



Launch Application Process

Working with the Operations Team

Launch Success Coach

1. Launch Success Coach collects 5 approved applicants.
2. LSC submits the following to regionaloffice.bni.com
 - a. Launch Tracker confirming the 5 applicants ([Click here to get tracker in TEAMS](#)) Be sure to fill out the Operations tab completely.
 - b. Name of the LSC who will be approving online applications in BNI Connect moving forward.

Please note: If an accepted and paid applicant chooses to leave the Core Group before chartering, the Application Fee is non-refundable. Once the Chapter charters in BNI Connect, both the Application and Membership Fees are non-refundable.

3. Once Core Group is in BNI Connect, LSC instructs applicants to submit their online applications using the “Apply for Membership” function on their Regional website.
 - a. LSC will be given access to view and approve all applications to this Core Group. Pending Applications are located in Connect: Operations > Chapter > Manage Memberships > View Pending Applications
4. LSC reviews all applications and follows the vetting process including an interview and reference checks. If approved, mark as approved in BNI Connect.
 - a. Access the approval screen in BNI Connect under Operations > Chapter > Manage Memberships > View Pending Applications
5. If the Core Group is anticipated to charter soon, EMAIL the TRACKER to the Ops Team in advance to alert them of the anticipated date to reach 20 completed applications. This will allow them to make sure applications and payments are matched and have fewer delays. You're your tracker up-to-date and email to Ops Team once you believe 20 applications are approved AND paid.
6. Once a chapter has 20 paid and approved applications 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 charter/launch.

Tip: Avoid Delays! The better the communication with the OPS team and your applicants, the easier and faster the process will be when it is time to charter/launch!



How to Launch a Chapter



Process to Launching a Chapter

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

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

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

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

**Further details in subsequent slides*

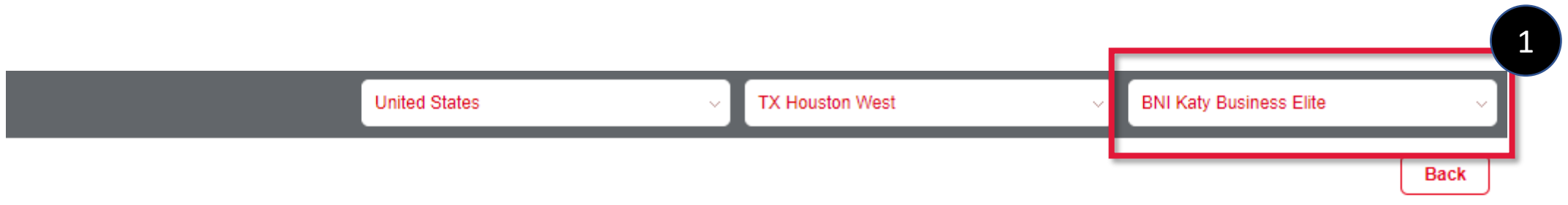
Chapter Pending Application Screen

- The Chapter Pending Application screen will allow the LSC to see all the applications for their Forming Chapter, approve applications, and see if payment was submitted
- The LSC can access the screen on BNI Connect by going to:
 - Operations> Chapter> Manage Members> View Pending Applications

The screenshot shows the BNI Connect interface. At the top, a red navigation bar contains the following menu items: NETWORK, OPERATIONS (highlighted with a red box and callout 1), REPORTS, TOOLS, and ADMIN. To the right of the navigation bar are icons for notifications (1), search, print, and help. Below the navigation bar, there are three dropdown menus: 'United States', 'AR Arkansas East', and 'B2B Network Professionals'. The main content area is divided into two columns. The left column is titled 'Operations View Actions by:' and has two sub-sections: 'Region' and 'Chapter'. Under 'Region', there are links for 'Manage Visitors', 'Meeting Management', 'Manage Memberships' (highlighted with a red box and callout 2), 'Manage Goals', 'Mentoring Program', 'Create Email', and 'Manage News'. Under 'Chapter', there are links for 'Manage Members', 'Enter New Application', and 'View Pending Applications' (highlighted with a red box and callout 3). The right column is titled 'Updates' and contains the text '> There are no updates.' Below this are sections for 'Upcoming Events', 'Documents', and 'Unread Messages', each with an upward-pointing arrow.

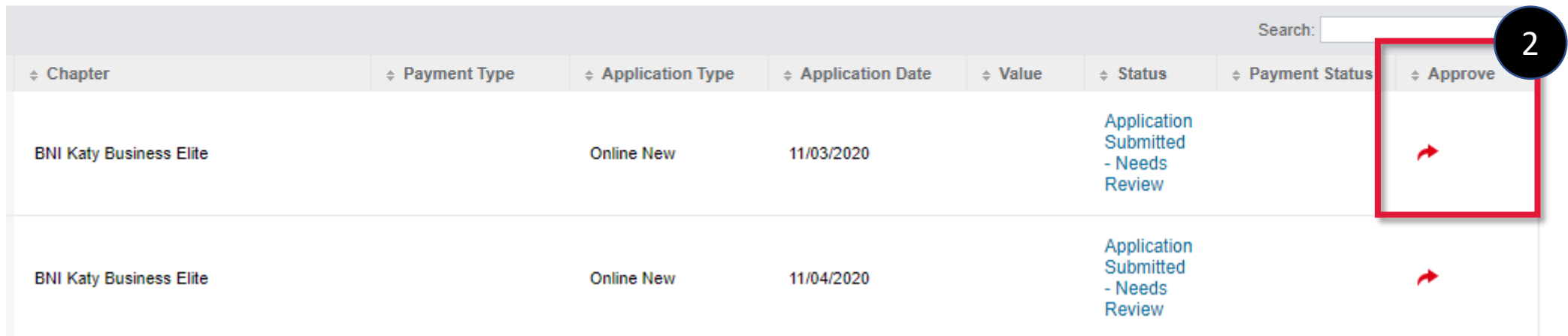
How Do I Access Applications?

- On the Chapter Pending Application screen, the LSC 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



United States TX Houston West BNI Katy Business Elite

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Chapter	Payment Type	Application Type	Application Date	Value	Status	Payment Status	Approve
BNI Katy Business Elite		Online New	11/03/2020		Application Submitted - Needs Review		→
BNI Katy Business Elite		Online New	11/04/2020		Application Submitted - Needs Review		→

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

The screenshot shows a web application interface for reviewing and approving applications. At the top, there are three dropdown menus: "Select Country", "Select Region", and "Select Chapter/Core Group". Below these is a "Back" button. The main content area displays application details: "Membership Term" (24 Months), "Induction Date" (11/03/2020), and "Have a CofC" (No). A red box labeled "1" highlights a PDF icon with the text "Click here to review the full application form". To the right, another red box labeled "2" highlights two red buttons: "Approve" and "Decline".

Field	Value
Membership Term	24 Months
Induction Date	11/03/2020
Have a CofC	No

Click here to review the full application form

Approve Decline

What Happens Next?

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

SUBMIT PAYMENT

How Do I Know If Payment Was Submitted?

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

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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

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Payment Type	Application Type	Application Date	Value	Status	Payment Status	Approve
Other	Online New	10/14/2020	999.00	Payment Selected - Approved	Region to Confirm	

If the Payment Status is: "Region to Confirm"

Payment was not successful

LSC to submit a ticket to regionaloffice.bni.com

Payment Status: Region to Reconcile

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Payment Type	Application Type	Application Date	Value	Status	Payment Status	Approve
Online Credit Card Payment	Online New	10/21/2020	999.00	Payment Selected - Approved	Region to Reconcile	

If the Payment Status is: Region to Reconcile

The transaction was accepted

No action needed by LSC

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

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Payment Type	Application Type	Application Date	Value	Status	Payment Status	Approve
	Online New	10/20/2020		Application Submitted - Approved		

If the Payment status section and payment type are empty

The applicant has not attempted payment

LSC to reach out to applicant to submit payment

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

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Payment Type	Application Type	Application Date	Value	Status	Payment Status	Approve
Certificate of Credit	Online New	10/30/2020		Application Submitted - Approved		

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

LSC 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 LSC 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 20 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

