



## **Updated Launch Process – Effective 10.1.20**

### **Launch Director**

1. Launch Director collects 5 approved applicants in unique seats and directs them to complete the Launch Commitment Form on the website
  - a. Direct applicants to put the Launch Director's email in the form to ensure the Launch Director receives a copy of the submitted form
2. When the LD has 5 approved, unique applicants who have completed the commitment form, please submit the following to regionaloffice.bni.com:
  - a. Launch Tracker confirming the 5 applicants (tracker found on website)
  - b. The name of the Launch Director who will be approving online applications in BNI Connect moving forward
  - c. The name of the Core Group, meeting time, meeting location, and area in BNI Connect the group should be entered under
3. Once Core Group is in BNI Connect, please instruct applicants to submit their online application using the "Apply for Membership" function on their Regional website
  - a. The Launch Director will access the approval screen in BNI Connect under Operations>Chapter>Manage Memberships>View Pending Applications
4. The Launch Director reviews all applications and follows the same interview process as usual
  - a. If approved, mark as approved in BNI Connect and a payment link will be sent to the applicant to submit payment
    - i. The Launch Director will 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 for the Ops coordinator to verify all applicants
  - a. Please give 24 hours for the Ops Coordinator to review the tracker before giving the approval for launch

### **Operations Coordinator**

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