GrowthZone Classroom Training: Working with Sponsors

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SETTING UP SPONSORSHIPS

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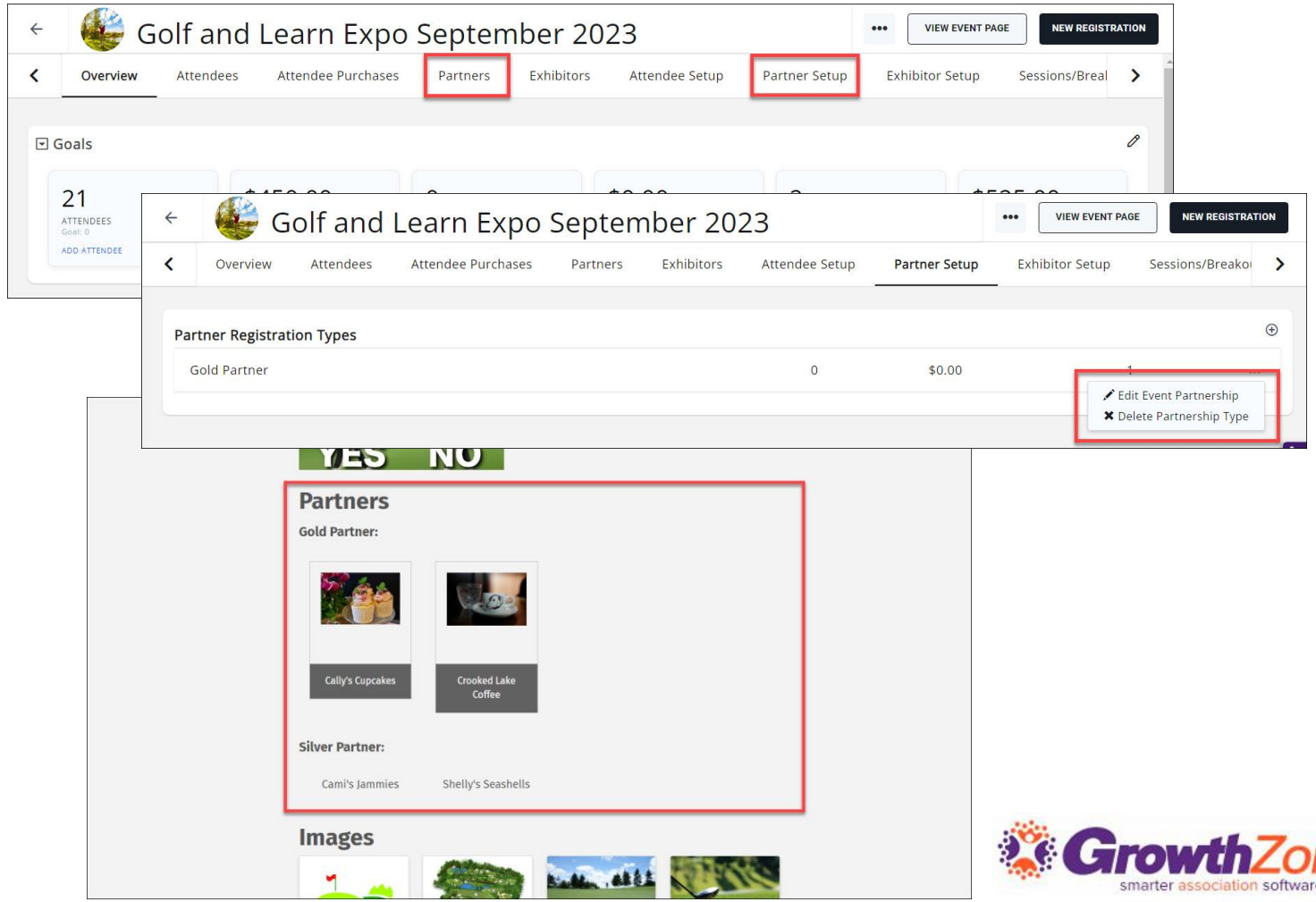
Default Settings

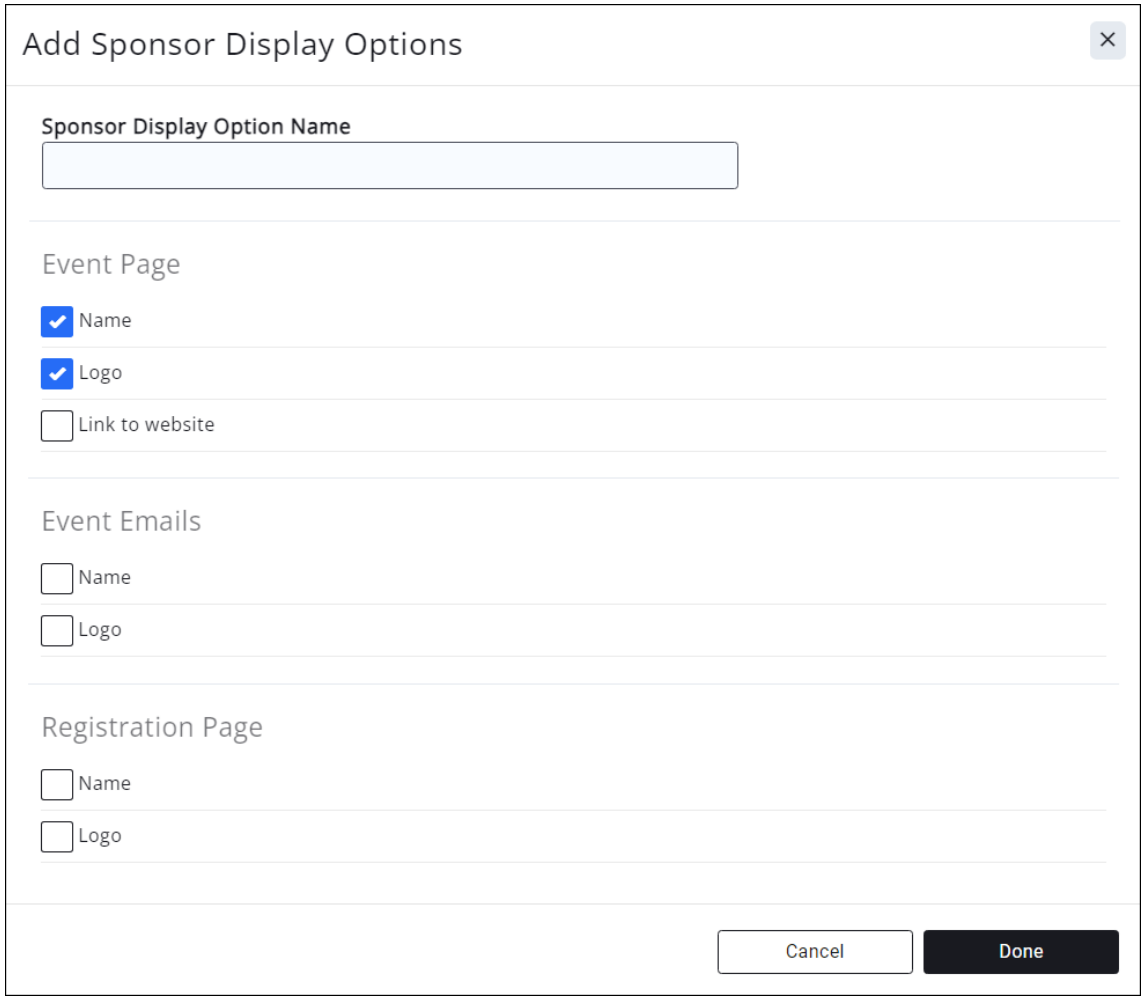
Terminology:

Change the system terminology of “Sponsors” if needed/preferred.



Article: [Changing Sponsor Terminology]

Default Settings



Sponsor Display Options

Sponsor Display Options consist of any combination of the Sponsor Name, Logo, and/or URL appearing on the Event Page, Emails, and/or Registration page.

Article: Sponsor Display Options

Sponsor/Exhibitor Only Registration Type

Before you go to the Sponsor Setup tab:

- Are you including attendees with the purchase of a sponsorship?
- Do you want or need a sponsor-specific registration type?
- Do you need to know who will be attending at the time of registration, or do you want Sponsors to have the option of adding included attendee names later?

Article: Set Up Your Event Registration Types

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Sponsor/Exhibitor Only Registration Type

These questions will help you determine:

- If you need to set up an attendee registration type to include with sponsor registrations
- If that attendee registration type needs to be separate than the other standard attendee registration type(s)
  - Use the “Only with Sponsor / Exhibitor” availability
- If that attendee registration type needs to be:
  - Free or Simple Paid type (must know all names during registration)
  - Or Table/Team type (only one name is required)

Article: Set Up Sponsor Registration Type

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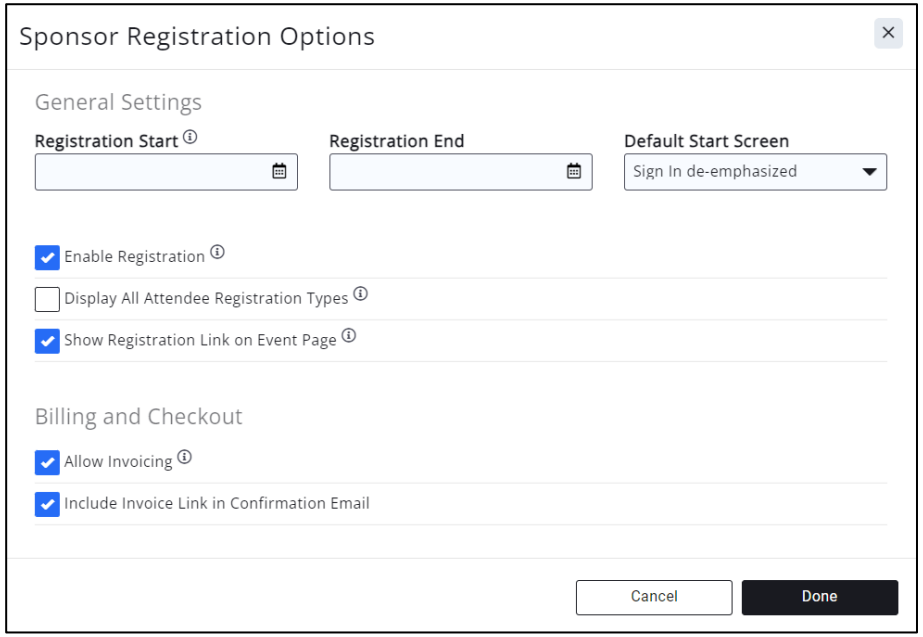
Sponsor Registration Options



Article: Set Up Sponsor Registration Options

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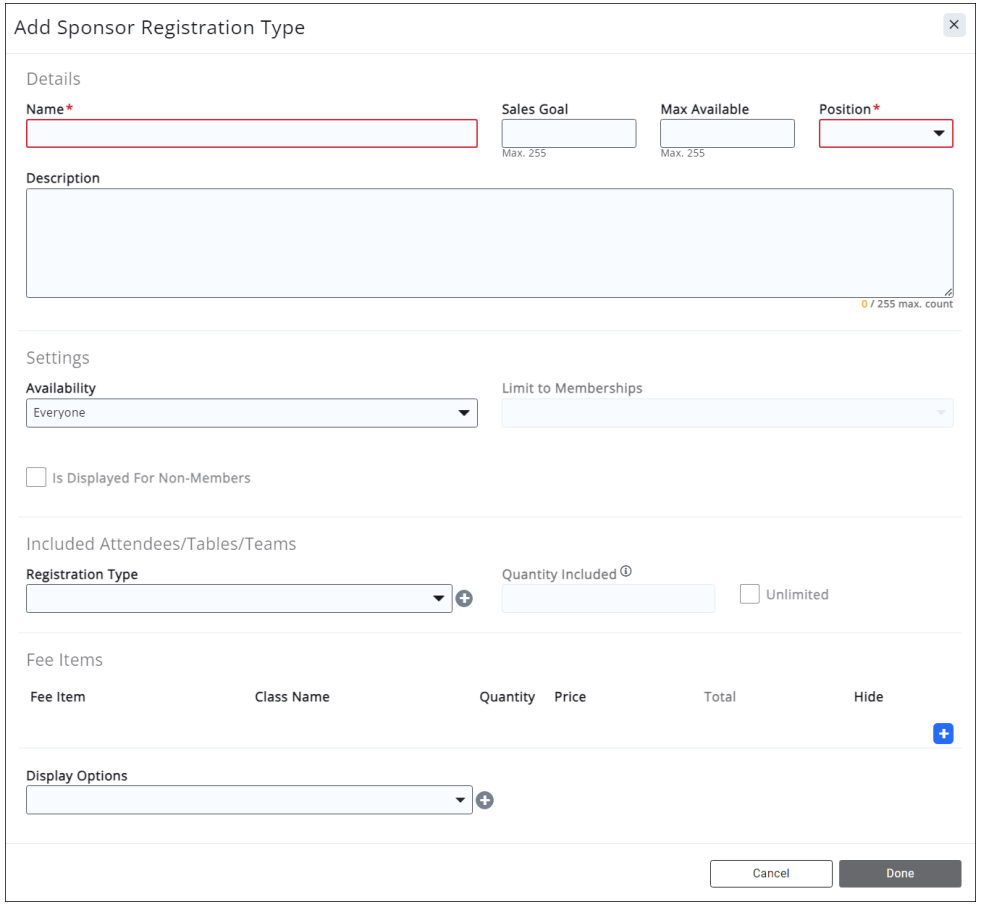
Setting Up Sponsor Registrations



Correlate your Sponsor Display Benefits with a Sponsor Registration Type, set the availability, and include any number of attendees you wish.

Article: Set Up a Sponsor Registration Type

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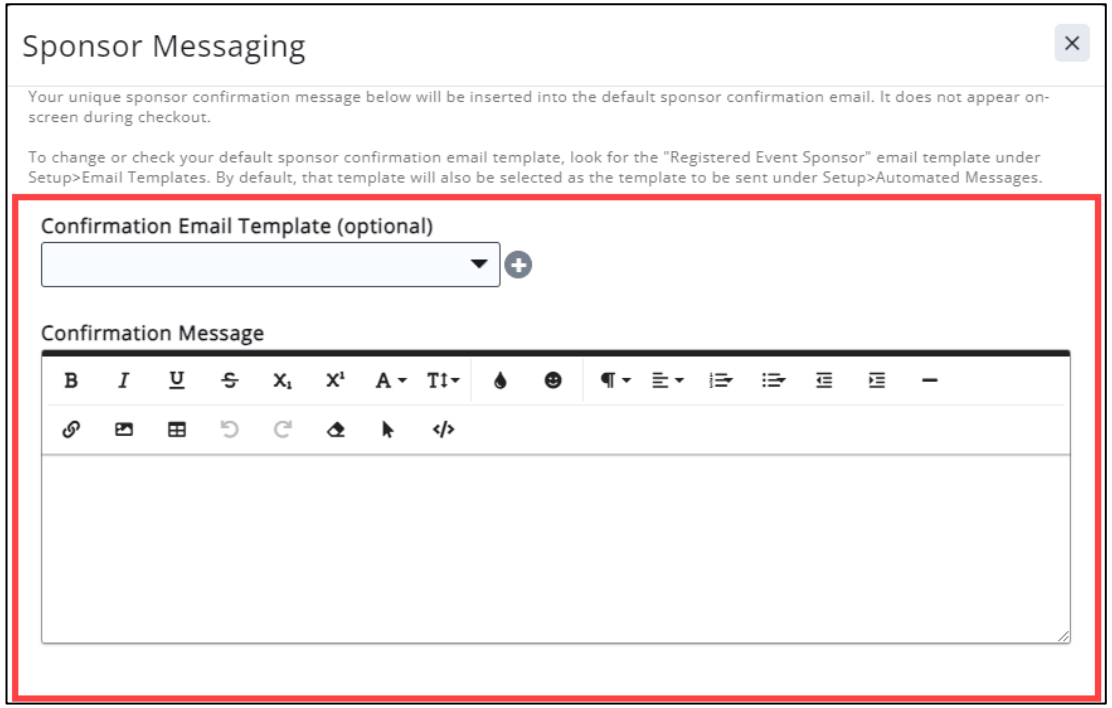
Set Up Sponsor Messaging

You can customize the message a Sponsor sees after submitting their Sponsor registration AND the confirmation email they receive in the Sponsor Messaging options.



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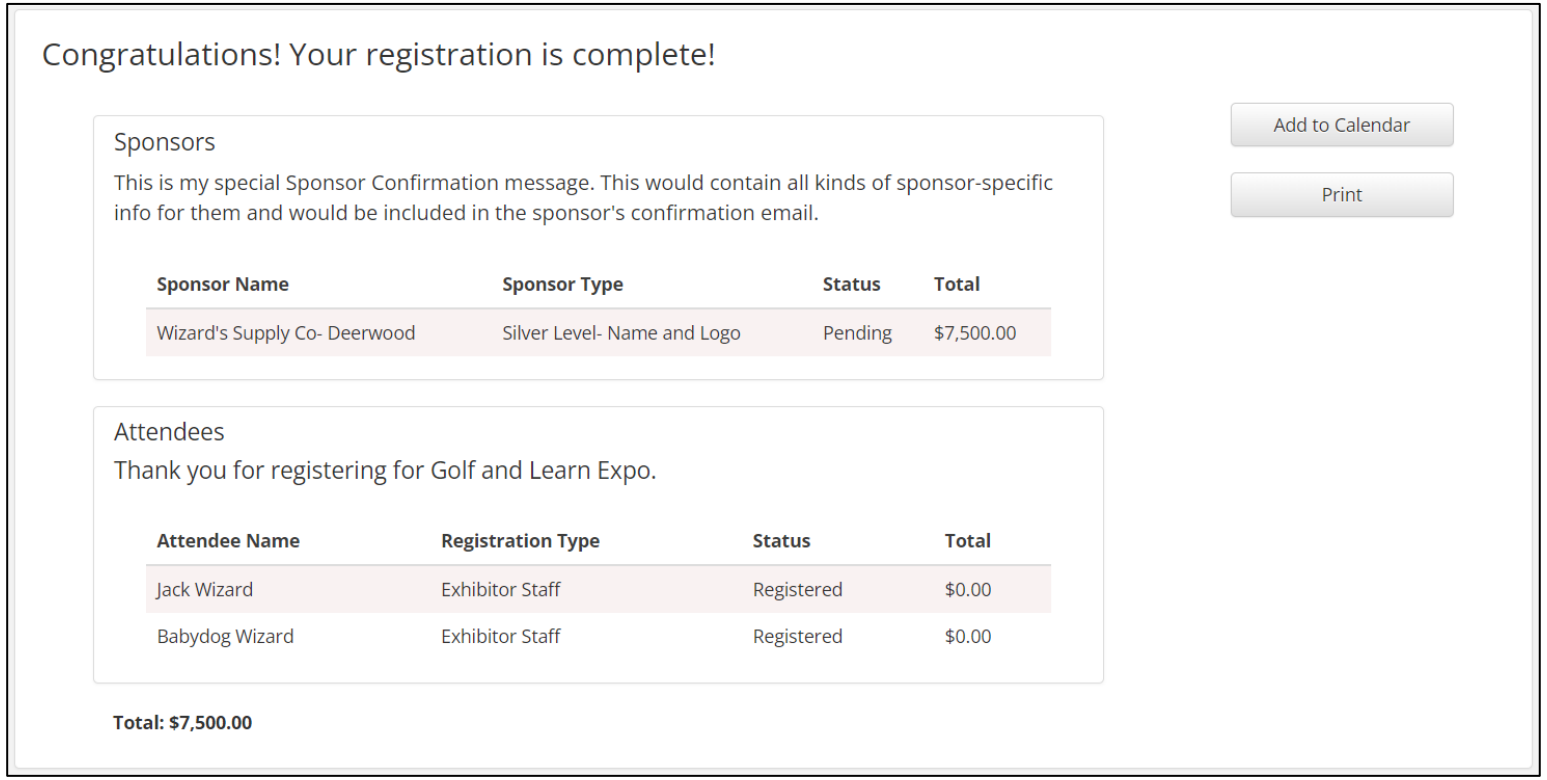
Set Up Sponsor Messaging



If nothing is entered for the Confirmation Message, the system will use the default page.

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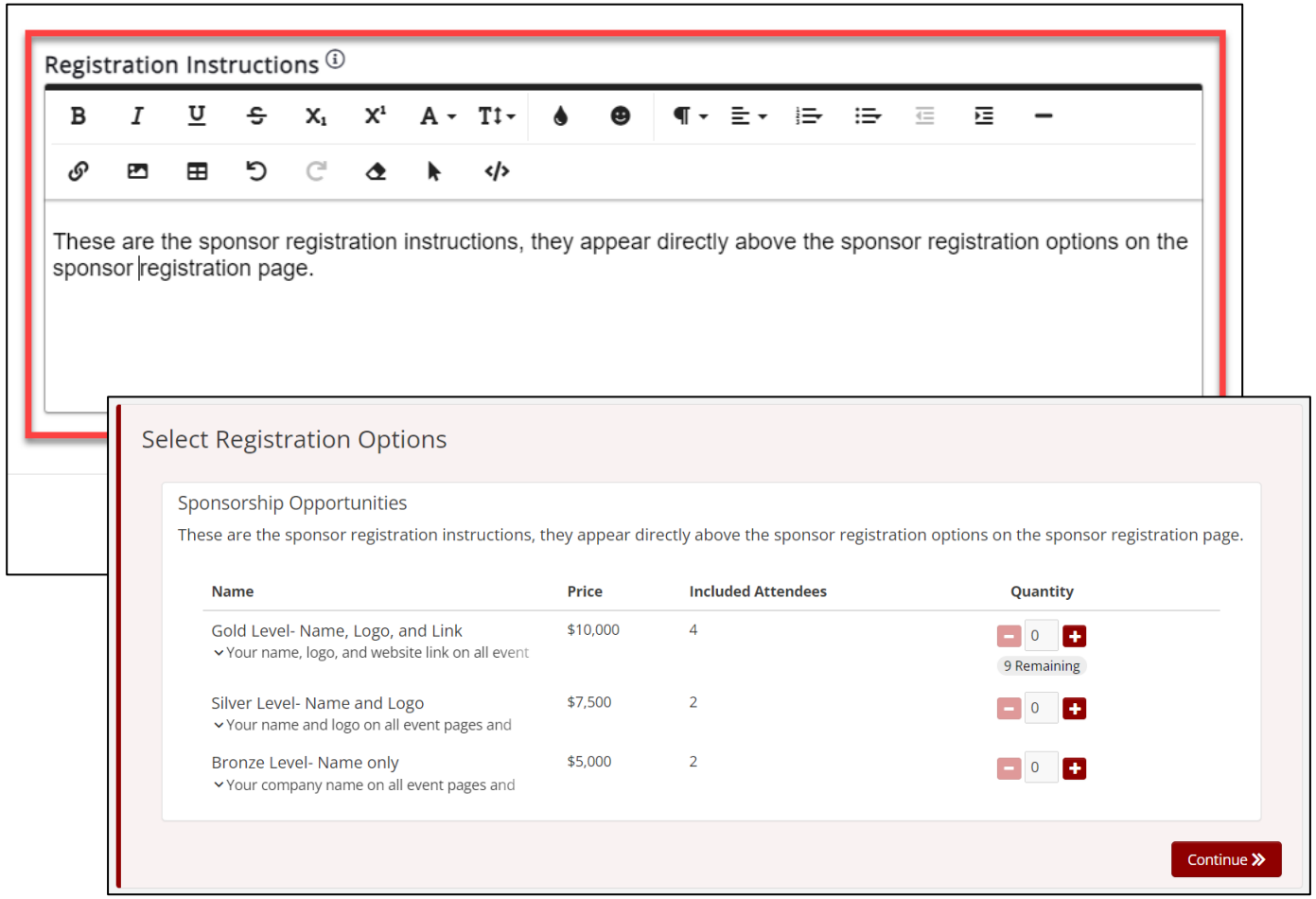
Set Up Sponsor Messaging



If you need or want to include specific instructions on the process for your sponsor registrations, you can use the Registration Options in the Sponsor Messaging window.

Article: Sponsor Messaging

MANAGING SPONSORSHIPS

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Registering Sponsors

Register Sponsors- Back Office

aka “Register Sponsor (as Staff)”

Register Sponsors- Online

aka “Register Sponsor (as Non-staff)”

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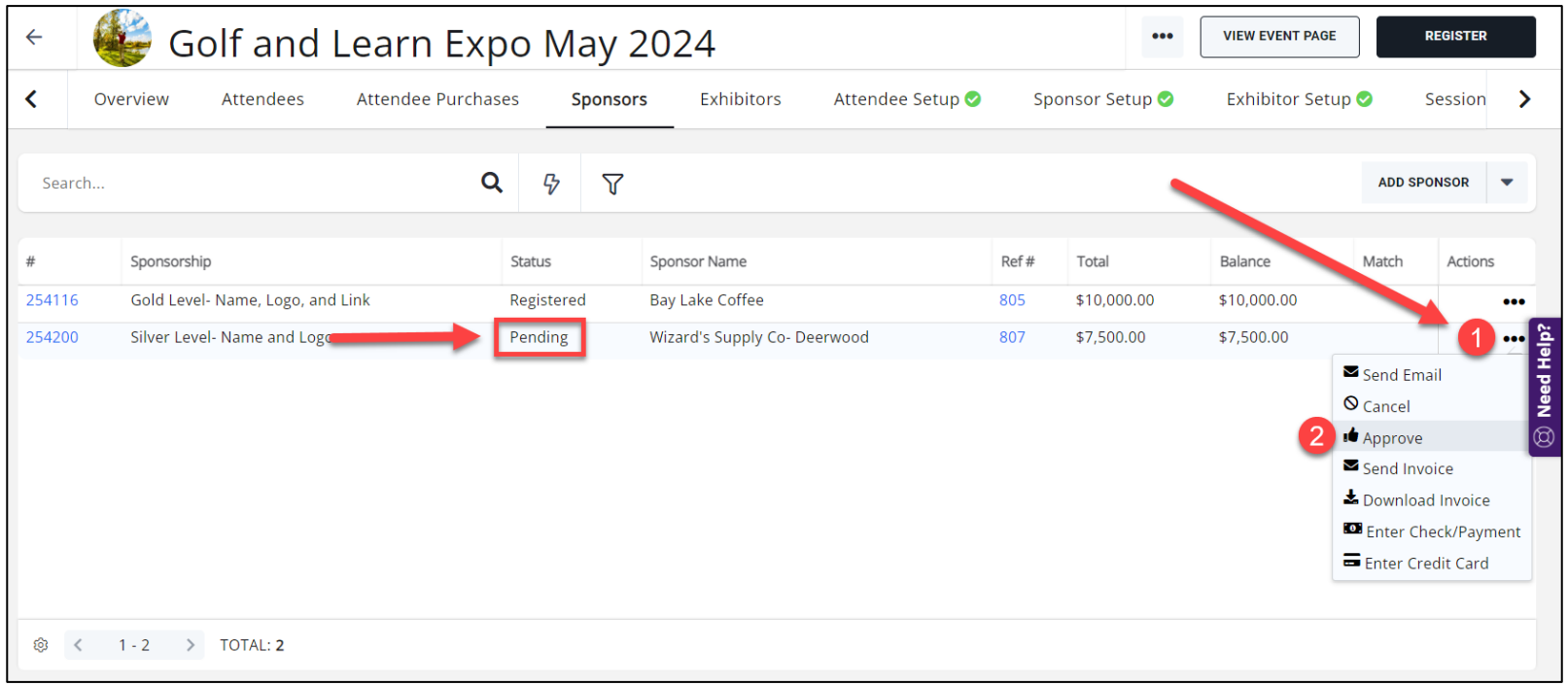
Approving Sponsors

Regardless if a Sponsor registers themselves OR if they are registered by staff, Sponsors MUST BE APPROVED before they will receive their Sponsor Display benefits.



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WORKING WITH REGISTRATIONS (ATTENDEE AND SPONSOR)

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Working with Registrations

**We pre-sell our sponsorships at the beginning of the year, before our events are set up.
How do I get that revenue into the event?**

Credit memos will allow you to track the revenue from the initial invoice and payment and transfer it to the event. This process works for sponsorships, exhibitors, or any presold event-related option.

Article: Pre-Sold Sponsorships: Best Accounting Practices

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Working with Registrations

“Someone registered for the wrong registration type. How do I fix it?”

Steps:

- Cancel the existing registration; for sponsorships, be sure to cancel the related attendee registrations as well!
- Create a credit memo for the amount paid
- Use the Register- As Staff option to create a new registration for the correct type; select the “Pay By Invoice” option
- Apply credit memo to the new invoice
- Deliver invoice and collect remaining balance

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Working with Registrations

"Can someone add items to their registration if they forgot or changed their mind?"

Attendees:
Yes, by using the "Update Registration Information" link in the confirmation email. If the invoice is paid, the invoice will be re-opened and modified to include the additional unpaid items.

Sponsors:

No. Follow the same steps as if they registered for the incorrect registration type.

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Working with Registrations

"Can someone remove items from their registration if they changed their mind?"

Attendees:
No. Follow the same steps as if they registered for the incorrect registration type.

Sponsors:

No. Follow the same steps as if they registered for the incorrect registration type.

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THANK YOU!!!

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