CARKET CHAMBER

# NEW chamber onboarding process (approx. 30min)



# Chamber onboarding link

#### Self onboarding step-by-step

Follow the <u>chamber onboarding link</u> to begin the onboarding process with the assets you have filed. <u>You will NOT be able</u> <u>to add chamber membership info later, so</u> <u>be sure to complete this during sign up.</u> Once you have complete the onboarding process, ACC will be notified and will approve your chamber profile.



#### Prepare for onboarding

#### Collect & file assets in a file folder:

- 1. Welcome page/about us text in a word document.
- 2. Social media platform information.
- 3. Chamber address, website, phone & email address.
- 4. Membership types (name, price, frequency, description).
- 5. Logo: <u>Vertical: 400X400px vector png</u>. <u>Horizontal: 400X200px vector png</u>.
- 6. Banner 1950x1000px vector jpg.
- 7. About/Contact Photo (1950x540px jpg).
- 8. Banking information.

## **Account settings**

#### Log in, review and update!

- 1. Log into ChamberMarket.ca.
- 2. Go to account settings to update your business profile, add additional staff & grant admin permissions.
- Click on products/services to <u>update</u> <u>your direct deposit information</u> (used to process memberships and deposit non-dues revenues from other

sources to your account). \*Chambers <u>do not</u> need a Bambora account until we integrate events, sponsorships, etc. into the system in a few months.



#### Your dashboard

#### **Review account & reports**

Visit your <u>dashboard</u> to update your profile, change your password, view memberships, manage chamber details, add photos, add staff photos, run reports, and <u>run quality control for businesses and</u> <u>products.</u>

Click on 'Manage Chamber' to <u>update</u> <u>information and add photos</u> to your checkout message, welcome page, about page, logo, banner and contact photos. Review businesses listed under your chamber, invite businesses to join and add businesses to your account.



## **Create Business listings**

#### **Begin onboard businesses**

Accelerate the business onboarding experience by directly engaging the businesses and doing the heavy lifting. <u>Spend less time selling by removing the</u> <u>sales process.</u>

# Shop Local Everywhere

CARKET CHAMBER

Set your **launch date, preload vendors and products,** accelerate the business onboarding experience then **celebrate your launch**!



# The business profile

#### Collect business details

Enter their full business details including contact information, logo (templates: <u>vertical stacked/horizontal</u>) and social media handles (from your membership listing). <u>Create their banner from the</u> <u>template</u>. Skip the vendor merchant (Bambora) application.



# **Products and services**

Upload photos and descriptions

# Engage to spend less time selling by removing the sales process.

#### Create the businesses account

Strategically evaluate who your <u>top 15+</u> <u>businesses</u> you want to see on ChamberMarket.ca. Begin the business sign-up process by <u>creating a new account</u> <u>for each of these businesses</u> using an imaginary temporary email and a temporary password for the 'representative'



# **Proactive approach**

## **Collect feature products**

Approach the business to let them know you would like to create exposure for their business. You will do ALL the heavy lifting. Go to the business, <u>collect the information</u> <u>on 1-3 products or services</u> they wish to feature (they can add/import more later). <u>Take/edit photos and develop listing</u> <u>descriptions (template)</u>. Use CanvaPro to remove backgrounds on supplied photos!



Upload 1-3 products or services to the business account with descriptions and delivery options so when your chamber goes live in your community, you have a <u>solid listing of businesses as well as</u> <u>products/services</u> already populated. ("if you build it, they will come" ~ field of dreams)



## **Tools for Success**

#### Scripts & Resources for Connecting

<u>SCRIPT 1 - Chamber Market Onboarding</u> <u>SCRIPT 2 - Meeting Prep Email</u> <u>SCRIPT 3 - Bambora Application Meeting</u> <u>Application Process</u>

- <u>Application roces</u>
  <u>PCI Compliance</u>
- <u>Unqualified Merchants</u>
- <u>Onquaimed Merchants</u>
- <u>Restricted Merchants Paper TD Setup FREE</u>
- Restricted Merchants Paper TD Setup \$25 SCRIPT 4 - Meeting Follow-up Email How to Upload Products Delivery Options E-Commerce Fee Comparison ChamberMarket Canva Assets

## Hand over business account

#### Connect with the business

Let the business know you set them up and they are ready to go on our new ecommerce platform where, together, we can grow their exposure. We are almost ready to go live!

All that is needed to <u>transfer and activate</u> <u>their account</u> is to (we recommend doing this together with them):

- 1. Review their product listings & confirm their business details.
- 2. Change the temporary email to the business 'representative' email.
- 3. Help them change their temporary password to their own.
- 4. Ask "Are you hiring?" and collect job posting for Talinity send to ACC.
- 5. Complete their Bambora account set up (FREE if activated for your chamber, using code SHOPLOCAL).
- 6. <u>Launch! Approve business account and</u> <u>product listings</u> once Bambora has confirmed the account is set up.

# Shop Local Everywhere