# Creating, Managing, and Optimizing Groups in CM/MZ

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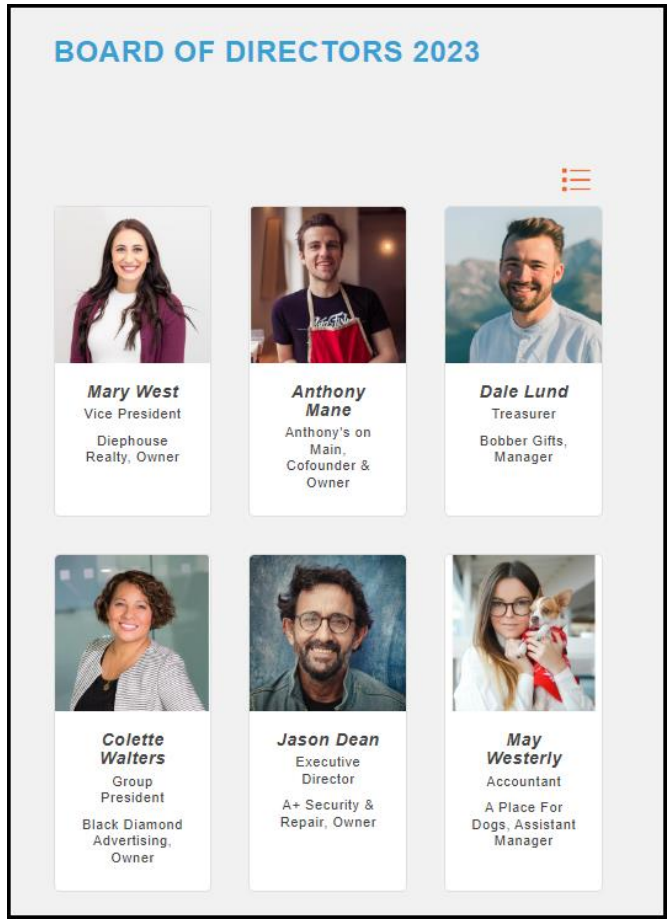
# Agenda

- Opt-out Disclaimer
- Creating Groups
  - Group Visibility
    - Public
    - Member Information Center (MIC)
  - Custom Fields
  - Group Types
- Managing Group Roster
- Managing Unsubscribes
- Group Fees
- Creating Groups from Custom Reports

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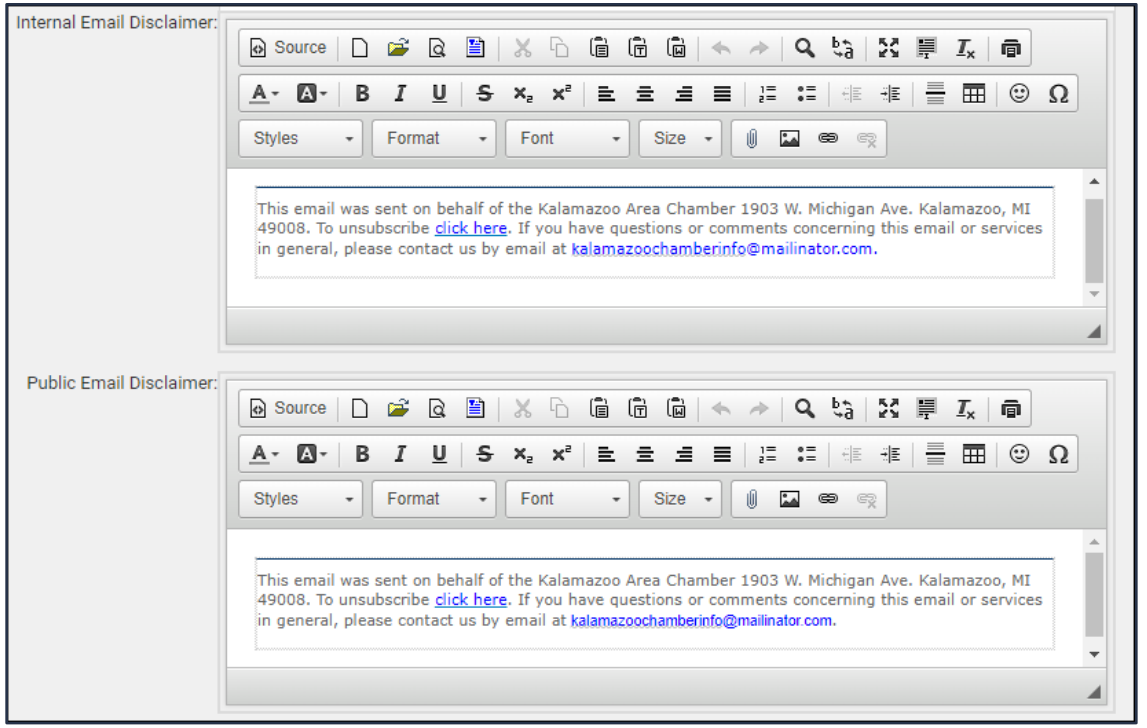
# Email Opt-out Message

- Opt-out message displays at the bottom of emails sent from groups
- Default messages have been configured for you
  - Can be customized
- Note: Don't modify unsubscribe link
- KB: Unsubscribe Options

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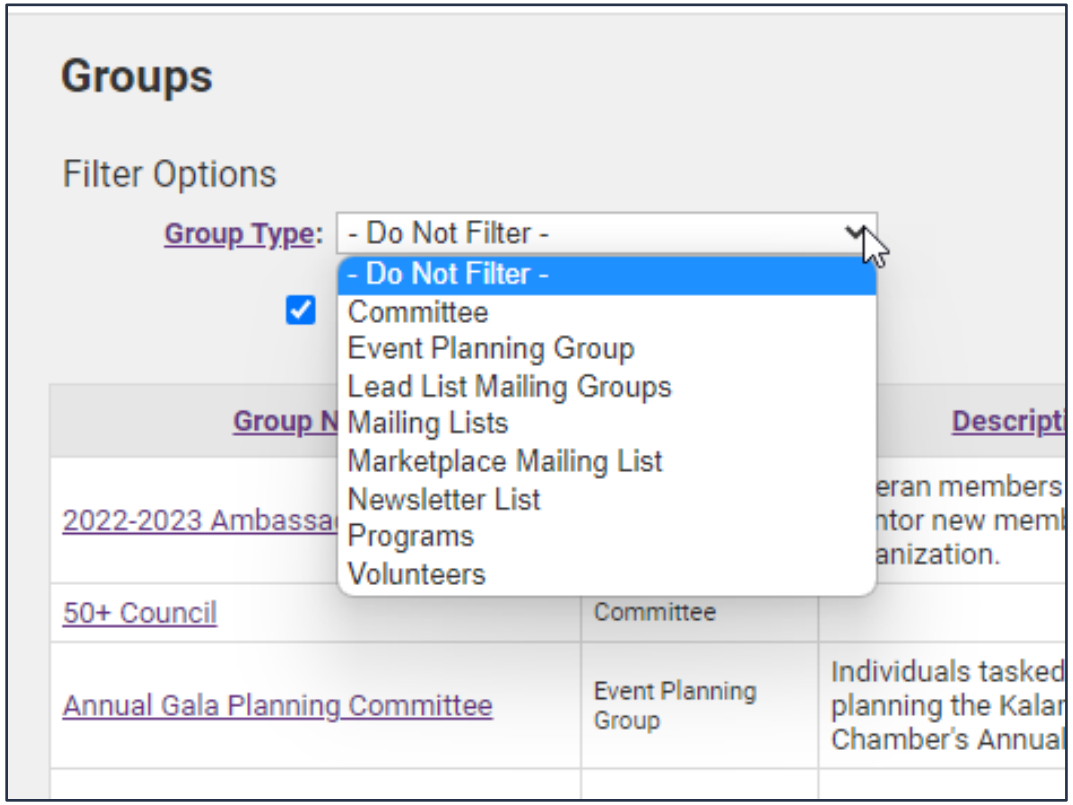
# Group Types

- Group types makes it easy to organize and filter
- Can create group types in advance or as needed
  - Committee
  - Mailing Lists
  - Email List
  - Event Planning Committee
- KB: Group Types

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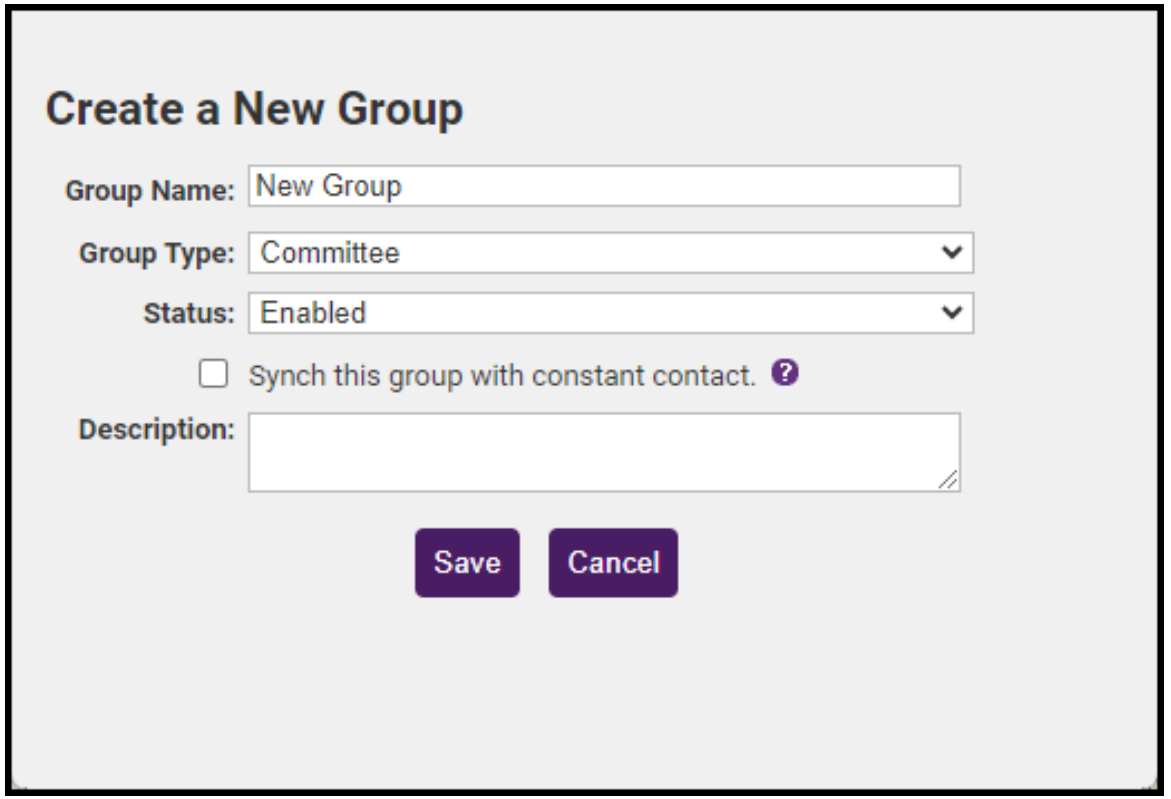
# Create a Group

- Different ways to populate group
  - Group module
    - Roster tab
  - Member module
    - Group Participation
  - Report module
    - Custom Reports
- KB: Create a Group

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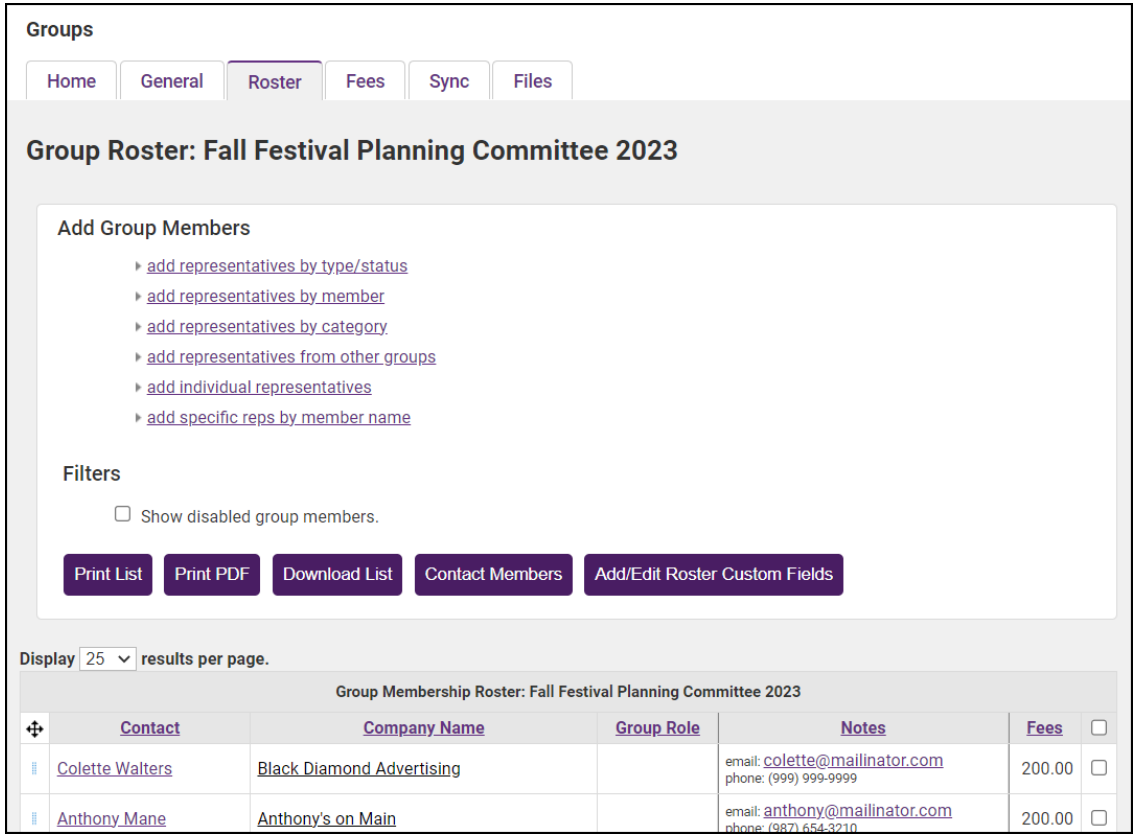
# Add Members to Group

- Add members by:
  - Type/status
  - Category
  - From other Groups
- Can be added from Group's Roster tab or from member's Reps tab
- KB: Add Reps to Groups

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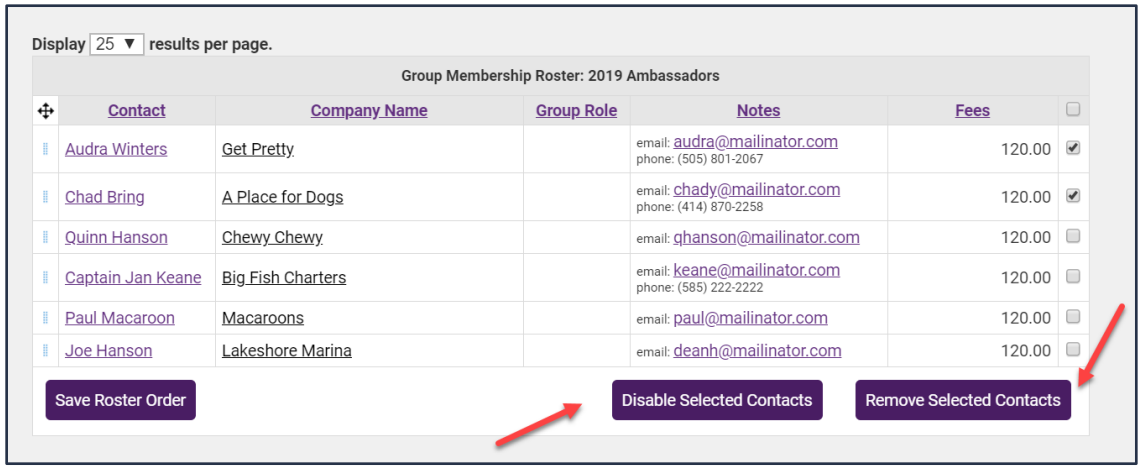
# Disable/Remove Reps from Group

- Disable a rep – they remain in group, but will not receive group emails
  - Recommended
- Remove a rep – permanently removed from group
  - No record of participation in group
  - Not recommended

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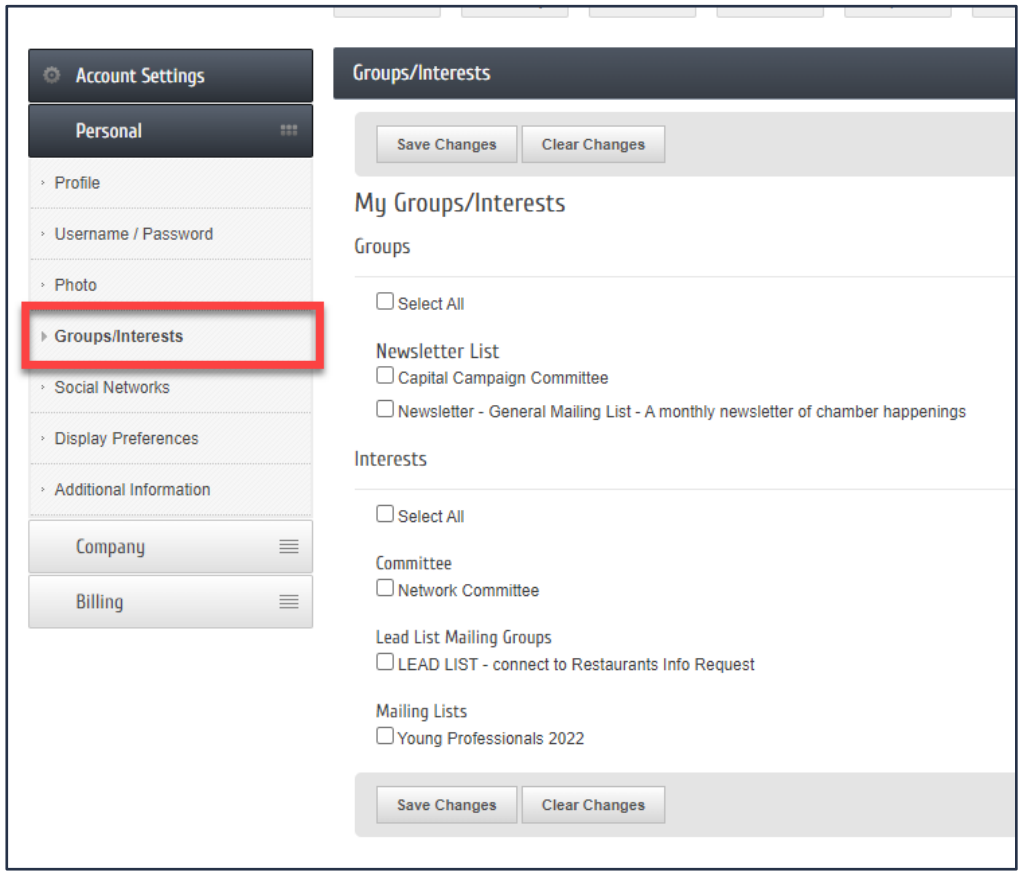
# Allow Members to Join Group via MIC

- Allow members to join or remove themselves from groups
- Able to select the desired groups when member logs into the Member Information Center (MIC)
  - Independently maintain participation
  - Keeps mailing lists up to date
- KB: Allow Members to Join Group

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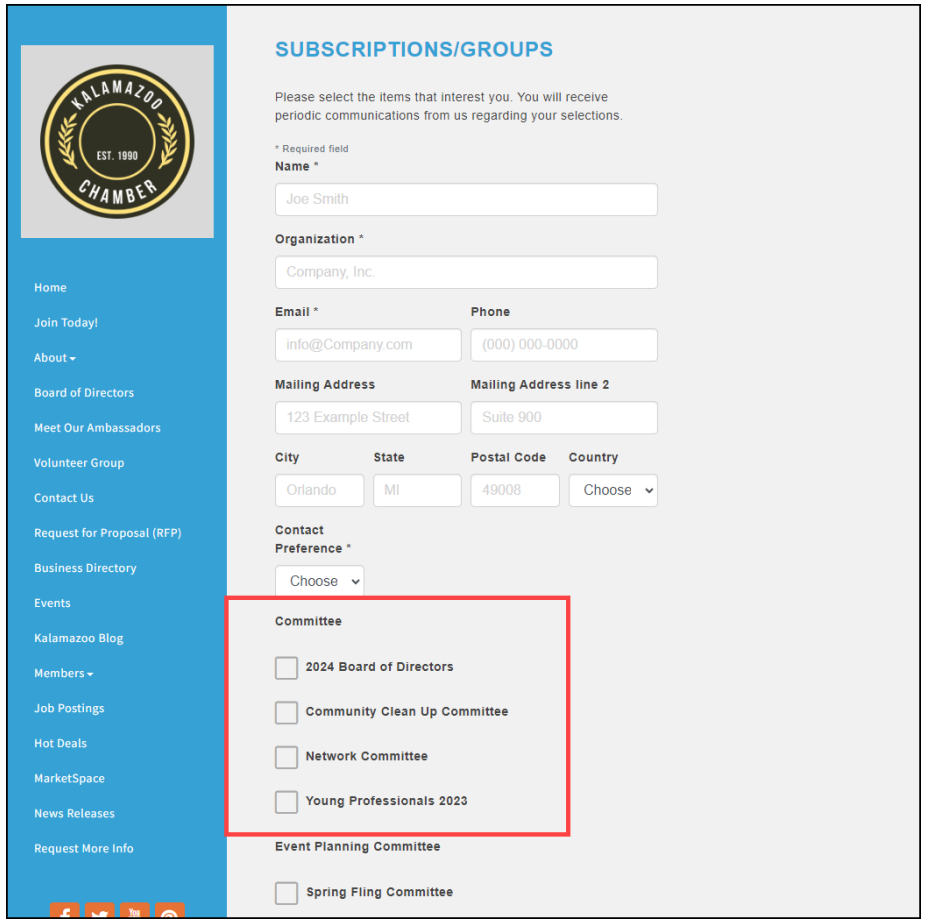
# Allow Public to Join Group

- Group can be marked to display on public website
- Can allow public to join group via public website
  - Any group can include this setting
  - Public module on website
- KB: Allow Public to Join Group

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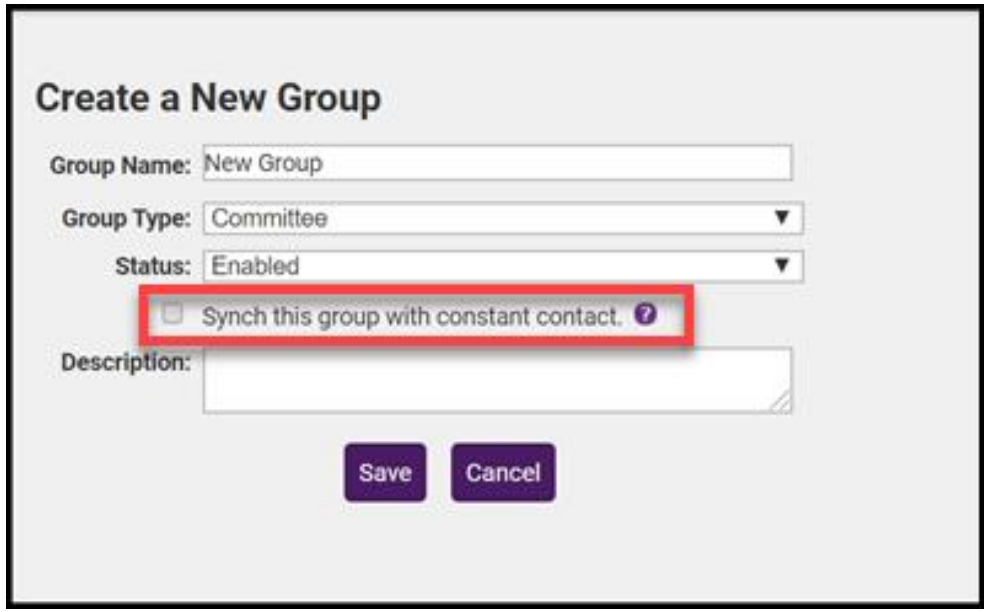
# Sync Group with Constant Contact

- Connect your Constant Contact account
  - Automate updates to your Constant Contact lists based on updates made in database
- Synchronization will occur between 1am and 6am CST
- Choose to synchronize any or all the following:
  - Automatically sync all active reps for active and courtesy members.
  - Automatically sync membership types daily
  - Automatically sync groups daily
- KB: Constant Contact Synchronization

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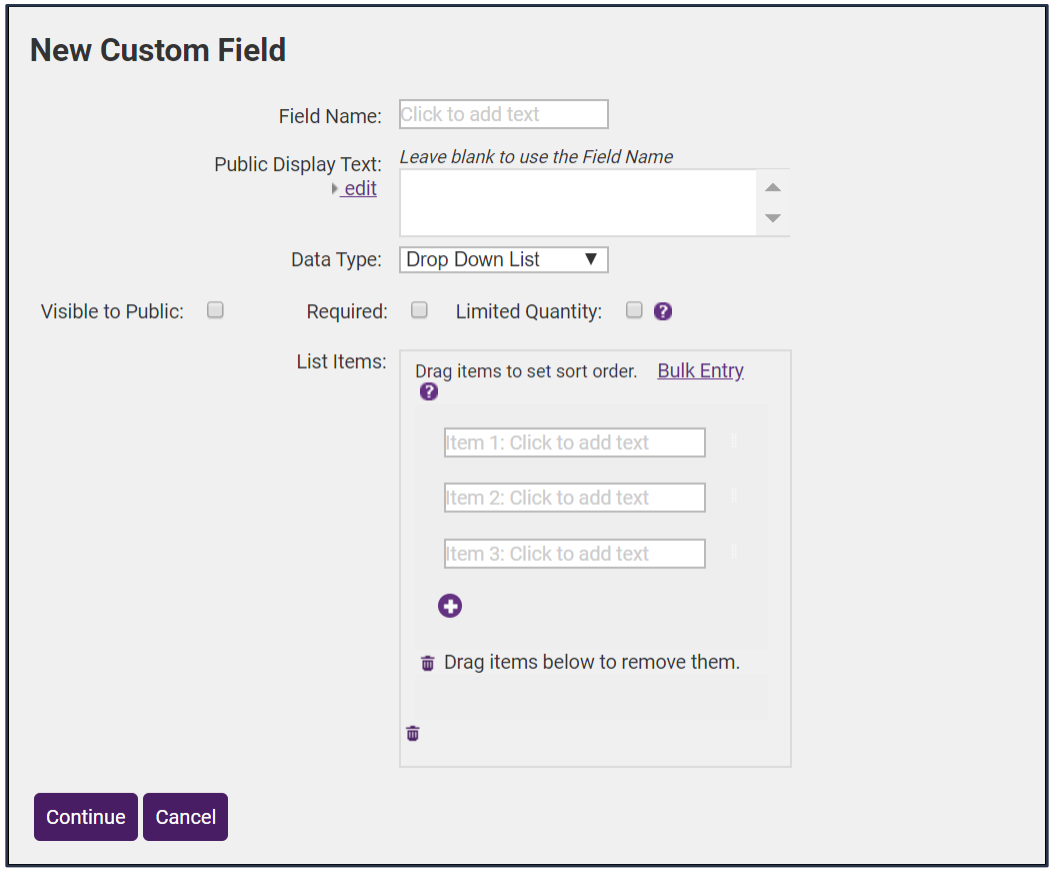
# Group Custom Fields

- Track information specific to representatives in your groups
- Group custom fields are for internal use only
- KB: Group Custom Fields

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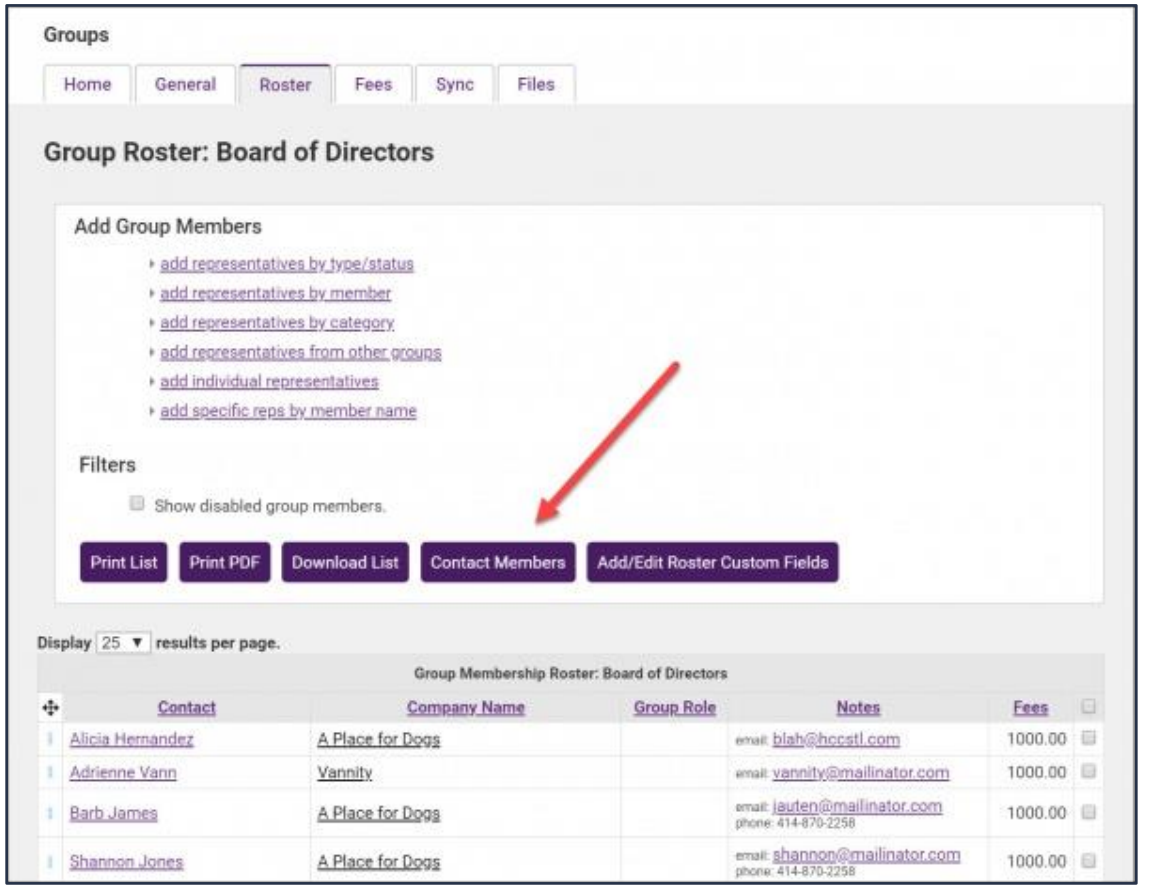
# Send Group Email

- Communicate with group members quickly
  - Board of Directors
  - Budgeting Committee
  - Volunteer Group, etc.
- Groups for mailing lists
  - Monthly newsletter
- KB: Send Group Email

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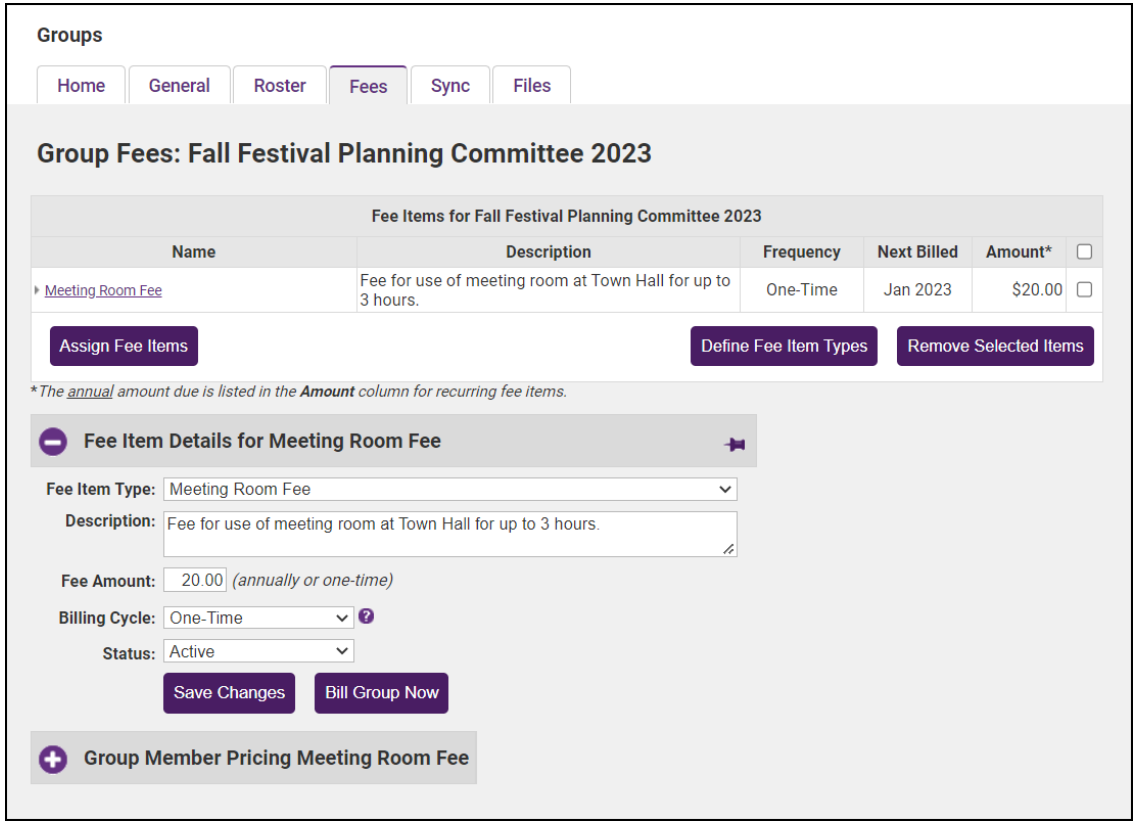
# Assign Group Fees

- Fees may be assigned to a group or to certain individuals within the group
  - Monthly luncheon fee
  - Use of conference room for group meeting
- Create groups to accommodate your billing needs
  - Or use groups already created
- KB: Group Billing

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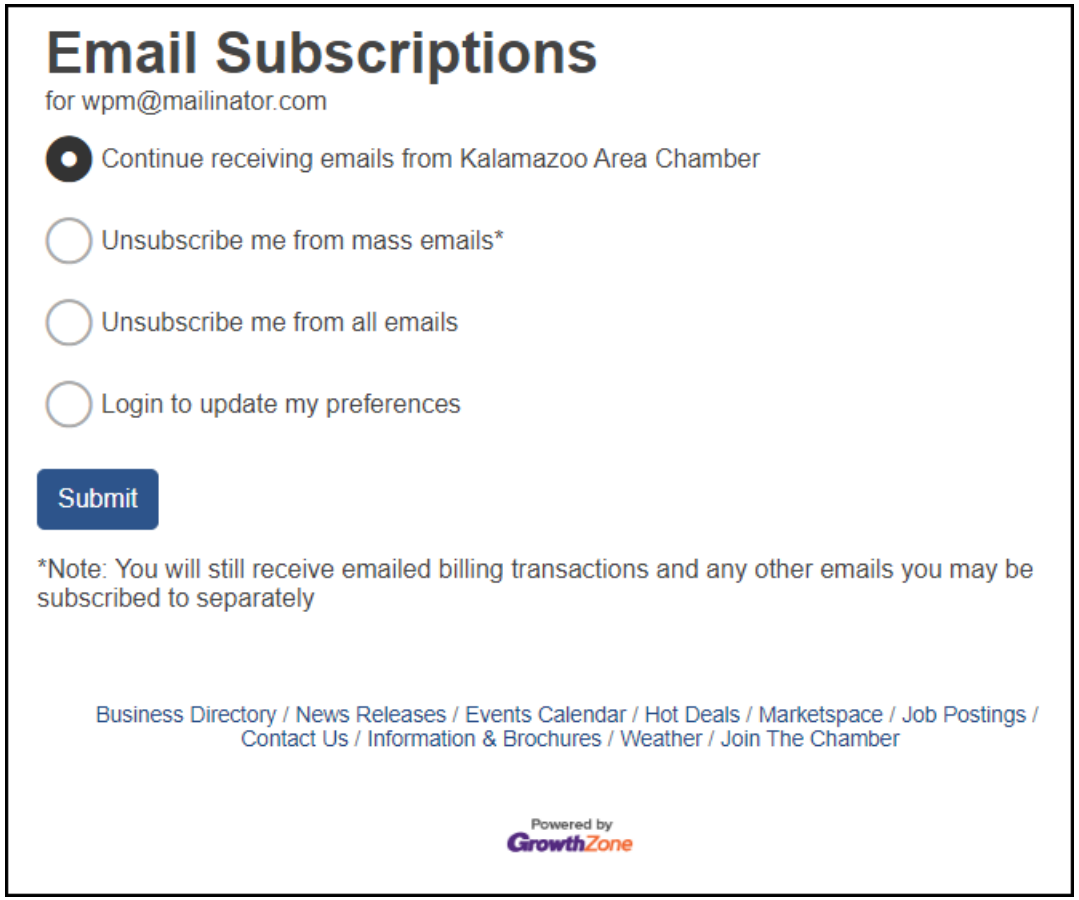
# Manage Unsubscribes

- Public disclaimer included in these emails, includes options for recipient
  - Opt-out of all mass emails
  - Subscribe to other lists
  - Continue to receive emails
- Member can customize which emails they'd like to receive
- KB: Managing Opt-outs

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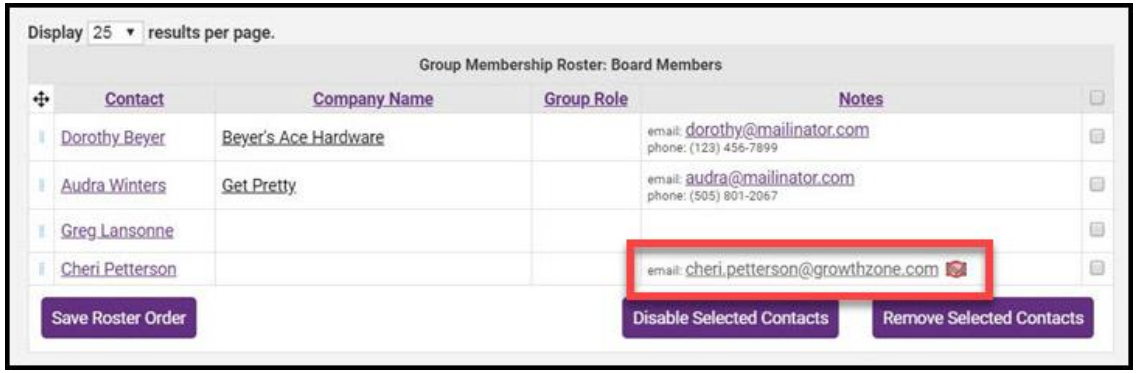
# Manage Unsubscribed Email Report

- View list of all members who have unsubscribed from emails
- Can re-subscribe them, if applicable
- KB: Manage Unsubscribed Emails Report

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# Training Resources

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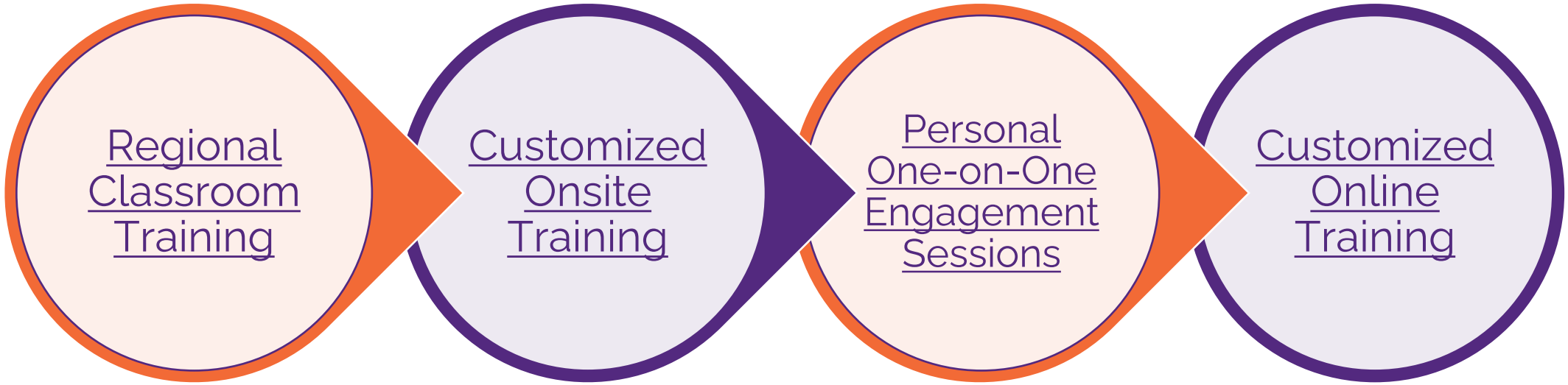
# Expanded Training Offerings

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# Questions?

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