GrowthZone – Info Hub Pt. 3: Launch and User Management

GrowthZone
smarter association software

Info Hub: Launch and User Management

Now that we've set up, customized, and can manage submissions and content in the Info Hub, it's time to launch it to our members. Today we'll go over some best practices prior to launch; how to invite your members both in bulk and individually; how to manage usernames and passwords and account access; and finally, we'll look at the User Account Report.

Info Hub Launch/User Management Agenda

Pre-Launch Best Practices

- Review User access levels/settings
- Review Available/Implemented Info Hub Components
- Review/Customize Messaging
  - Initial Messaging
  - Follow up Messaging
- Integrate Info Hub Training for all new members

Launch the Info Hub

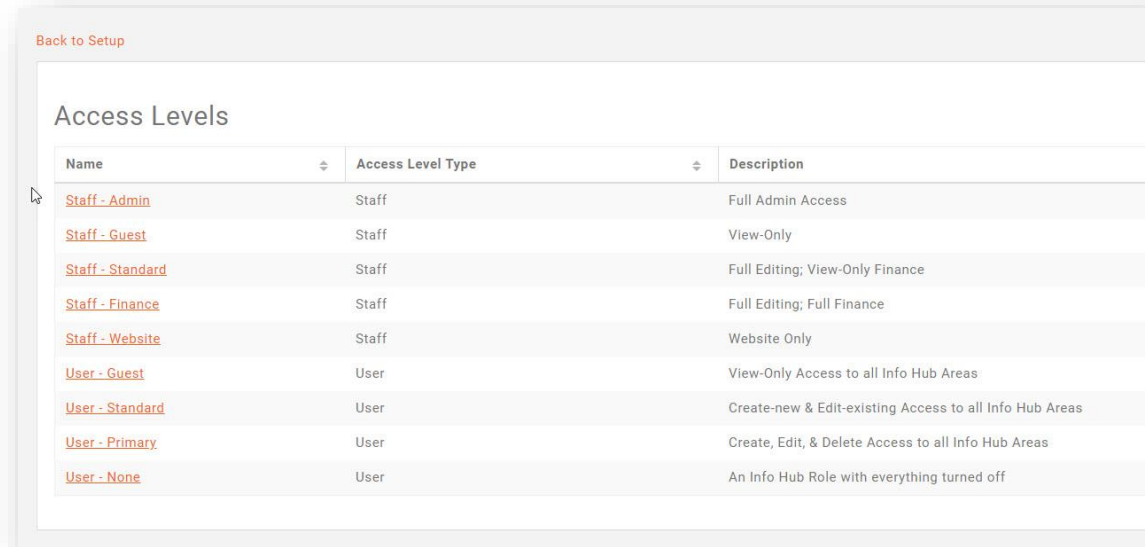- Mass Email Invitation
- Individually

User Management

- Change Username/Password
  - Info Hub (member)
  - Back Office (Staff)
  - Impersonate (Staff)
- Disable User
- Delete User

User Account Report

- New Users
- Users without Logins

Pre-Launch Best Practices

Review User Account Levels/Settings

Go through each of your user account levels and make sure each area in the Info Hub has the correct level assigned. It can be helpful to have a test contact in your database that you can use to test each level as needed.

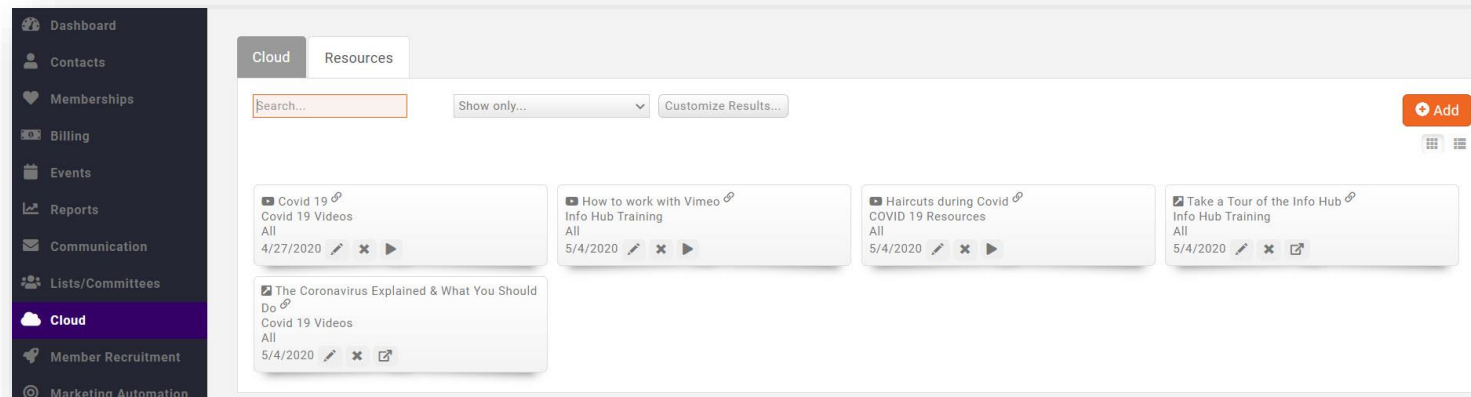WIKI: Create a New User Access Level

Pre-Launch Best Practices

Review Available/Implemented Info Hub Components

Are you using all the components of the Info Hub that are available to you? Be sure your access levels match up with the implemented components (Events, Resources, Web Content, Forum, etc.) and that each component is configured as needed.
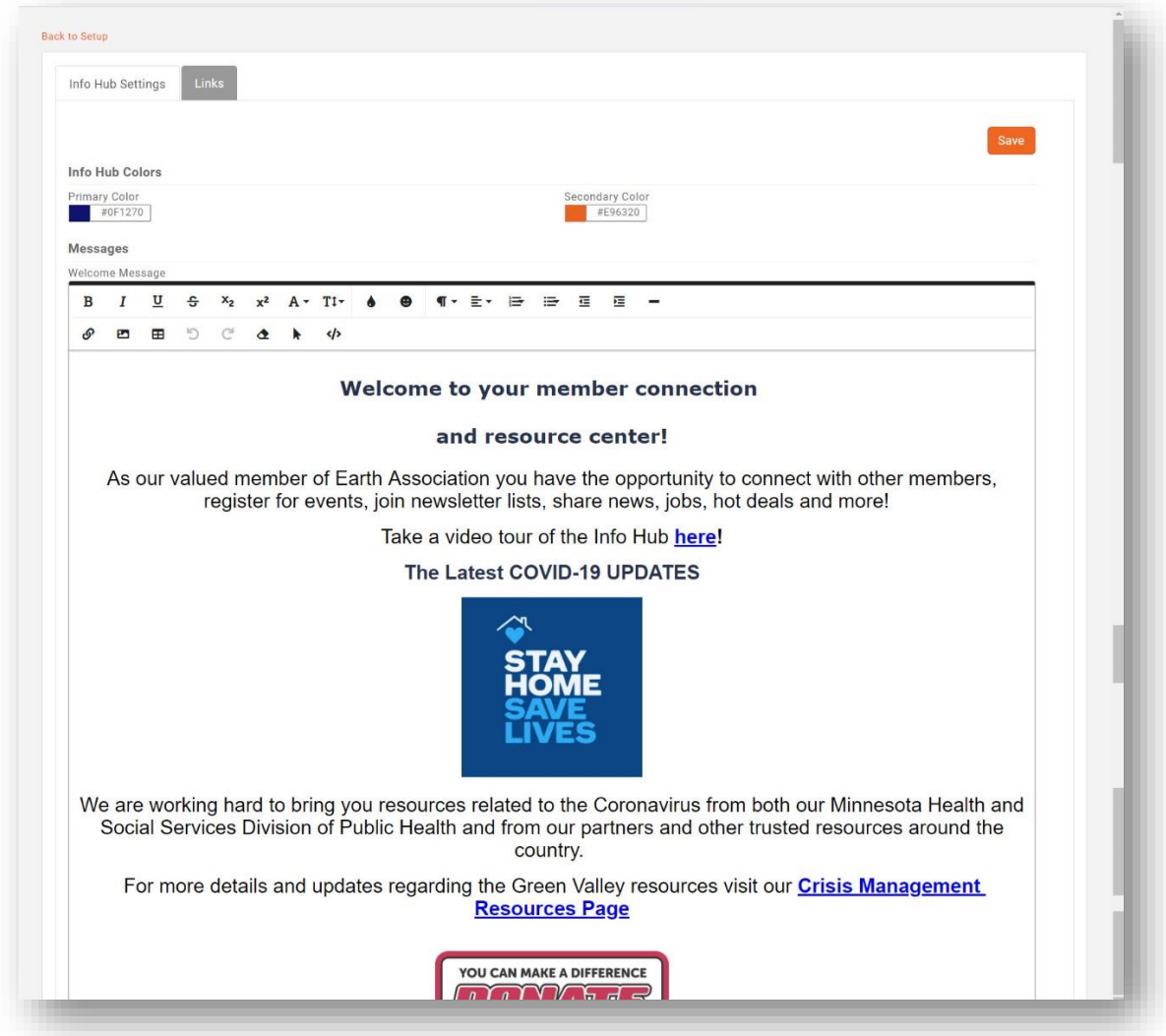

WIKI: Info Hub

Pre-Launch Best Practices

Review and/or Customize Messaging

Don't forget to customize your home page messaging, Info Hub colors, and the email templates you'll be using to communicate with your members.

WIKI: Customize Info Hub Display

WIKI: Create and Manage Email Templates

Pre-Launch Best Practices

Include Info Hub Intro/Tour in New Member Onboarding/Training

As new members come into your organization, it might be helpful to include a tour of the Info Hub in your onboarding process. Consider setting up a series of emails to your new members with links to our "Training for Your Members" series, or make your own.

WIKI: Training for Your Members
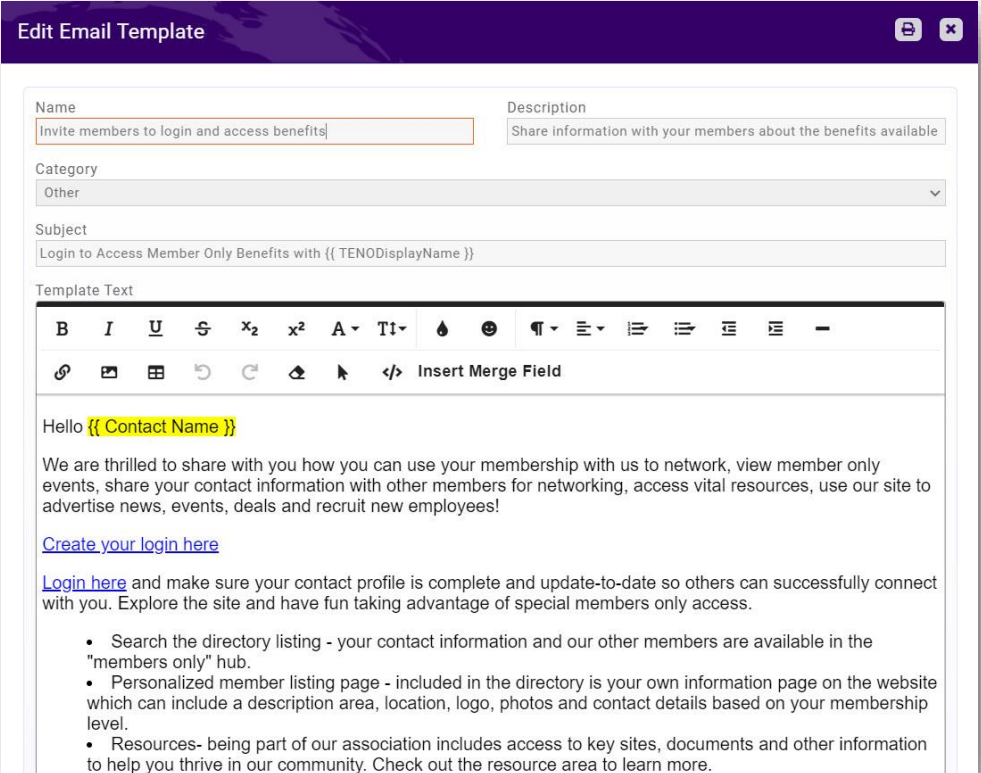
Launch the Info Hub

Mass Email Invitation

Launch your Info Hub by sending a mass/bulk email. You can use the "Invite members to login and access benefits" email template as is, you could customize it, or create your own unique email message inviting your members to create their account and log in.

WIKI: Send a Mass Email

WIKI: Add Report Contacts to a List/Committee

WIKI: Create and Manage Email Templates
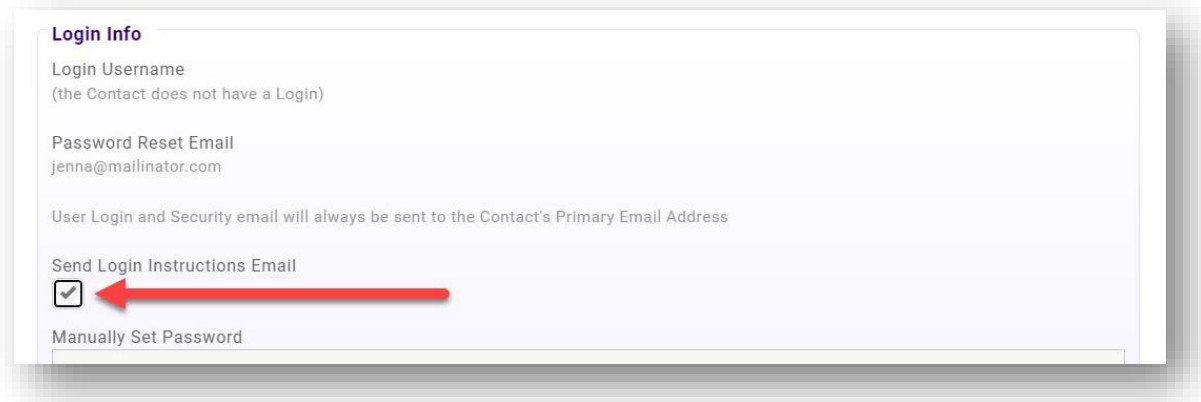
Edit Email Template

Name
Invite members to login and access benefits

Description
Share information with your members about the benefits available

Category
Other

Subject
Login to Access Member Only Benefits with {{ TENODisplayName }}

Template Text

Hello {{ Contact Name }}

We are thrilled to share with you how you can use your membership with us to network, view member only events, share your contact information with other members for networking, access vital resources, use our site to advertise news, events, deals and recruit new employees!

Create your login here

Login here and make sure your contact profile is complete and update-to-date so others can successfully connect with you. Explore the site and have fun taking advantage of special members only access.

- Search the directory listing - your contact information and our other members are available in the "members only" hub.
- Personalized member listing page - included in the directory is your own information page on the website which can include a description area, location, logo, photos and contact details based on your membership level.
- Resources- being part of our association includes access to key sites, documents and other information to help you thrive in our community. Check out the resource area to learn more.

Individual Email

You can also invite members individually from their User Account settings in their contact record. This may be needed if they didn't receive, or missed, the initial invitation email, or you don't include Info Hub information in their initial membership emails.

WIKI: Setting up Individual's Info Hub Access

User Management

Change Username/Password

- If you have given them permission to do so in their access level, members may change their own username and/or password via the Info Hub.

    WIKI: Reset Info Hub Username/Password

- Staff is able to reset passwords in the database.

    WIKI: Set a Temporary Password for an Info Hub User

    WIKI: Send a Reset an Info Hub Password Email to a User

- Staff can also "impersonate" a member in the Info Hub if further troubleshooting is needed.

    WIKI: Impersonate a Member in the Info Hub

User Management

Disable User

You can disable a user in the database; this will save their credentials if they eventually need to log in again (like after a leave of absence).

WIKI: Disable User Info Hub Access

Delete User

You can delete a User Account if it is no longer needed (for example, an employee is no longer associated with their employer).

WIKI: Delete User Info Hub Access

User Account Report

The User Account Report + "smart" email lists can help you track and communicate with the members in your organization that do- and don't- have Info Hub accounts created.

WIKI: User Account Report

User Account Report

Use Case 1: We want to send an introductory email to members who created their accounts within the last week.

- Set up User Account Report to find accounts created within the last week.
  - Adjust fields to display as preferred
  - Save this report
- Create a List/Committee and select your report in the "Synchronize Nightly with Report" option
- Select or create an email template for communication
- Include weekly tasks in your procedures
  - Send "Welcome" messaging to the list
  - Update the report dates

User Account Report

Use Case 2: We want to send a reminder email to members that have not yet created their account, inviting them to log in.

- Set up User Account Report to find members without accounts.
  - Adjust fields to display as preferred
  - Save this report
- Create a List/Committee and select your report in the "Synchronize Nightly with Report" option
- Select or create an email template for communication
- Include a regular tasks in your procedures to send "Reminder" messaging to the list at the interval you decide

Questions?

Training and Support

Customer Service Hours:
Monday-Friday: 8am to 5pm (Central)
GZSupport@growthzone.com
800.825.9171, Option 4, then Option 2

Online Support Wiki:
Access Wiki »

Training Calendar:
View Training Event Calendar »

Integrated Help/Chat:
Chat with Support