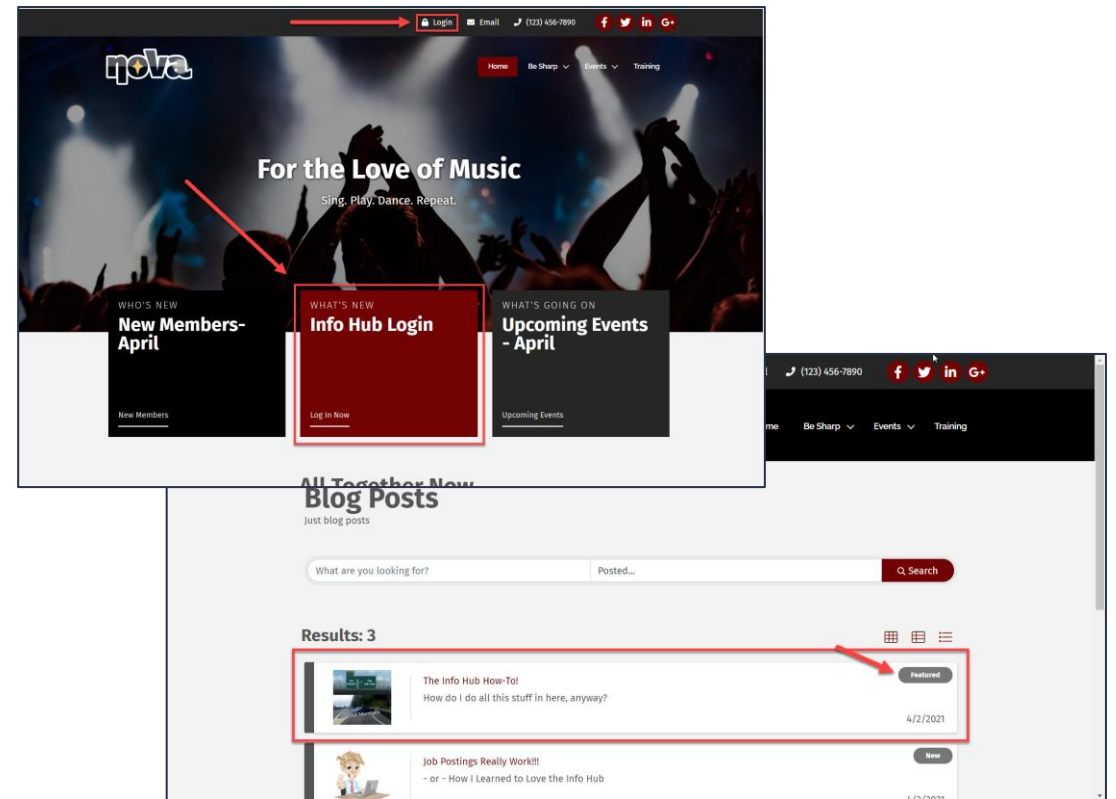
Promote Hot Deals and Jobs on social media regularly to drive curiosity.

Post about it until you get member complaints – then you'll know they “get it.”

# Option 4: Website

# Website

Keep information about the Info Hub at the forefront of your website. Remember, even though the website and software has launched (and you're ready to move on to something else), it's all new to them and will take a while to sink in and become routine.



# Website

Embed a screencast video with a very basic “how-to” in order to ease any trepidation on logging in.

The screenshot shows a member portal interface. On the left is a dark blue navigation sidebar with a top section featuring a yellow 'ARCHIVE' keycap icon. Below this, it shows the user is logged in as 'Shelly Satre'. The sidebar menu includes: Home, My Info, My Directory Listing(s), My Subscriptions, Events, Continuing Education, Member Directory, Affiliate Directly, and Resources. The main content area has a dark blue header with search and settings icons. The main body contains a welcome message: 'Welcome to your member connection and resource center!' followed by instructions on how to use the Directory and register for events. It also provides contact information for Shelly Satre. A central video player is embedded, showing a 'The Info Hub Tour' with a play button. To the right, there are two sections: 'UPCOMING EVENTS' with a list of events (Summer Bash 2021, 2021 Golf Tournament, TEST NIBA 2021, Fall Bash 2021 Fun Run, 2022 Golf Tournament) and 'ACCOUNT BALANCE' showing \$0.00 with a 'Go to Billing' button.



# Option 5: Events

# Events



Every communication about events should include a link to login and directions to register and pay online. By doing this, you're gradually teaching members to rsvp online via the Info Hub.

# Events

- Provide a five-minute Info Hub training on one Info Hub feature before the keynote. If it's done effectively, your participants won't even realize they're learning (or being asked to change).
- This is also a great time to promote Hot Deals and Job Postings.
- Have a prize drawing for everyone who registered for the event via the Info Hub.



# Bonus Option: Marketing Automation

# Bonus Option: Marketing Automation

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If you have the Marketing Automation module, you can build on the steps used in the “Targeted Emails” option and use workflows to automate the sending of messages to members who have not created their Info Hub Accounts.

**How to set up a workflow to prompt members to create accounts:**

# Bonus Option: Marketing Automation

The screenshot shows the 'User Account Report' interface. At the top, there are filters for 'Access Level Type', 'Access Level', and 'Account Created Within'. Below these are 'Membership Type' and 'Membership Status' (set to 'Active'). A 'Has Account' checkbox is also present. The 'Additional Criteria / Filters' section is expanded. Under 'Display Options', 'Fields to Display' includes 'Contact Name', 'Account Username', 'Contact First Name', and 'Contact Last Name'. 'Summarize By' is set to 'H' and 'Display Mode' is 'Detail'. A 'RUN REPORT' button is visible. A context menu is open over the 'RUN REPORT' button, listing options: 'Export as PDF', 'Export as Excel', 'Export Summary as Excel', 'Export Summary as PDF', 'Email Report', 'Add to List', 'Mailing Labels', 'Save As New Report...', and 'Add as Favorite Report'. The 'Add to List' option is highlighted. A dialog box titled 'Add Report Add to List' is open, showing a 'List/Committee' dropdown with 'No Info Hub Account' selected. It includes checkboxes for 'Replace existing contacts' and 'If Organization, add primary contact instead'. 'Cancel' and 'Done' buttons are at the bottom.

- Set up your User Account Report to find active members without an account and save as a new report
- Use the Add to List function; create a “No Info Hub Account” List (this will overwrite the list with current results every night)

# Bonus Option: Marketing Automation

The image shows two screenshots of a software interface. The top screenshot is titled "No Info Hub Account" and shows a form with fields for Name, Category, Established On, Description, Meeting Time Description, Partner, and Default Term (Months). The bottom screenshot is titled "No Info Hub Accounts Campaign" and shows a form for configuring a workflow. It includes fields for Name and Description, a "Workflow Timing" section with "Weekdays Only" checked and "Start Time" set to 8:00 AM and "Not After Time" set to 5:00 PM, and a "Workflow Participants" section with "No Info Hub Account" selected. Red boxes highlight the "Synchronize Nightly with Report" checkbox and the "Workflow Participants" dropdown in the bottom screenshot.

- Mark your new list to sync nightly with your “No Info Hub Account” report
- Add a New Workflow for “No Info Hub Account”
- Add the “No Info Hub Account” list to workflow
- Add desired steps and Activate the Workflow

# Bonus Option: Marketing Automation

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- As existing active members create accounts they will drop off the report -> be removed from the list -> be removed from the workflow.
- New active members will show up on the report, be added to the list, enter the workflow, and as they create accounts they will drop off the report -> be removed from the list -> be removed from the workflow.



# Bonus Option: Marketing Automation

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- You could also set up a secondary workflow for members that HAVE set up their Info Hub accounts, walking them through all the features of the Info Hub, using the same process. When the member creates an account, they show up on the report, are added to the “Welcome to the Info Hub” list/workflow, and they would begin receiving those messages.

# Bonus Option: Marketing Automation

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GZ Knowledge Base:

Marketing Automation

Marketing Automation Use Cases

# Questions?

# Training and Support

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## **Customer Service Hours:**

**Phone:** 7 a.m. – 5 p.m. CT (Monday, Tuesday, Thursday, and Friday)

800.825.9171, Option 4, then Option 2

**Chat:** 7 a.m. – 6:45 p.m. CT (Monday, Tuesday, and Thursday)

7 a.m. – 4:45 p.m. CT (Friday)

**Online Support Documentation:** [GrowthZone Knowledge Base](#) »

**Online Training Calendar:** [Training Event Calendar](#) »

**Live Chat:** [GrowthZone Support Portal \(chat on far right\)](#) »