



GrowthZone Online Training

Training is essential to your success in implementing the GrowthZone solution. Our goal is to provide you and your staff with the skills needed to maximize the potential of the software to acquire members, retain and engage members and do more with less time.

Customize your Online Training Agenda

You may choose a combination of any of the training sessions below to customize your online training experience. Each session is 2 hour: 1 hour training and 1 hour Q&A.

GrowthZone Solution Overview

The GrowthZone Solution Overview session is an introductory course to help new users (or those requiring a refresher) learn how to navigate in GrowthZone. This session will introduce participants to general navigation of the software and an overview of each module will be shared to provide a basic understanding of what each module will accomplish. Session Length: 2 hours

Agenda:

- Overview
- Software Navigation
- Common Functions
- GrowthZone Modules:
 - Modules to Acquire New Members
 - Modules to Retain & Engage Members
 - Modules to do More with Less Time

Communications - The Basics

The GrowthZone Communications and List/Committee modules make it easy to connect with your board and to organize your contacts into lists for different types of communication. In this session, participants will learn how to setup and manage communications. Session Length: 2 Hours

Agenda:

- Setting up Communications
- Sending/Scheduling Emails
- Logging Calls & Notes
- Reviewing Communications
- Working with Groups





GrowthZone - Managing Contacts - The Basics

Acquiring and managing contacts is made easy with GrowthZone. In this session, participants will learn the basics of setting up and managing their contacts. Session Length: 2 Hours

Agenda:

- Contact management module
- Adding new contacts
- Managing status, account number, tags
- Updating information
- Add/Update/Delete Contact
- Info Hub Access

Membership Management - The Basics

Acquiring and managing members is made easy through your GrowthZone software. In this session participants, will learn the skills to setup and manage their memberships. Session Length: 2 Hours

Agenda:

- Application Form Settings & Options
- Managing Membership Types & Packages
- Managing Memberships - upgrade, downgrade, adjustments, drops
- Membership Reports

Event Setup

The GrowthZone Events module is designed to help you navigate every aspect of the event process - everything from inviting attendees to tracking registrations to creating invoices. In this session, participants will learn the basics of setting up events. 2 hours

Agenda:

- Overview of Event Management
- Initial Setup
- Setting up Calendars
- Default Event Settings
- Add & Edit Event

Event Management

The GrowthZone Events module is designed to help you navigate every aspect of the event process - everything from inviting attendees to tracking registrations to creating invoices. In this session, participants will learn the basics of setting up events. Session Length: 2 Hours

Agenda:

- Overview of Event Management
- Send event invites
- Manage Registrations





- Managing Registrations
- Event Reporting

Working with Event Exhibitors

With the GrowthZone Expo Module, you can manage all aspects of exhibitors for your events. Session Length: 2 hours

Agenda:

- Exhibitors Initial Setup
- Setup Exhibitor Registration Page
- Manage Exhibitor Registrations

Working with the Fundraising Module

Manage fundraising campaigns for both pledge-based and non-pledge donations; provide reporting and financial tracking to your staff and board. Session Length: 2 hours

Agenda:

- Adding Fundraising Campaigns
- Managing Donors/Donations
- Fundraising Reports

Setting Up Billing

GrowthZone allows you to easily generate invoices, send invoices, and manage payments. In this session, participants will learn the basic steps to perform initial setup of billing within the GrowthZone software. 2 hours

Agenda:

- Setting up Chart of Accounts
- Setting up Invoice & Statement Templates
- Setting up Invoice Terms
- Setting up General Finance Settings
- Setting up Taxes
- Setting up Integrated Payment Processing
- Setting Up Goods/Services

Managing Billing - The Basics

GrowthZone allows you to easily generate invoices, send invoices, and manage payments. In this session, participants will learn the basic steps to managing their billing. Session Length: 3 Hours

Agenda

- Review contact transaction history
- Creating Individual Invoices
- Accepting Payments





- Processing Credits & Refunds
- Managing Write-offs
- Managing Deposits
- Billing Reporting

Managing Membership Dues Billing

GrowthZone allows you to easily generate invoices for upcoming membership dues and deliver those invoices. In this session, participants will learn the basics of generating and delivering invoices for their membership billing, as well as reviewing and redelivering past due invoices.

Agenda

- Understanding Recurring Billing
- Best Practices
- Running Upcoming Billing
- Deliver Renewal Invoices

Working with Projects & Tasks

The Project Management module will help you to organize and manage projects from beginning to end. The module can be used to manage your member acquisition, member on-boarding, events, and more. If you have projects that are repeatable (such as member on-boarding) you can create a project template to be re-used, saving you time. In this session, participants will learn the initial setup functions for working with the project/tasks module. Session Length: 2 Hours

Agenda:

- Overview of Projects/Tasks
- Project Templates
- Creating New Projects
- Tracking Project Progress

Working with the Sales Funnel Module

The Sales funnel is a module that allows you to track the progress of various opportunities from Lead to Win. In this session, participants will learn how to setup and manage their sales opportunities. Session Length: 1 ½ hours

Agenda:

- Create Sales Opportunity
- Generate Proposal & Signup Link
- Understand Workflow Processes
- Understanding Timeline Items
- Generate Sales Funnel Reports





Working with Your Web Content

Grow your community and add value with web content that integrates data from your GrowthZone AMS with your website. In this session, participants will learn how to setup and manage web content (including hot deals, job postings, and news releases). Session Length: 2 Hours

Agenda:

- What is the Web Content Module?
- Setting Up Web Content Lists
- Add Web Content from the Back Office
- Add Web Content from Info Hub
- Approving Web Content Submissions
- Public Subscription to Web Content
- Web Content Activity Report

Working with Forms

The GrowthZone Forms/Surveys module enables you to quickly create and publish custom web forms and surveys. In this session, participants will learn how to create, distribute and analyze forms. Course Length: 1 ½ hours.

Agenda:

- Overview
- Creating Forms
- Distributing Forms
- Working with Responses
- Analyzing Responses

Marketing Automation

Do you want to automate a drip campaign for your new members? Or perhaps you would like a nurturing program for existing members. The GrowthZone Marketing Automation module helps make this possible. In this session, participants will learn how to make the most of the Marketing Automation module. Course Length: 1 hour

Agenda:

- Pre-requisites
- Add a Marketing Workflow
- Monitor & Manage Workflow
- Workflow Metrics

Working with the Store Module

Using the GrowthZone you can sell merchandise (including downloadable files) on your website and manage the process with your GrowthZone AMS. Course Length: 1 hour





Agenda

- Setting up Your Store
- Adding Products to the Store
- Managing Store Orders
- Store Reports

Continuing Education

The Continuing Education module is a way by which you will be able to create certification programs and manage certifications through your events. In this session you will learn the processes for setting up your certification programs.

Agenda:

- Initial Continuing Education Setup
- Continuing Education Enrollment
- Associate Continuing Education Program to Events
- Track Certification

Continuing Education for Realtors

The Continuing Education module is a way by which you will be able to create certification programs and manage certifications through your events. In this session you will learn the processes for setting up your certification programs. Realtor Associations can track completion of Code of Ethics.

Agenda:

- Initial Continuing Education Setup
- Continuing Education Enrollment
- Associate Continuing Education Program to Events
- Track Certification
- Code of Ethics and Continuing Education Setup

<https://www.screencast.com/t/SEUFTUqvB1uut>





Realtor Training Modules

NRDS Integration

The GrowthZone integration with the National Association of REALTORS' NRDS database provides association staff an easy way to manage their contacts' NRDS data. Course Length: 2 hours

Agenda

- Review of Initial NRDS Setup
- Managing NRDS Offices
- Managing NRDS Agents
- Managing NRDS Education Record
- NRDS Financial Record
- Understanding the 2 Way sync Process
- Review Event Log for Errors

NAR Ecommerce

GrowthZone provides integration with NAR ECommerce. Through this integration you can easily handle splits of membership dues, accept credit card payment, store credit cards for future use and more.

Course Length: 2 hours

Agenda

- Review of Initial Setup & Splits
- Membership Billing
- Payment Processing

MLS Integration

GrowthZone provides integration to many MLS systems. Through integration you will be able to update information withing GrowthZone, and sync that information to your MLS. Couse Length: 1 hour.

- Initial Setup
- Working with Offices
- Working with Agents





LockBox Integration

GrowthZone provides integration to many MLS systems. Through integration you will be able to update information withing GrowthZone and sync that information to your MLS. Couse Length: 1 hour.

Agenda

- Initial Setup
- Working with Offices
- Working with Agents

Training Pricing

Cost: \$1100 for a block of five hours or \$2200 for a block of 10 hours.

To schedule custom training for your team, please [contact your Account Manager](#). Our schedule is generally booked 3 – 4 weeks out.

