Updated Launch Process

Launch Director

1. Launch Director collects 5 approved applicants

2. LD submits the following to regionaloffice.bni.com:
    a. Launch Tracker confirming the 5 applicants
    b. Name of the Launch Director who will be approving online applications in BNI Connect moving forward

3. Once Core Group is in BNI Connect, LD instructs applicants to submit their online application using the “Apply for Membership” function on their Regional website
    a. The Launch Director will find pending apps in BNI Connect under Operations>Chapter>Manage Memberships>View Pending Applications

4. LD reviews all applications and follows typical interview process
    a. If approved, mark as approved in BNI Connect
        i. Access the approval screen in BNI Connect under Operations>Chapter>Manage Memberships>View Pending Applications

5. When the Chapter has hit 17 applicants, please submit a completed tracker to regionaloffice.bni.com
    a. Allow 24 hours for the Ops Coordinator to review the tracker before giving the approval for launch

Operations Coordinator

1. LD submits the tracker with 5 applicants:
    a. Create the core group in BNI Connect
    b. Assign the LD to the AD role in Connect

2. Reconcile payments if they come through Zendesk via Cognito Form for PayPal or Check

3. LD submits the tracker with 17 applicants:
    a. Verify payment and applications for all 17 applicants and give the LD the go for launch!

How to Launch a Chapter

Process to Launching a Chapter

When 5 applicants are committed to joining the forming Chapter, the Launch Director (LD) submits a tracker to regionaloffice.bni.com for the Forming Chapter to be created in BNI Connect

The LD directs all applicants to apply to the Forming Chapter on their Regional Website under the tab “Apply for Membership”

The LD interviews applicants and approves or declines their application on the Chapter Pending Application screen*

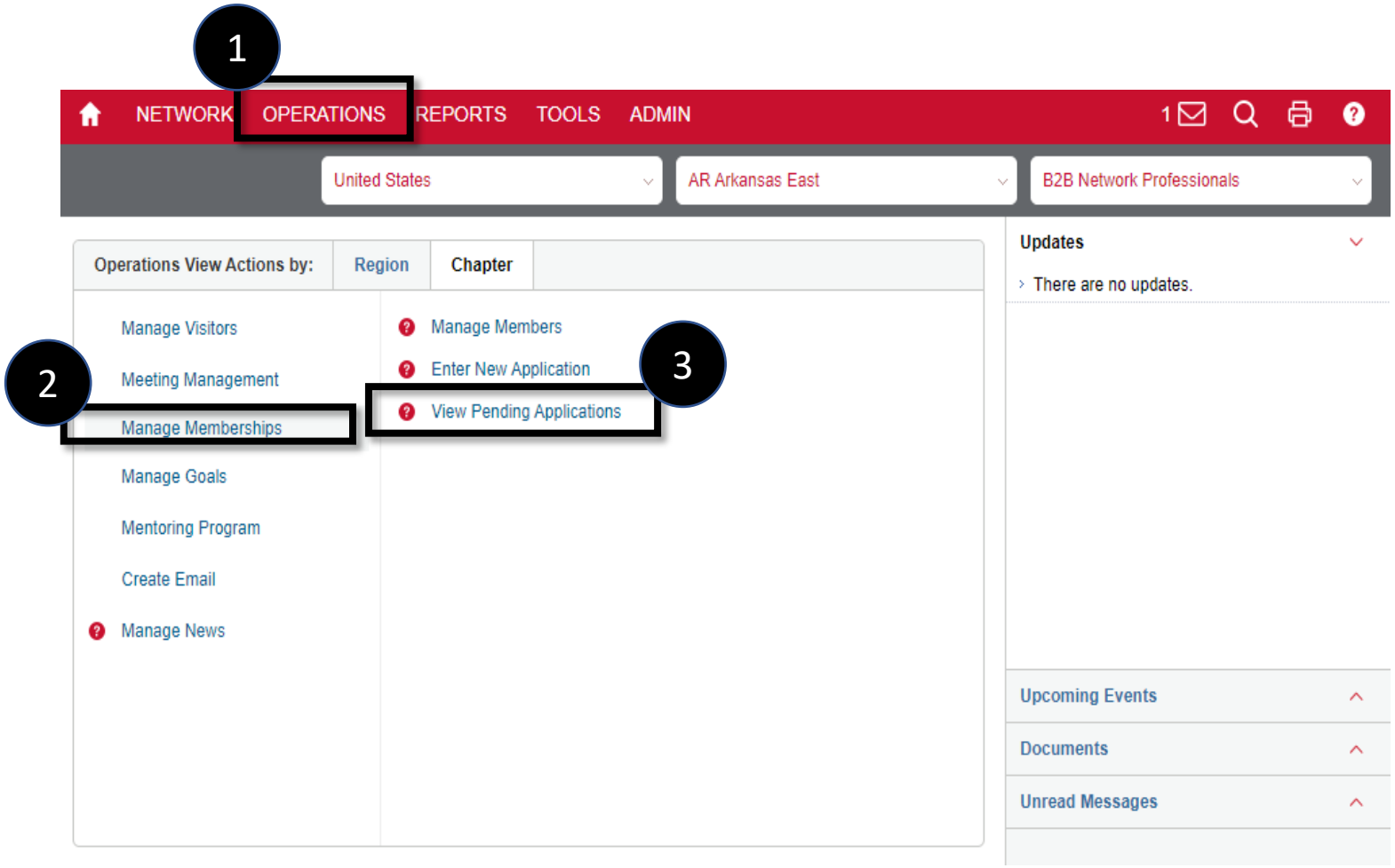
The LD ensures payment is submitted by checking the Chapter Pending Application screen*

**Further details in subsequent slides*

Chapter Pending Application Screen

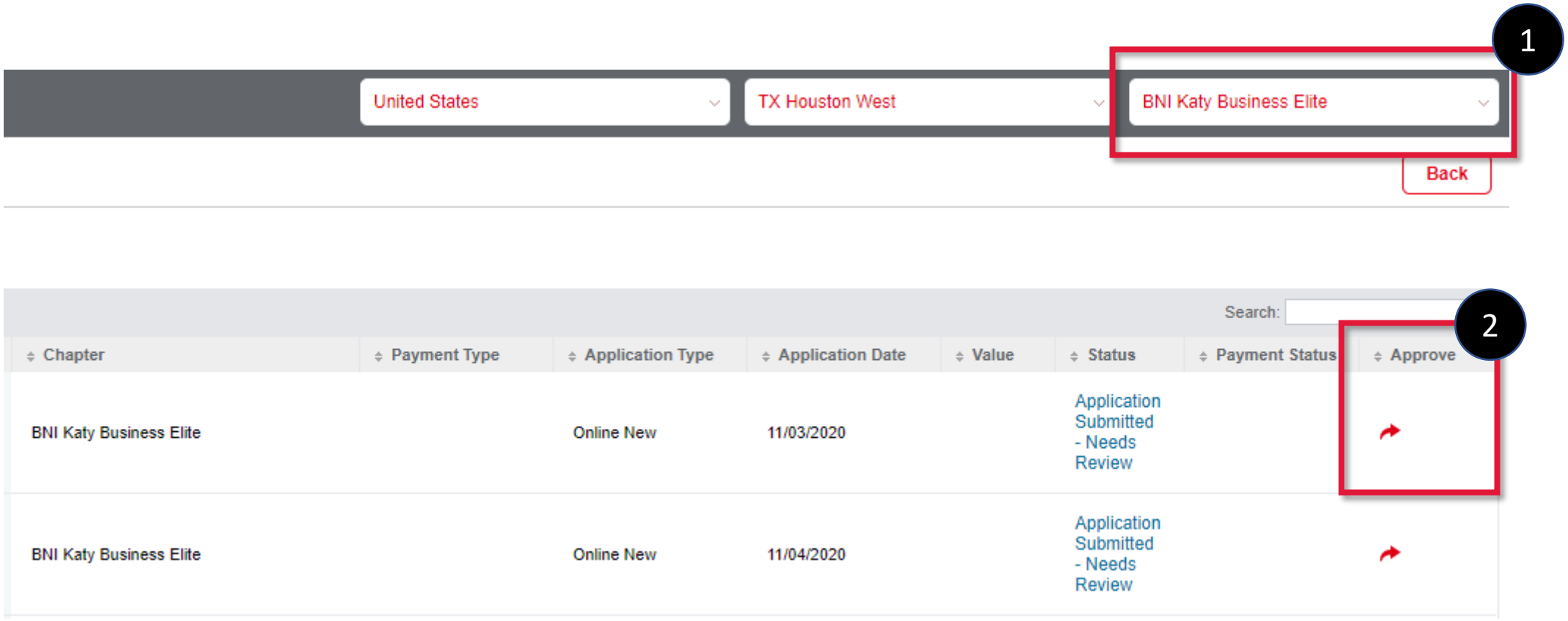
- The Chapter Pending Application screen will allow the LD to see all the applications for their Forming Chapter, approve applications, and see if payment was submitted

- The LD can access the screen on BNI Connect by going to:
  - Operations> Chapter> Manage Members> View Pending Applications



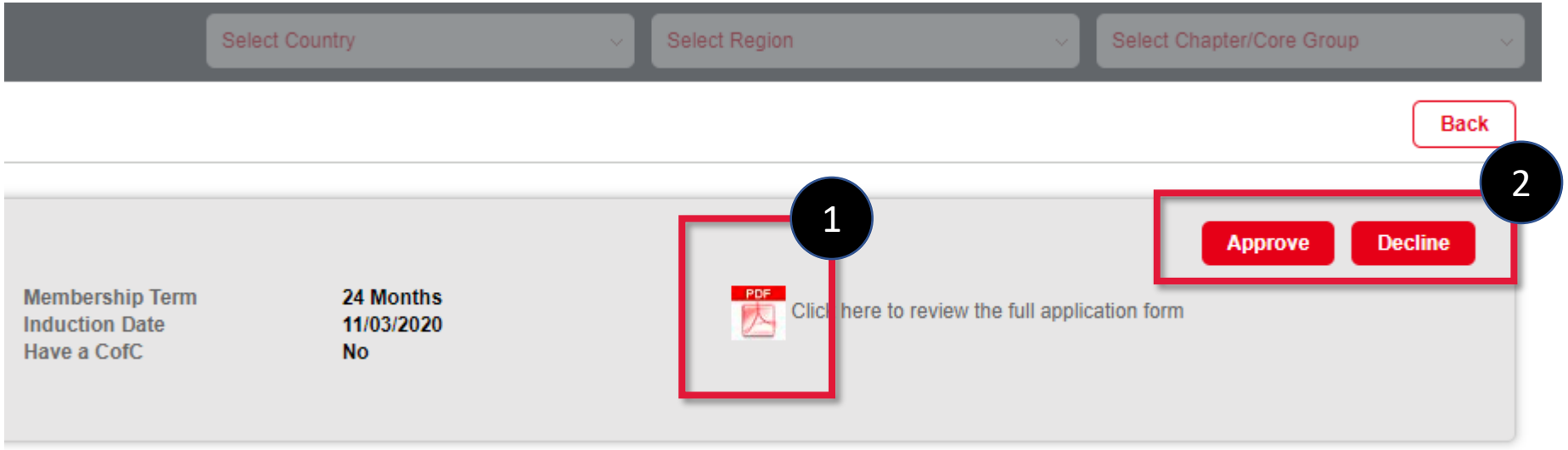
How Do I Access Applications?

- On the Chapter Pending Application screen, the LD first needs to select their Forming Chapter
- When that is selected, they can see all applicants currently pending in their Forming Chapter
- To access the application for an applicant, click on the red arrow



How Do I Approve Applications?

- The application can be accessed by clicking the PDF picture below
- After interviewing and conducting reference checks, the applicant can be approved or declined by pressing either of the red buttons below

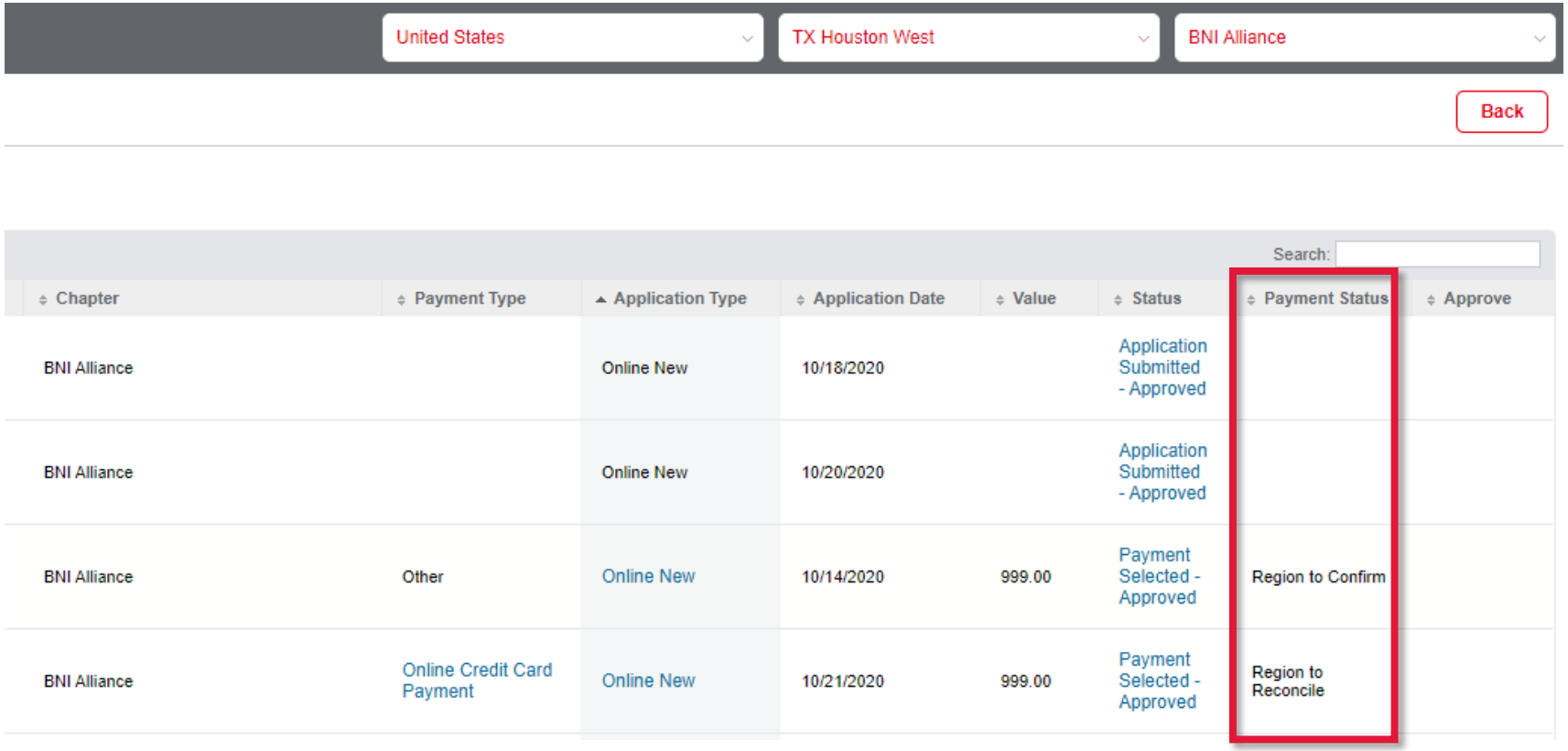


What Happens Next?

- If the applicant is approved, they will receive a congratulations email with a link for payment

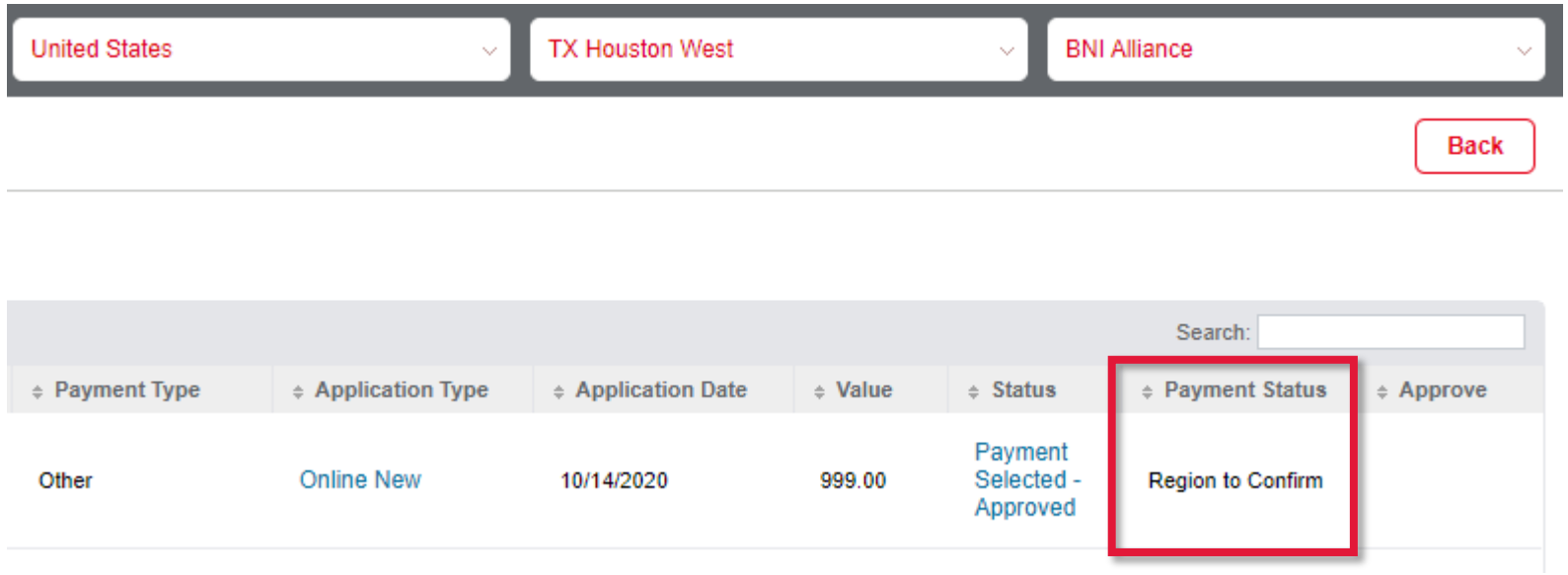
How Do I Know If Payment Was Submitted?

- The following slides will provide explanations for the “Payment Status” column
- Using these slides, the LD will know where each applicant is in the payment process and what steps they need to take to ensure payment is submitted



Chapter	Payment Type	Application Type	Application Date	Value	Status	Payment Status	Approve
BNI Alliance		Online New	10/18/2020		Application Submitted - Approved		
BNI Alliance		Online New	10/20/2020		Application Submitted - Approved		
BNI Alliance	Other	Online New	10/14/2020	999.00	Payment Selected - Approved	Region to Confirm	
BNI Alliance	Online Credit Card Payment	Online New	10/21/2020	999.00	Payment Selected - Approved	Region to Reconcile	

Payment Status: Region to Confirm

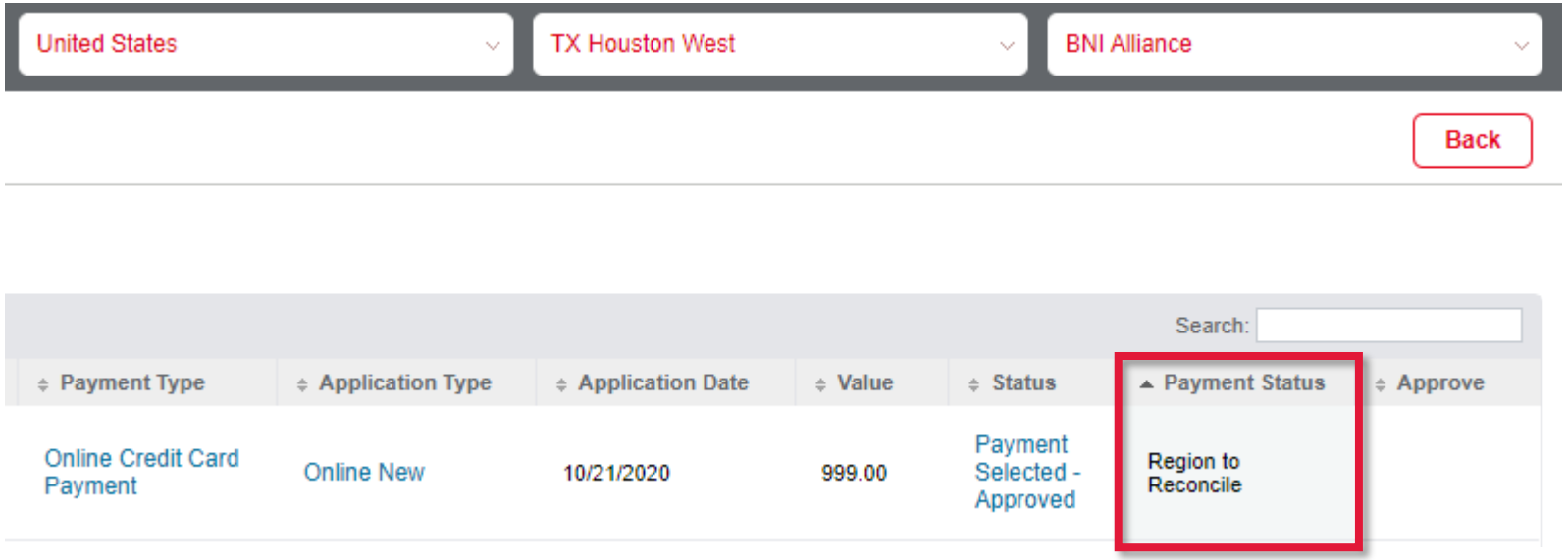


If the Payment Status is: “Region to Confirm”

Payment was not successful

LD to submit a ticket to regionaloffice.bni.com

Payment Status: Region to Reconcile

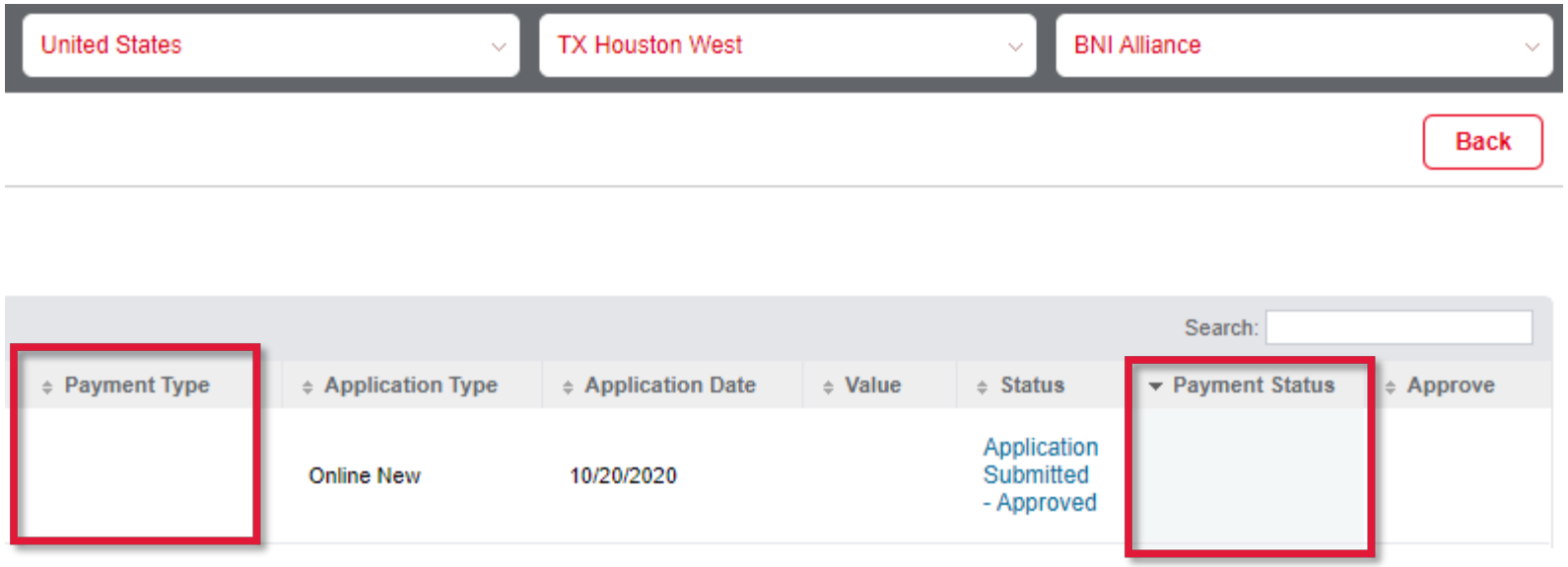


If the Payment Status is: Region to Reconcile

The transaction was accepted

No action needed by LD

Payment Status: Section is Empty, and Payment Type is Empty

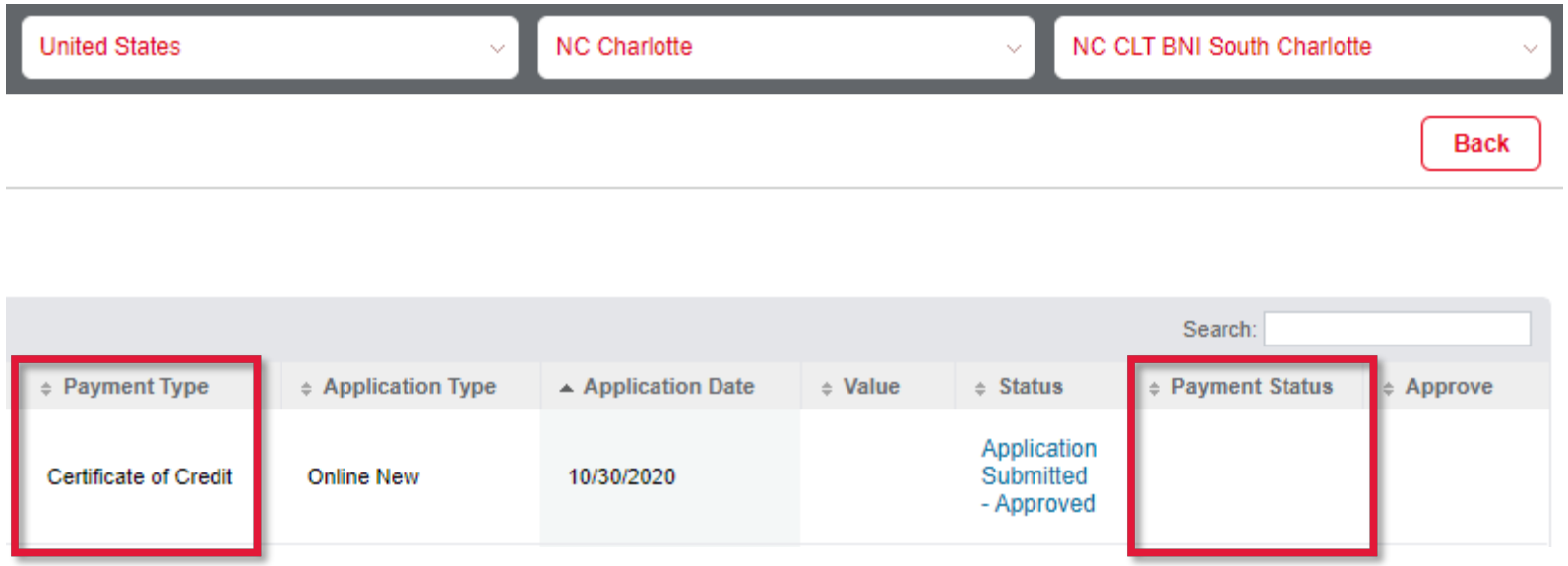


If the Payment status section and payment type are empty

The applicant has not attempted payment

LD to reach out to applicant to submit payment

Payment Status: Section is Empty, and Payment Type is Certificate of Credit



If the Payment status section is empty and payment type is COC

LD to submit a ticket to regionaloffice.bni.com to confirm with the Ops Team that the applicant has a COC to use.

Action Needed

- The Launch Director should be checking the Chapter Pending Application screen 2-3 times a week to ensure applicants are submitting payment
  - Operations> Chapter> Manage Members> View Pending Applications
- When the group has 17 applicants, submit a tracker to regionaloffice.bni.com to launch the Chapter!

If you come across a scenario not explained above, please submit a ticket to regionaloffice.bni.com