



GrowthZone Realtor Edition Classroom Training

Day 1

9:00am – 9:30am Introductions

9:45am – 12 noon Membership & NRDS Integration Management - Cheri

- Overview Membership Types & Membership Rules
- Activate Membership
- Best practice steps for adding Primary/Secondary Office, Agents
- Troubleshooting using the Event Log
- Upgrading, Downgrading, Dropping Membership

12:00pm – 1:00pm Lunch

1:00pm – 4:30 pm Managing Events - Shelly

- Certifications - how it works
- Manage Code of Ethics
- Setup Event tied to Certification module
- Managing Event Registrations
 - Matching contacts
 - Move a registration from one event to another
 - Cancel registrations
- Manage/Monitor member certifications
- Reporting on events (especially certifications)

Day 2

9:00am – 10:15 am Forms & Surveys

- Create a Form
- Distribute Form
- View Form Responses

10:30 – 12:-00 Marketing Automation

- Set up a new member onboarding campaign

12:00pm – 1:00pm Lunch

1pm – 4:30 pm Managing Membership Dues Billing -

- Best Practices
- Run Upcoming Billing/Deliver Invoices
- Deliver Statements to Brokers
- Manage Unpaid Membership Dues
 - Resend invoices
 - Apply Late Fees
 - Suspend
 - Apply reactivation fee
 - Drop