

GrowthZone: Communication Basics

Agenda

Setting up Communications
Automated Communications
Sending/Scheduling Emails
Logging Calls & Notes
Reviewing Communications

Setting Up Communications

Creating your signature will save time when sending email correspondence. You can design your signature with both text & graphics, and easily select it when sending email correspondence.


[GZ Knowledge Base: Create your Signature](#)

The screenshot shows a window titled "Add/Edit Signature". It features a "Name" input field at the top. Below it is a "Signature Html" section containing a rich text editor toolbar with various icons for text formatting (bold, italic, underline, strikethrough, subscript, superscript, text color, background color, font size, bullet points, numbered list, link, unlink, image, table) and a text area with the placeholder text "Type something". At the bottom of the window are three buttons: "Delete", "Cancel", and "Done".

Communication Categories

Communication Categories provide a way for you to organize and filter email communications. Reports such as the **Communication Report** can be filtered by category to allow you to get a better understanding of the communications that are being sent

GZ Knowledge Base: [Configure Communication Categories](#)



Name	Color	Actions
Initial Contact		✕
Member Welcome		✕
Prospect		✕
Events		✕

Email Templates

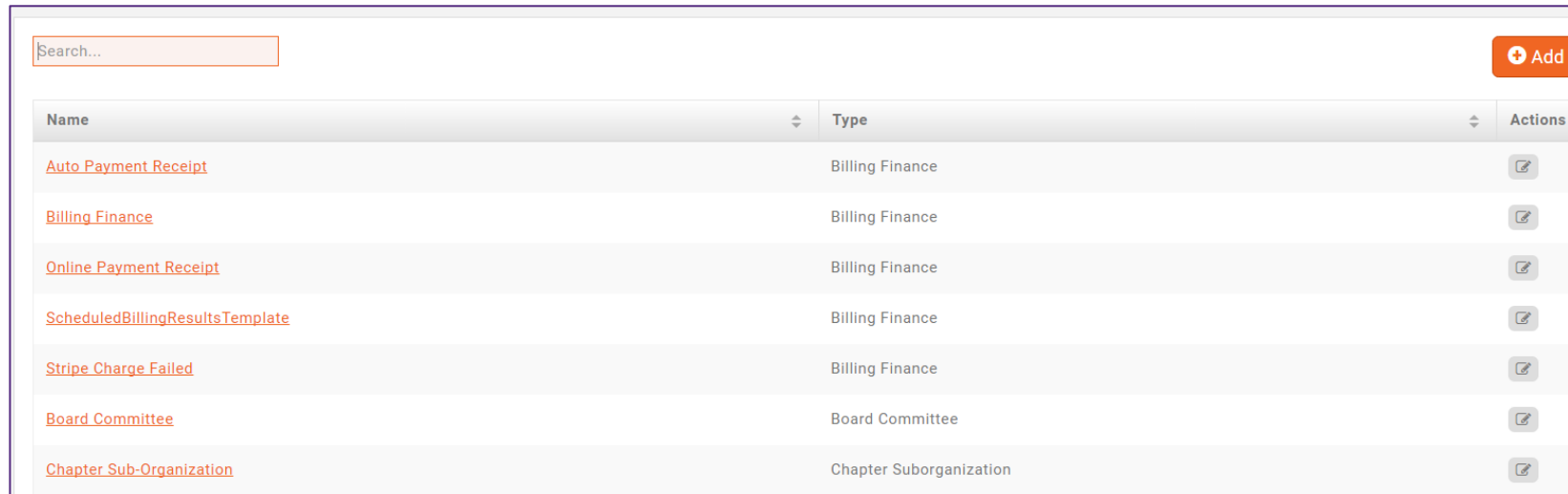
Email templates provide an easy way to respond to standard email tasks.

- *For example, you may wish to send a standard thank you email to all those who have attended an event.*
- *Email templates may also include database fields. For example, when sending an email for an event, the Event Name database field may be included in the email to customize the email to a specific event.*

GZ Knowledge Base: [Create and Manage Email Templates](#)

View/Create Templates

Setup > Communications > Email Templates



Name	Type	Actions
Auto Payment Receipt	Billing Finance	
Billing Finance	Billing Finance	
Online Payment Receipt	Billing Finance	
ScheduledBillingResultsTemplate	Billing Finance	
Stripe Charge Failed	Billing Finance	
Board Committee	Board Committee	
Chapter Sub-Organization	Chapter Suborganization	

Video:

[5 Email Templates You Should Customize \(And How To Do It\)](#)

Automated Communications

Automatic messages may be configured to be sent in response to certain actions

GZ Knowledge Base: [Automated Messaging](#)

Back to Setup

Automated Messaging

Search... Login Create/Reset Save

Category	Reason for message	Template To Send		Do Not Send
Login Create Reset	Staff Login Reset	Logins Reset		<input type="checkbox"/>
Login Create Reset	Email Member Login Info	Member or Representative Online Access		<input type="checkbox"/>
Login Create Reset	Email Member Login Added	Member or Representative Online Access Added		<input type="checkbox"/>
Login Create Reset	Email Member Login Instruction	ARCHIVE New Member Access		<input type="checkbox"/>
Login Create Reset	User Login Reset	User Password Reset		<input type="checkbox"/>
Login Create Reset	User Login Reminder	Username Reminder		<input type="checkbox"/>
Login Create Reset	Request Magic Link	-- Select a Template To Send --		<input type="checkbox"/>

Sending Emails

Setup > Communications > Email Settings

- Archive Email Address (GrowthZone vs. Outlook)
- Unsubscribe Settings

Archive Email Address	archive@membermanagementtraining.growthzoneapp.com
-----------------------	--

Unsubscribe Settings

Unsubscribe Message

B I U x_2 x^2 **A** **T**

This email was sent on behalf of **{{ TCDisplayName }}** located at **{{ TCADDRAddress1 }}**, **{{ TCADDRAddress2 }}**, **{{ TCADDRCity }}**, **{{ TCADDRStateProvince }}** **{{ TCADDRPostalCode }}**. [To unsubscribe click here.](#) If you have questions or comments concerning this email contact **{{ TCDisplayName }}** at **{{ TCEmailAddress }}**.

GZ Knowledge Base: [Email Settings](#)

Sending Emails/Monitoring Communications

GZ Knowledge Base: [Sending Emails](#)

The screenshot displays the 'Exotic Floral Boutique' profile page in the GrowthZone software. The 'Communication' tab is active, showing a list of messages. The interface includes a search bar, a 'Show only...' dropdown, and a 'Customize Results...' button. A filter for 'Contact: Exotic Floral Boutique' is applied. Two messages are visible in the table below.

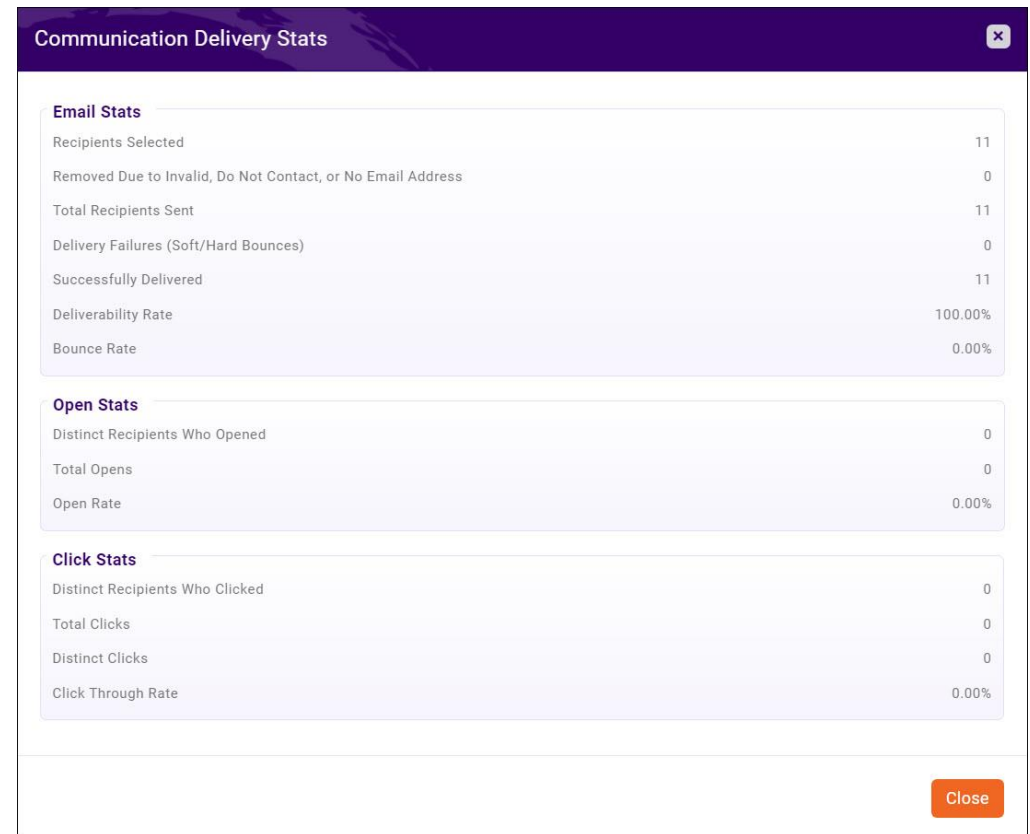
Date	Subject	From	To	Category	Actions
3/12/2017 6:14 PM	Other	Cheri Petterson	Marty McFly		
2/21/2017 3:43 PM	Membership Dropped	Cheri Petterson	2 Recipients		

Sending Emails/Monitoring Communications

Communication Delivery Stats will help you understand the effectiveness of your communications

This will allow you to gauge the success by looking at open rates, and allows you to check to see whether an individual recipient received/opened the message

GZ Knowledge Base:
[View Email Delivery Statistics](#)



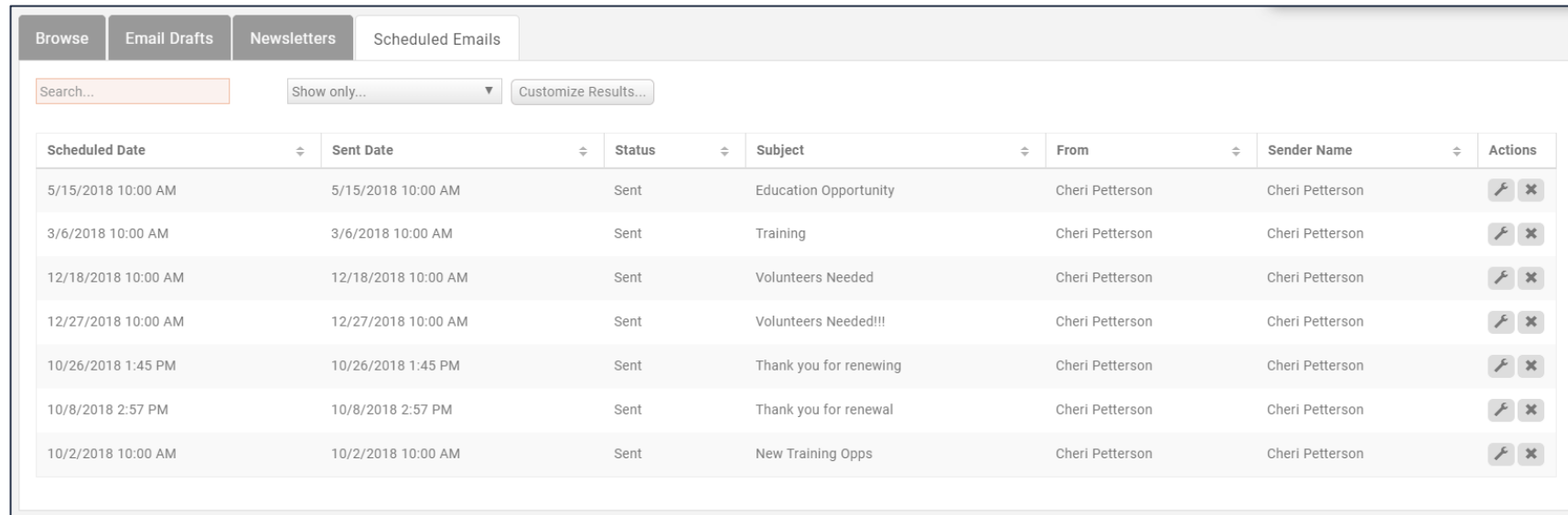
The screenshot displays a 'Communication Delivery Stats' window with three sections: Email Stats, Open Stats, and Click Stats. Each section contains a list of metrics and their corresponding values.

Section	Metric	Value
Email Stats	Recipients Selected	11
	Removed Due to Invalid, Do Not Contact, or No Email Address	0
	Total Recipients Sent	11
	Delivery Failures (Soft/Hard Bounces)	0
	Successfully Delivered	11
	Deliverability Rate	100.00%
Bounce Rate	0.00%	
Open Stats	Distinct Recipients Who Opened	0
	Total Opens	0
	Open Rate	0.00%
Click Stats	Distinct Recipients Who Clicked	0
	Total Clicks	0
	Distinct Clicks	0
	Click Through Rate	0.00%















Scheduled Emails

On the **Communications** module **Scheduled Emails** tab, you can view, edit and delete scheduled emails

GZ Knowledge Base: [View/Edit/Delete Scheduled Emails](#)



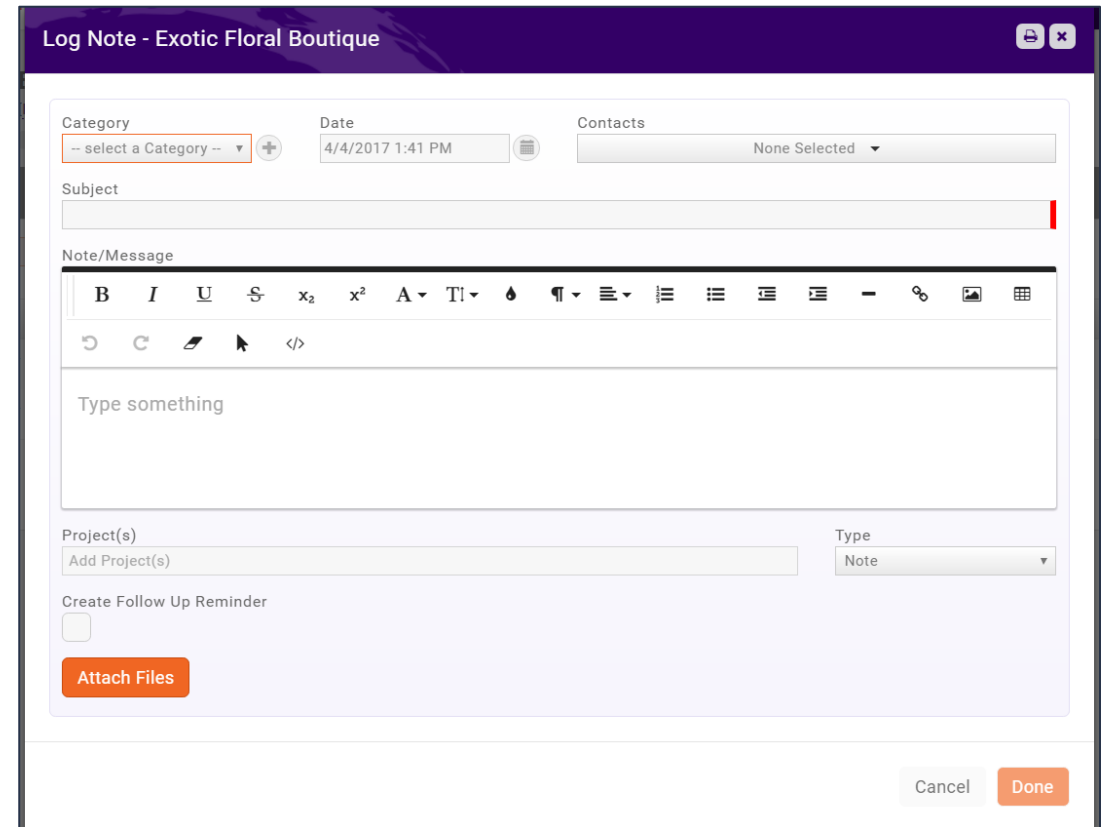
The screenshot displays the 'Scheduled Emails' tab in a software interface. It features a search bar, a 'Show only...' dropdown, and a 'Customize Results...' button. Below these is a table with the following data:

Scheduled Date	Sent Date	Status	Subject	From	Sender Name	Actions
5/15/2018 10:00 AM	5/15/2018 10:00 AM	Sent	Education Opportunity	Cheri Petterson	Cheri Petterson	 
3/6/2018 10:00 AM	3/6/2018 10:00 AM	Sent	Training	Cheri Petterson	Cheri Petterson	 
12/18/2018 10:00 AM	12/18/2018 10:00 AM	Sent	Volunteers Needed	Cheri Petterson	Cheri Petterson	 
12/27/2018 10:00 AM	12/27/2018 10:00 AM	Sent	Volunteers Needed!!!	Cheri Petterson	Cheri Petterson	 
10/26/2018 1:45 PM	10/26/2018 1:45 PM	Sent	Thank you for renewing	Cheri Petterson	Cheri Petterson	 
10/8/2018 2:57 PM	10/8/2018 2:57 PM	Sent	Thank you for renewal	Cheri Petterson	Cheri Petterson	 
10/2/2018 10:00 AM	10/2/2018 10:00 AM	Sent	New Training Opps	Cheri Petterson	Cheri Petterson	 

Logging Calls/Notes

Through your communications tab you can also log notes/calls and maintain that information within your database

GZ Knowledge Base:
Log Notes/Phone Calls



The screenshot shows a web-based form titled "Log Note - Exotic Floral Boutique". The form includes the following fields and controls:

- Category:** A dropdown menu with the text "-- select a Category --" and a plus sign icon.
- Date:** A text input field containing "4/4/2017 1:41 PM" and a calendar icon.
- Contacts:** A dropdown menu with the text "None Selected" and a downward arrow.
- Subject:** A text input field.
- Note/Message:** A rich text editor with a toolbar containing icons for bold (B), italic (I), underline (U), strikethrough (ABC), subscript (x₂), superscript (x²), font color (A), text color (T), bulleted list, numbered list, indent, outdent, link, unlink, insert image, and insert table. Below the toolbar is a text input field with the placeholder text "Type something".
- Project(s):** A text input field with the placeholder text "Add Project(s)".
- Type:** A dropdown menu with the text "Note" and a downward arrow.
- Create Follow Up Reminder:** A checkbox.
- Attach Files:** An orange button.
- Cancel:** A light gray button.
- Done:** An orange button.

Questions?

Training and Support

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 \(chat on far right\)](#) »