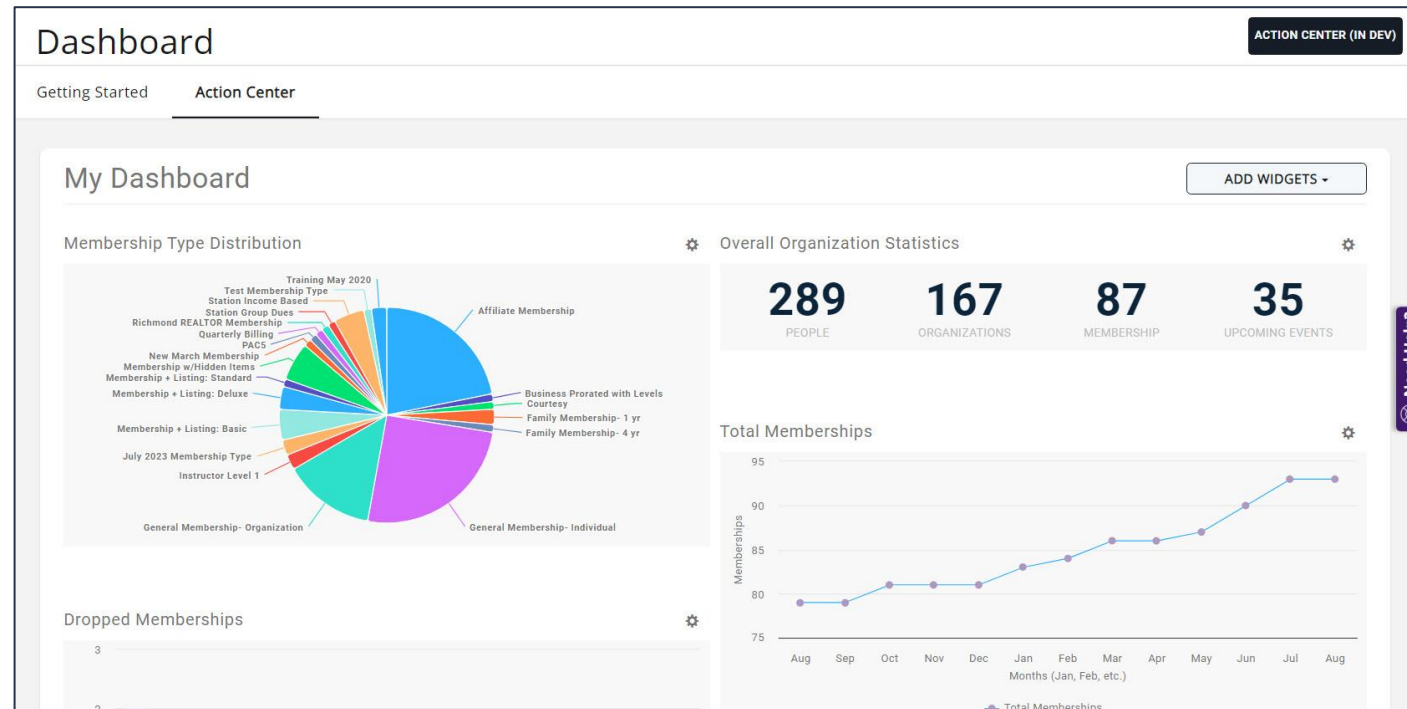# GrowthZone: Solution Overview

GrowthZone
smarter association software

Agenda

System Navigation

Overview of GrowthZone Modules

Overview

GrowthZone is the smart association software designed to help you:

  ❖ Grow your membership
  ❖ Retain and engage your existing organizations or individuals
 ❖ Do more with less time

Overview

Easy to use, and designed to manage all the day-to-day operations of your organization

Three Different Views:

- Staff/Database View
- Member View
- Public View

GrowthZone
smarter association software
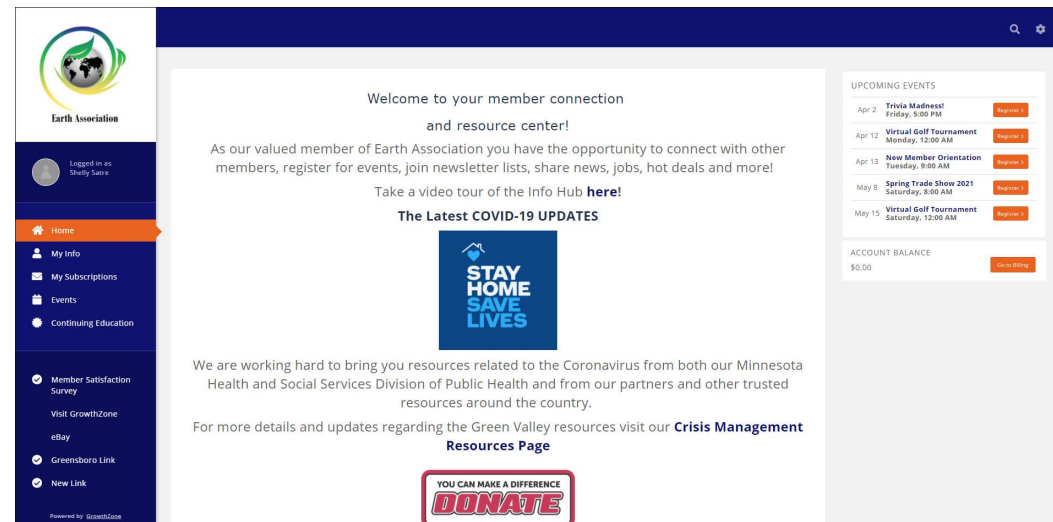
Overview – Staff View - Database

Where you will be able to manage all of your contacts and members, manage your events, generate and analyze reports, and work with the modules that you have selected
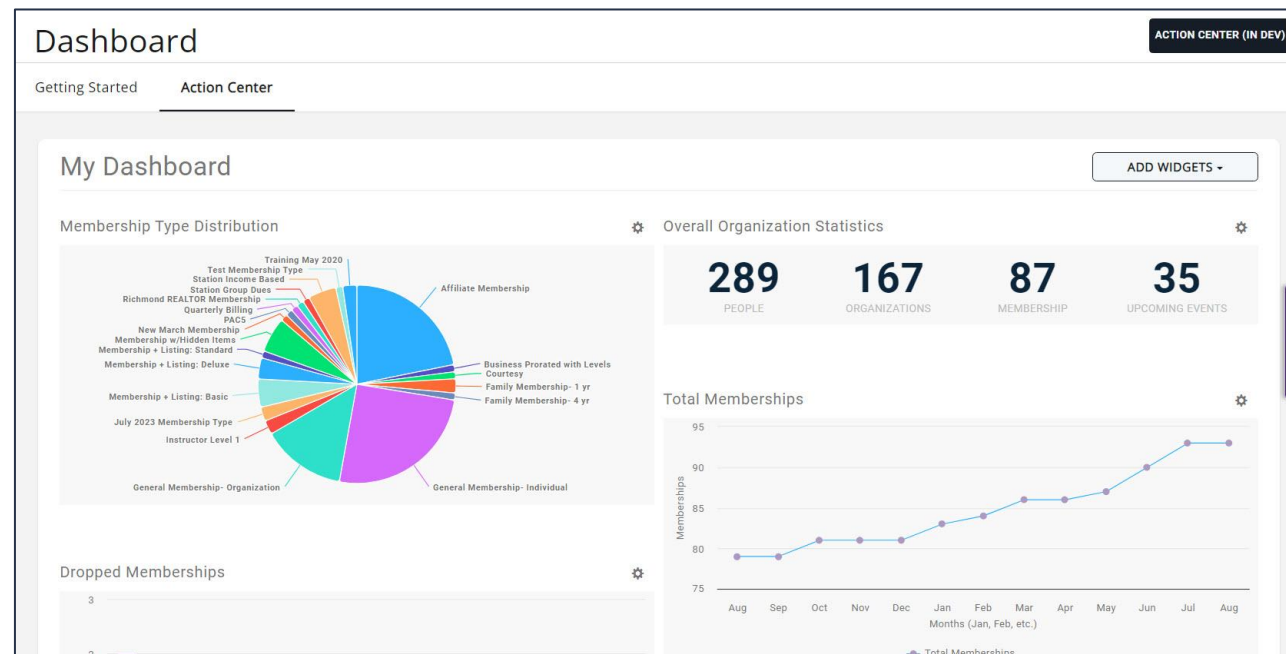
Overview – Member View - InfoHub

Members can
- Update own information (photos, directory listing, website, etc.)
- Manage their account and pay their bills
- Register for Events, enter New Events
- Enter Hot Deals, Member to Member Deals, & Job Postings...

Overview – Website – Public View

We can design a website for you or assist in integrating to your existing site.
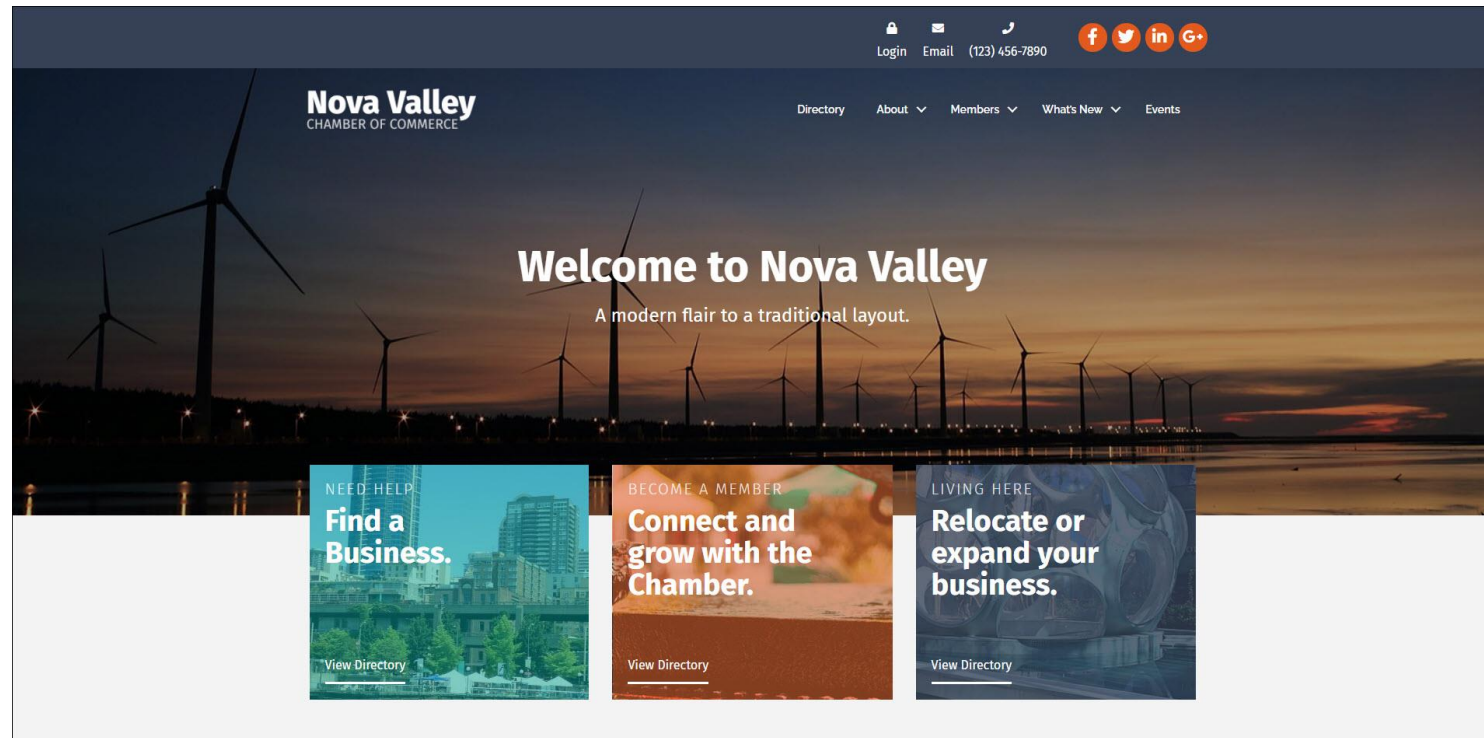
Staff View - Database

Logging In: https://growthzoneapp.com/login
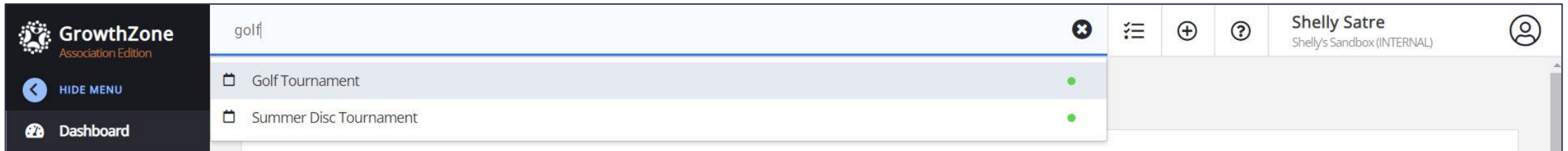
Staff View – Database Navigation

Header
Navigation Panel
Work Space
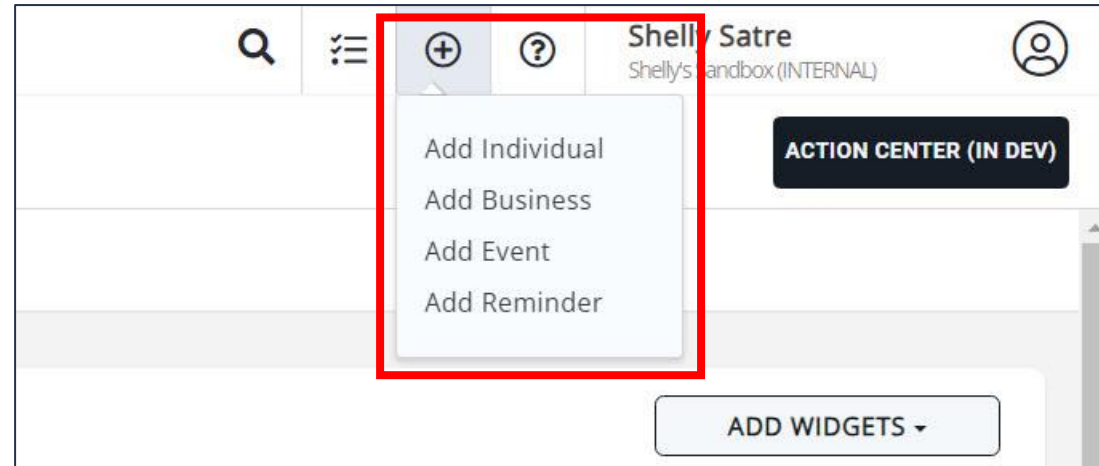Common Functions
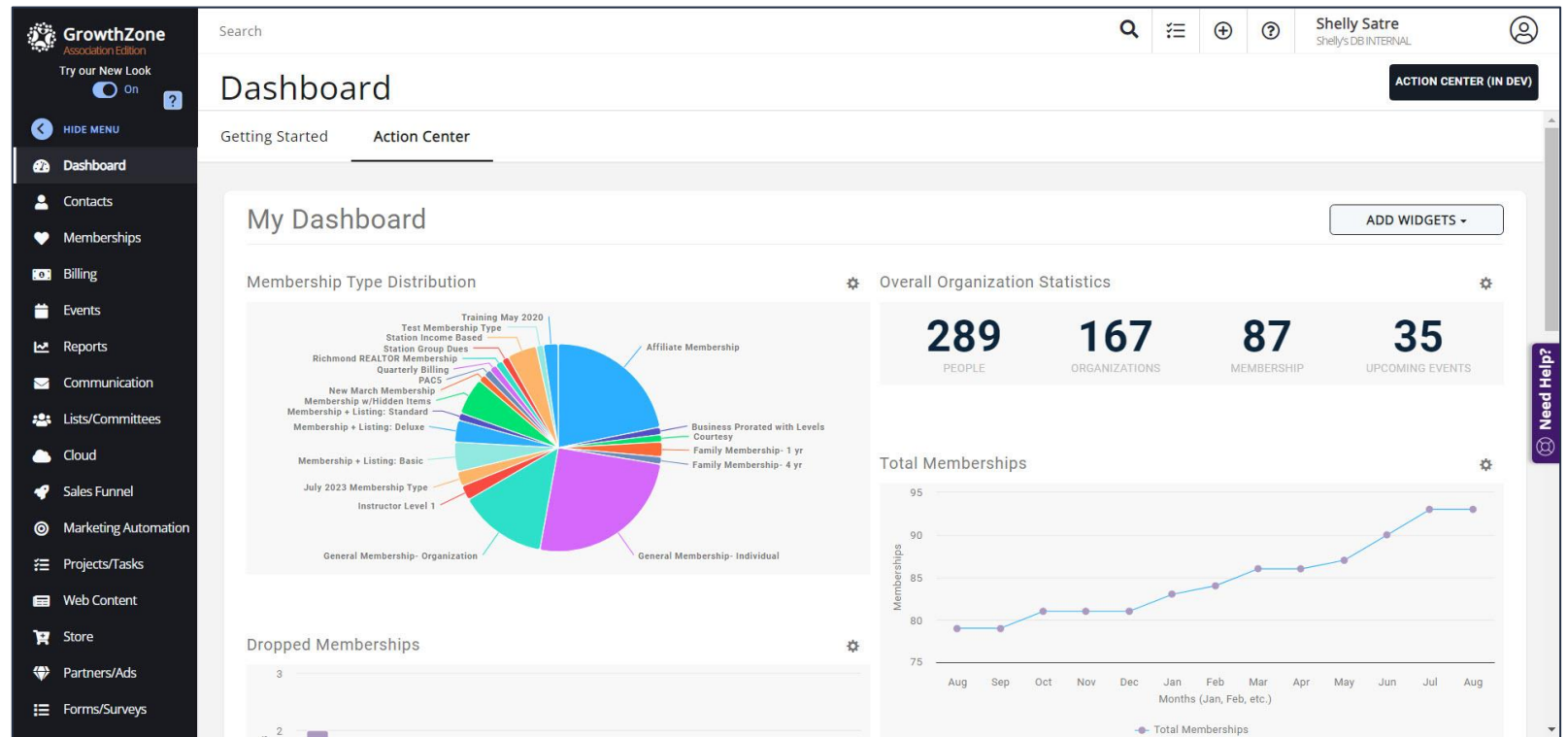
Software Navigation - Header

Search

- The Search option allows you to easily search for Contacts, Members or Events

Software Navigation – Quick Actions

Add Individual Contacts...

Add Business Contacts...

Add Events...

Add Reminders...

Software Navigation – Quick Actions

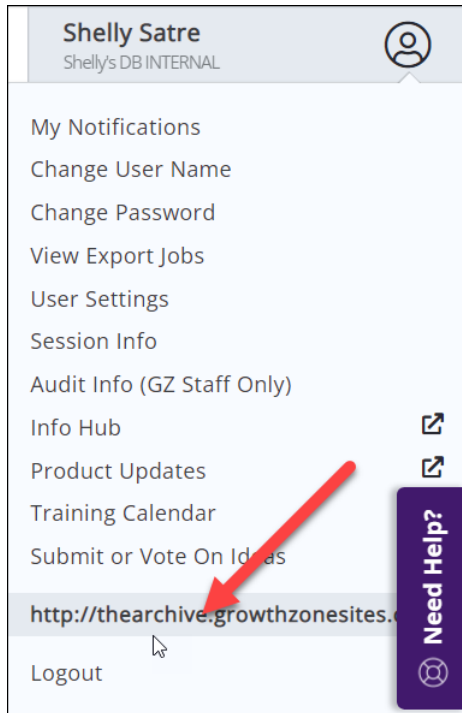## Example
Add Contacts - Organization

Software Navigation – Info Hub

Logged on staff users can access the Info Hub thru their menu:
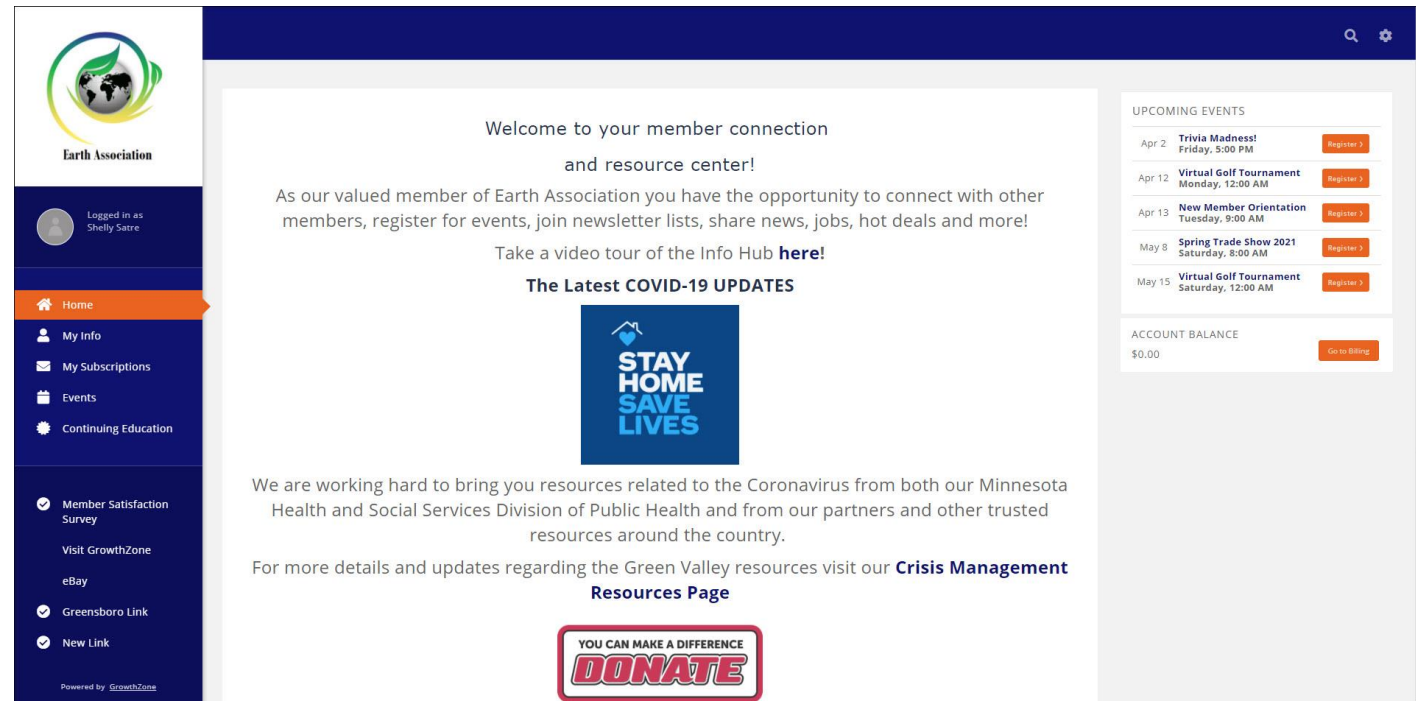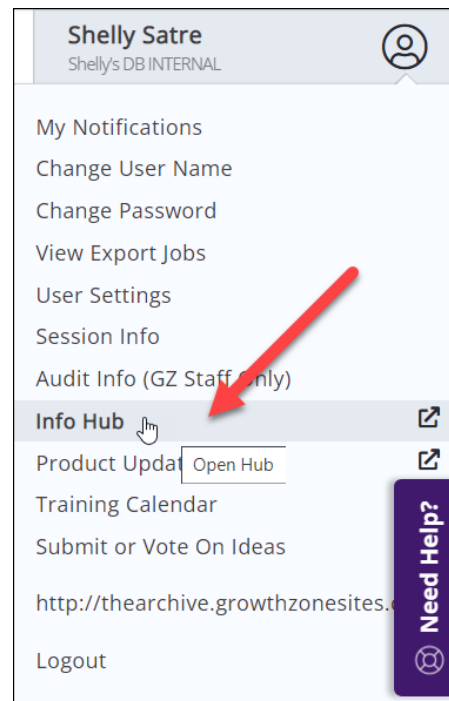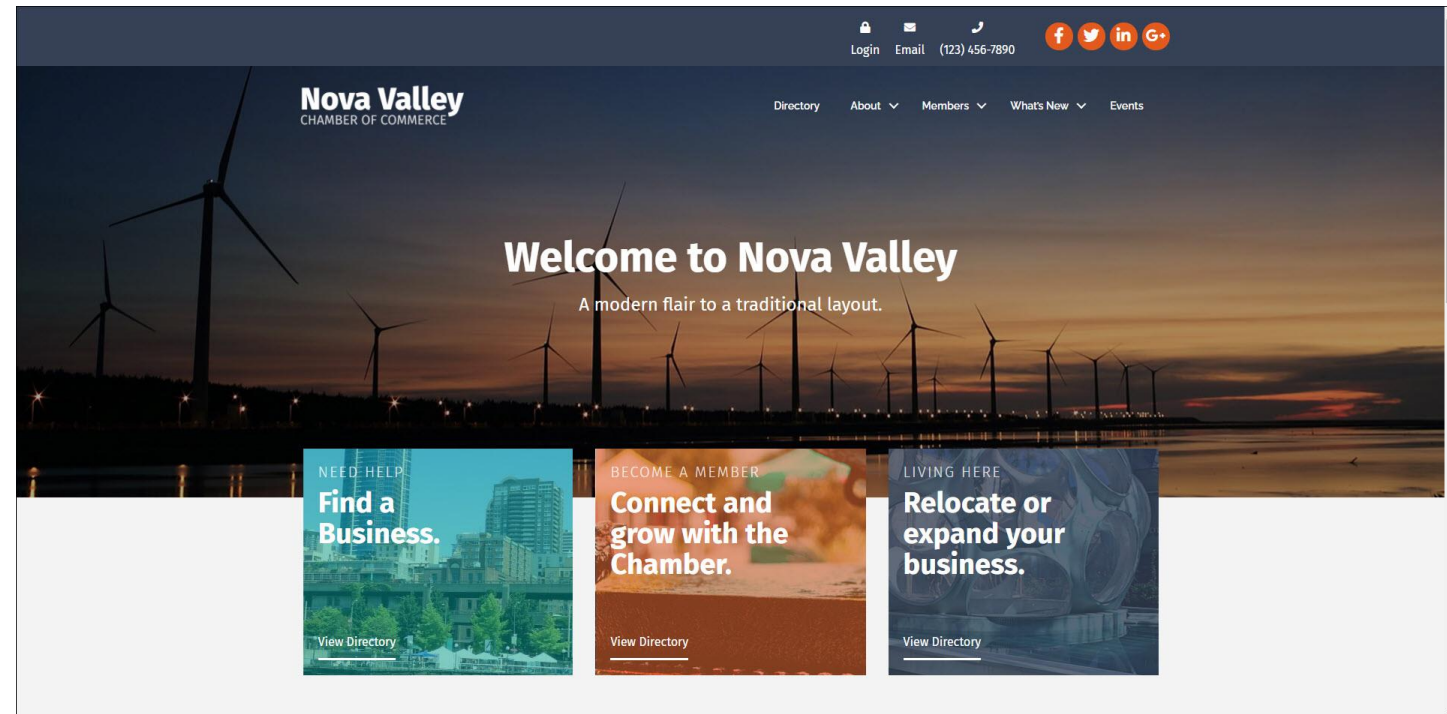
Software Navigation – Website

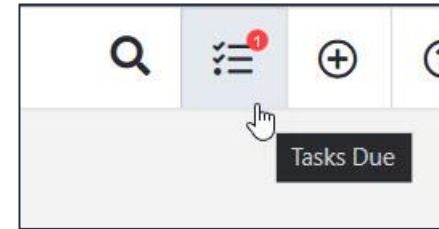Logged on staff users can access your website via their menu:

Software Navigation – Assigned Tasks

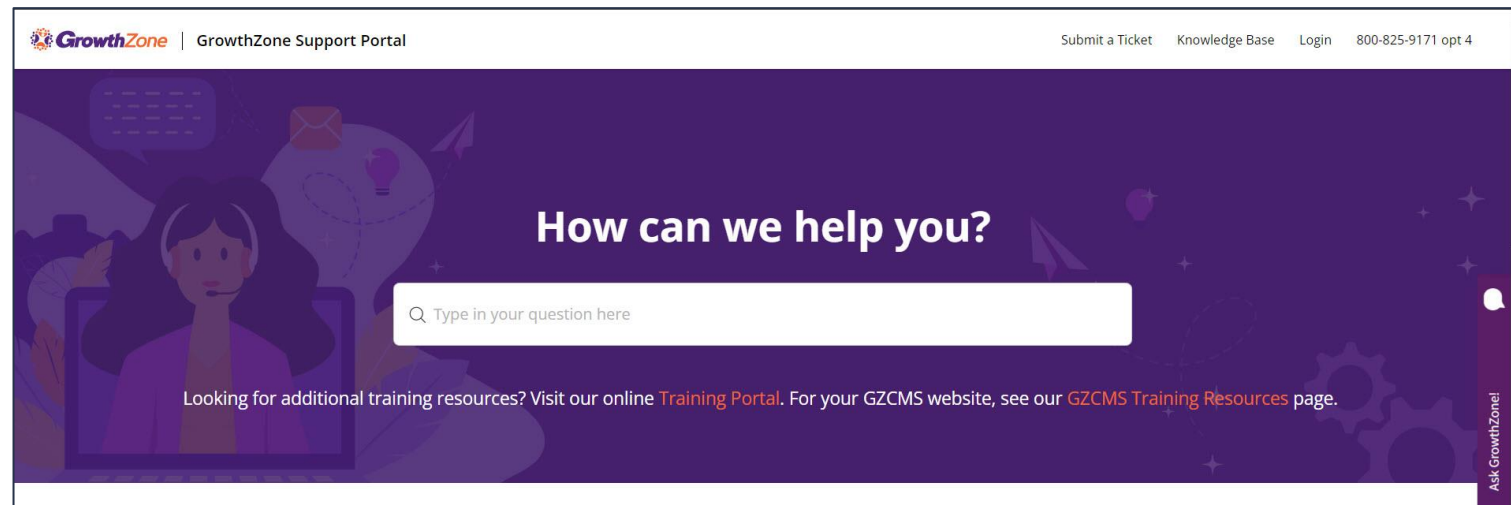Go to your list of Assigned tasks by clicking

Software Navigation – Help

Go to the online Knowledge Base/ticket portal:
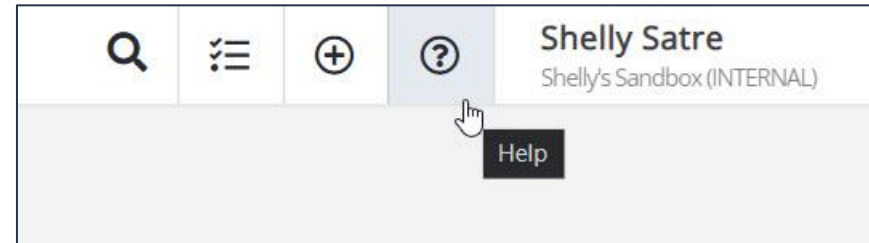
Search for articles, chat with Support, and submit a ticket all from one location!

# Software Navigation – Add'l Options

Options for the logged in staff member

- *Notifications*
- *Change User Name or Password*
- *View Export Jobs*
- *User Settings*
- *Session Info*

- Plus links to:
  - *Info Hub*
  - *Product Updates*
  - *Training Calendar*
  - *UserVoice*
  - *GZCMS website (if applicable)*
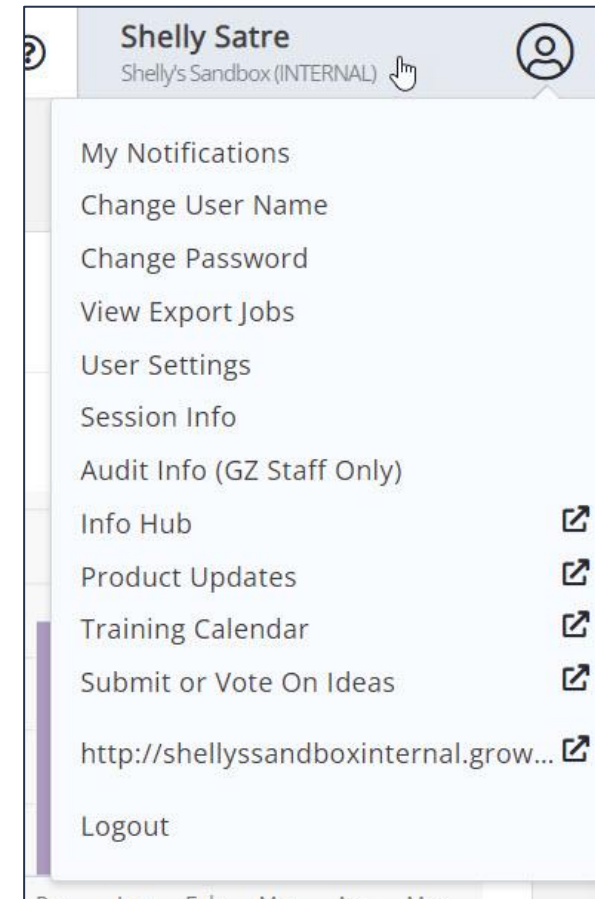
Navigation Panel

The Navigation Panel allows you to easily navigate to the module you want to work with
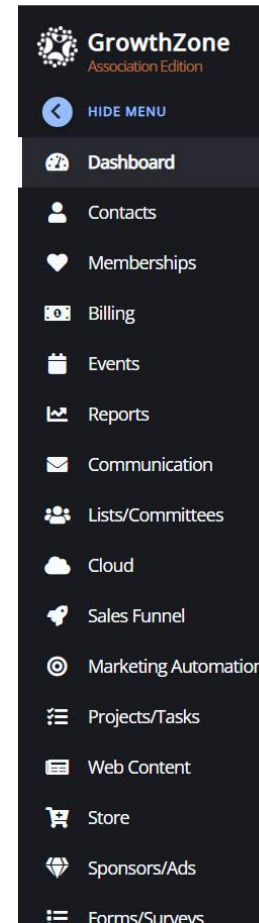
Workspace

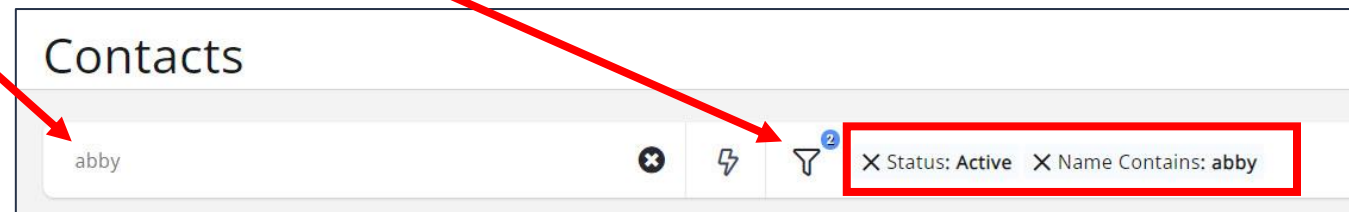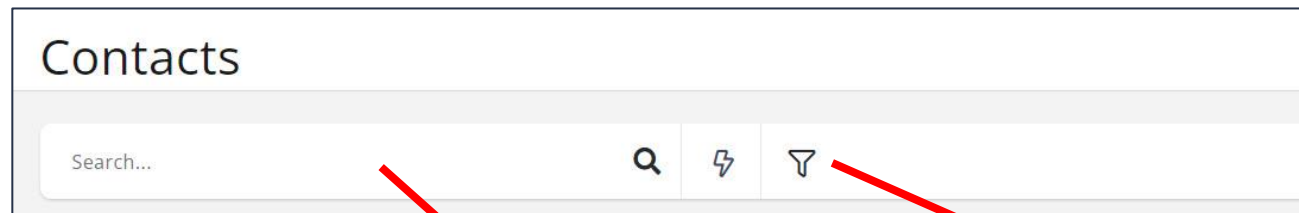When a module is selected in the Navigation Panel, details will be displayed in the workspace

Common Module Functions

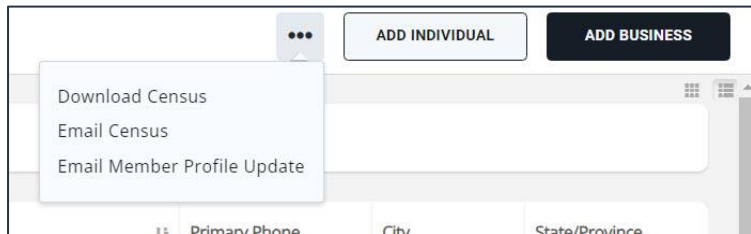Search Function – search functions are available throughout the software

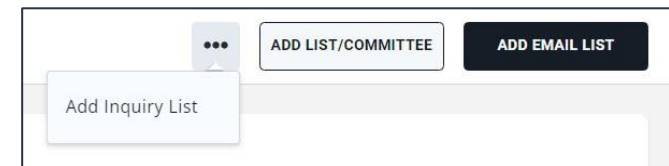- *Type ahead search*
- *Quick Filter*
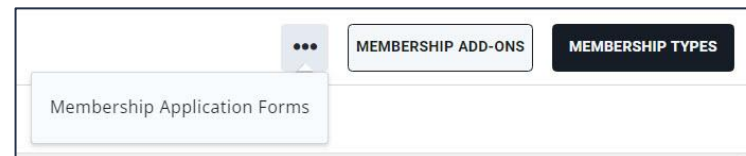- *Customize Filter*

Common Module Functions

Add

- *The module that you are using will dictate the options available*
- *The most commonly used options will be displayed on the button(s) in the upper right corner*

Contacts

Lists/Committees

Memberships

Common Module Functions

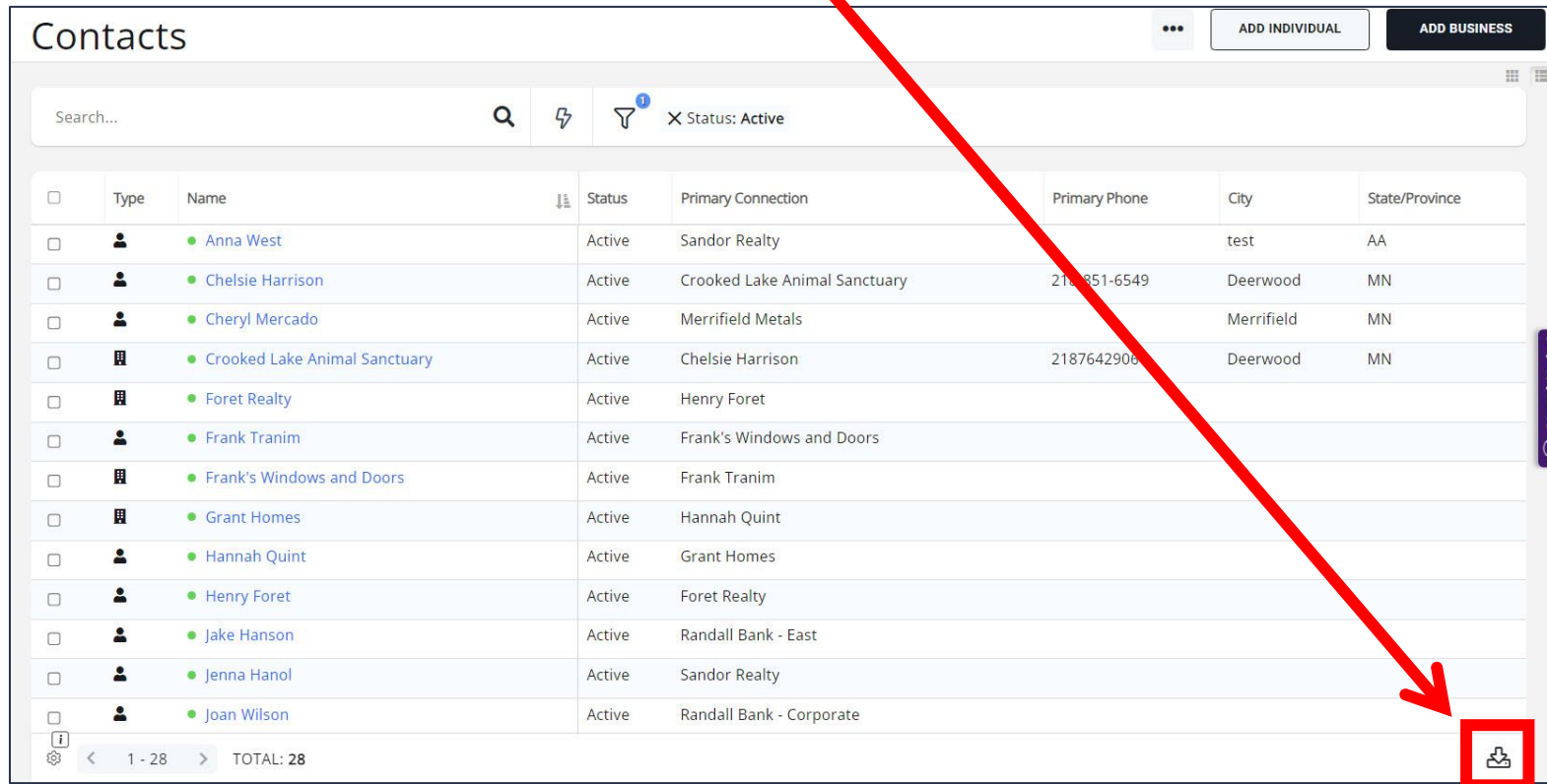Changing displays from Cards to List and vice versa

Common Module Functions

Downloading workspace display

Other Common Functions

- ✏ Edit
- ⊕ Add
- ↗ Log in to Info Hub (as user)
- ⤓ Download
- ••• More Actions

Other Common Functions

- Clicking the ellipsis icon will display a list of the command tasks performed in the module or page

- Tasks will vary per module or page

Other Common Functions

Help

- *Accessible via the [?] in the header bar- this links directly to the Knowledge Base and can search for answers, submit a ticket, etc.*

- *Click the "Need Help?" button on the far right to expand the Resource Center flyout with additional documentation!*
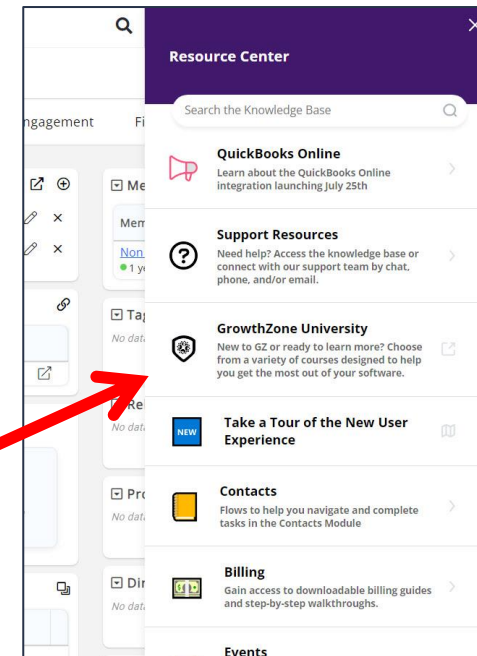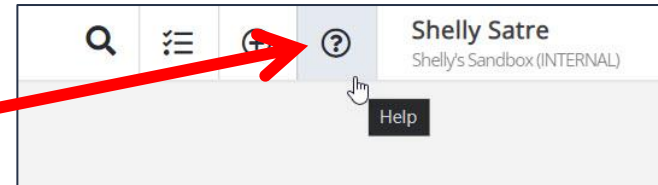
GrowthZone: Modules

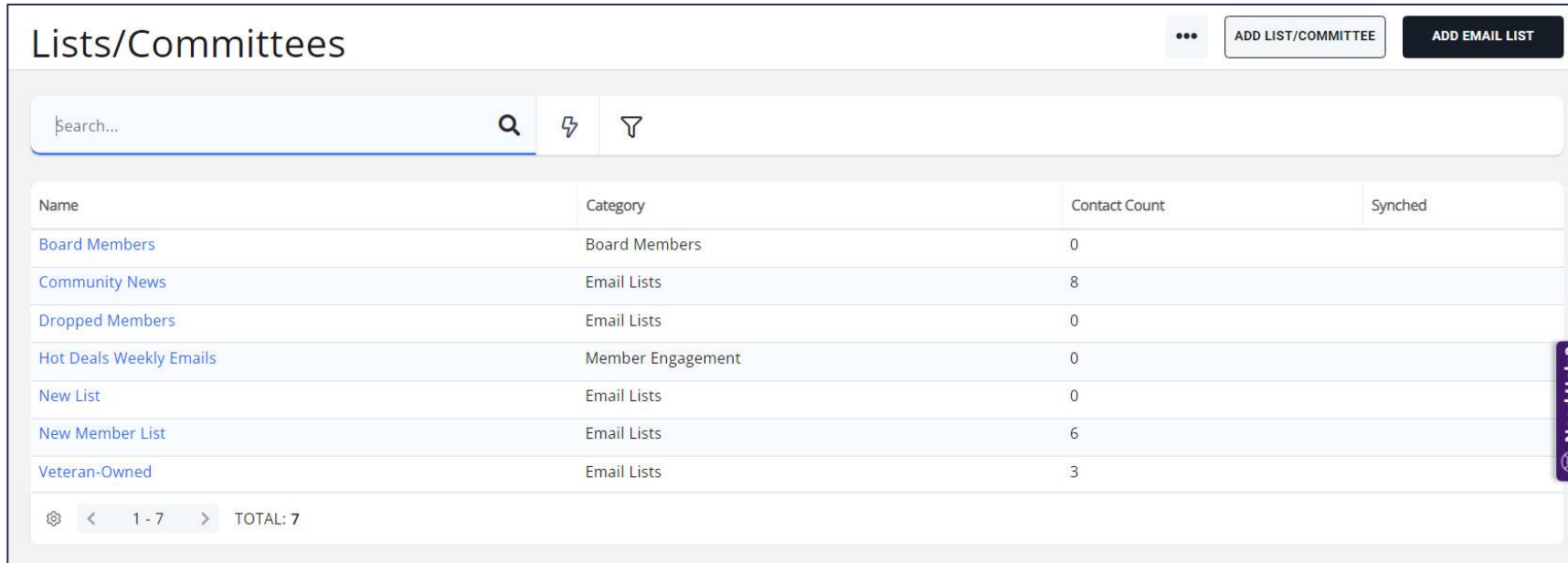# Grow Faster – Acquire New Members

- Lists/Committees
- Communications
- Contact Management
- Membership Management
- Chapters*
- Sales Funnel*

* Requires additional module subscription

GrowthZone
smarter association software

Lists/Committees

The Lists/Committees module makes it easy to connect with and organize your members and individuals into groups for different types of communication

Communications

Templates

Categorization

Automated Messaging/Notifications

Individual/Group Emails

E-mail Receipt Tracking

Contact Management

Contact Management allows you to easily track all important information about your contacts in one central location

Easily manage members activity, billing, and contact info in one central record

Membership Management

Membership Application Form

- *Integrated to your web-site*
- *If configured automatic notification to staff when an application is received*

Sales Funnel*

Provides a clear view of the opportunities currently available, showing you the revenue that your organization can make in the months ahead

Sales Funnel*

Allows for tracking:
- *One time revenue*
- *Recurring revenue*
- *Probability of Sale*
- *Timeline*
- *Communications*
- *Tasks*

Chapters*

The Chapters module allows you to tie membership applications, calendars, communications to chapter level

Chapters

Chapter Name
MN Veterinary Association Chapter
ND Vet Association
New Test Chapter
New Testing Chapter
SD Veterinary Association
Southwest Chapter
Texas Chapter
Wisconsin Veterinary Association

GrowthZone
smarter association software

Retain & Engage Your Members

Events Management

Info Hub

Events Expo*

Sponsors/Ads*

Web Content*

Fundraising*

On-line Store*

Continuing Education*

* Requires additional module subscription

Events Management

The Events module is designed to help you navigate every aspect of the event process - everything from inviting attendees to tracking registrations to creating invoices.
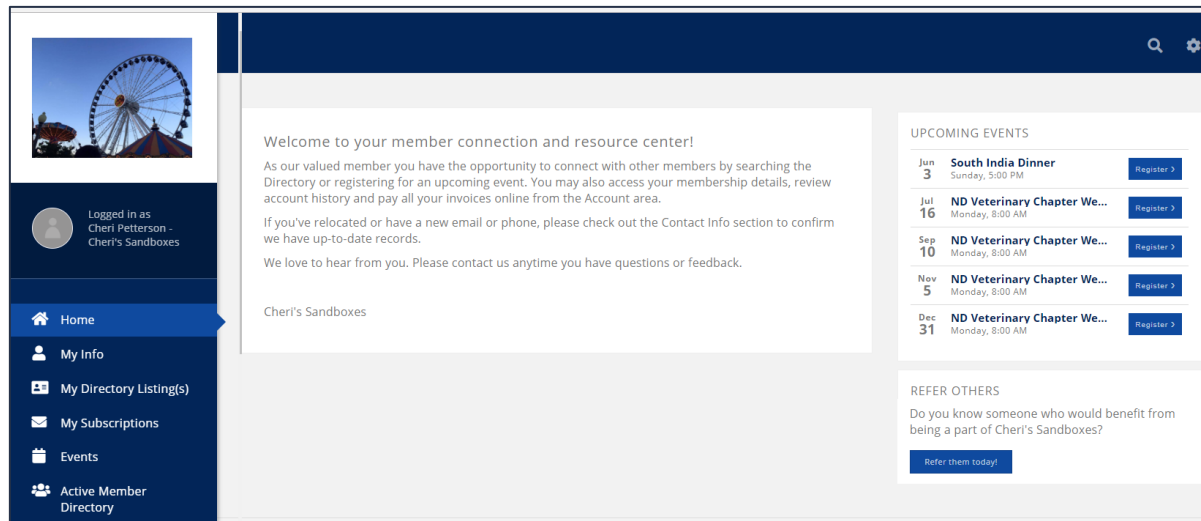
Info Hub

- *Members can update your own information (photos, directory listing, website, etc.)*
- *Manage their account and pay their bills*
- *Register for Events, enter New Events*
- *Enter Hot Deals, Member to Member Deals, & Job Postings...*

Web Content*

- Provide additional benefits to members using hot deals, job postings and member to member hot deals

Events Expo Module*

With the Expo module, you can add sessions to your events, as well as manage event exhibitors

Sponsors/Ads*

The Sponsors/Ads module provides options for offering advertising opportunities to your members

This will give them additional exposure, as well as bring in additional revenue to your association

Fundraising*

Help the community with fundraising campaigns and track donations

Store*

The Store Module is a module that allows the association to sell additional resources/products to members

The integrated into your GrowthZone Software, makes selling and processing orders as simple as possible

CHERI'S SANDBOX STORE
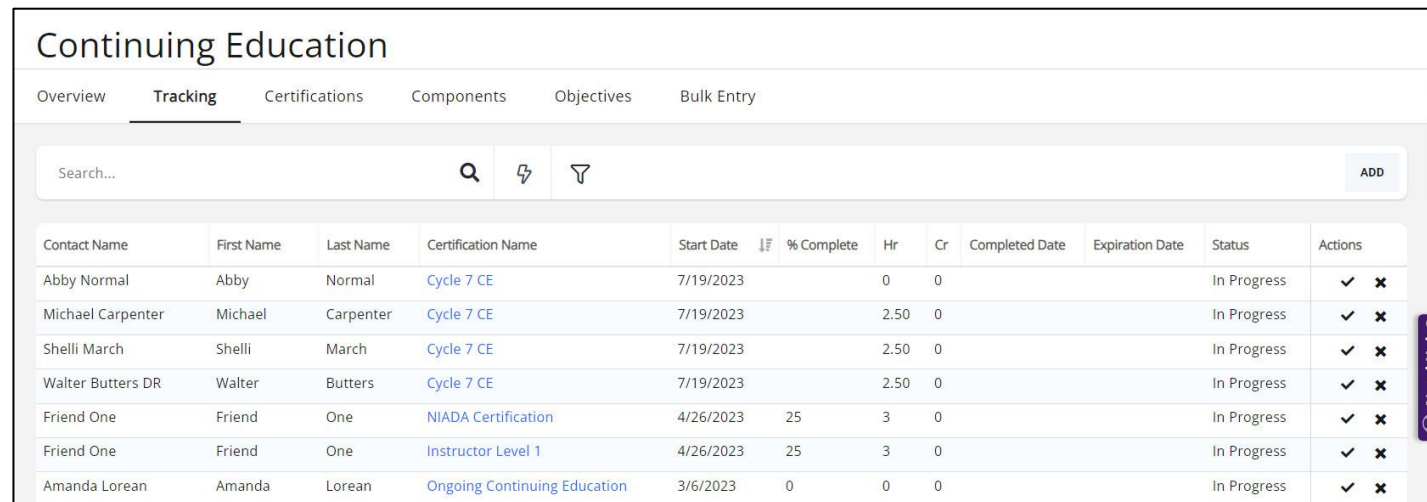
Welcome to our Store.... find all of your lakes logo gear at the tip of your fingers

LOGO T-SHIRT

$ 40.00
Details
Add To Cart

LOGO BACKPACK

$ 50.00
Details
Add To Cart

LOGO BASEBALL CAPS

$ 25.00
Details
Add To Cart

Continuing Education*

The Continuing Education module allows you to track certifications/continuing education events for your members

- *Track hours*
- *Track Requirements*
- *Provide Certificates*

Do More with Less Time

Billing
Reporting
Forms/Surveys*
Project Management*
Marketing Automation*

* Requires additional module subscription

Billing

- *Easy creating of invoices*
- *Accepting Payments*
- *GrowthZone Pay*

Reporting

Wide variety of reports for you to analyze all aspects of your organization

Customizable to meet your needs

Reports

Search... 🔍 ⚡ ▽

Name	Description	Date Added	Is Favorite	Only Visible to Me	Actions
(Beta)Membership Engagement Report		12/8/2020	No	No	
Contacts List/Committee Report		9/8/2016	No	No	
Contacts Report		3/25/2016	No	No	
Event Sponsorships Report		5/26/2016	No	No	
Event Voucher Use Report		2/6/2020	No	No	
Event Activity Report		8/18/2016	No	No	
Event Attendees Report		5/26/2016	No	No	
Event Discount Use Report		12/1/2016	No	No	
Event Sessions Report		10/27/2016	No	No	
Events Sponsorships By Contact Report		6/1/2016	No	No	
Events Overview Report		7/16/2019	No	No	
Membership Change Report		3/23/2016	No	No	
Membership Invoices (Beta)	Lists membership invoices by activation date and...	9/22/2020	No	No	
Membership Invoices by Month (Beta)	A monthly look at paid and unpaid memberships...	9/22/2020	No	No	

⚙ ‹ 1 - 81 › TOTAL: **81**

Forms/Surveys*

Use Forms/Surveys to create online forms or insert links into emails to encourage and track responses

Project Management*

Streamline processes for membership acquisition, membership on-boarding, event planning...
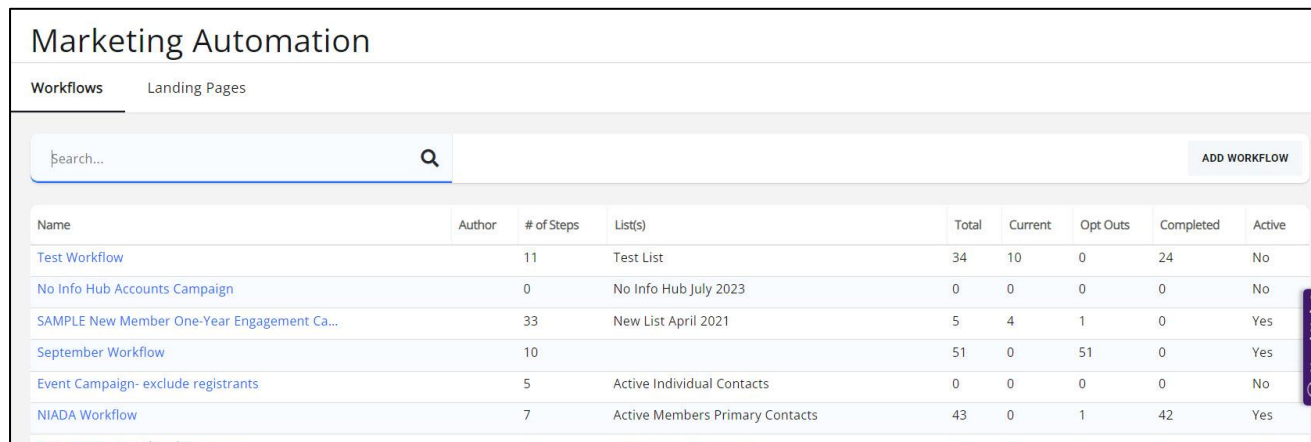
Marketing Automation*

- The GrowthZone Marketing Automation module provides the functionality to set up automated workflows designed specifically around varying communication goals.
- For example, you may want to have a workflow for new prospects, or perhaps a drip campaign for new members. Workflows are tied to lists, which allows you to automatically send targeted information to key individuals and groups.

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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 »

Training Calendar: View Training Event Calendar »

Live Chat: GrowthZone Support Portal (chat on far right) »