

WHOLIVES CORPORATE



PROGRAM

Step-by-Step On-Boarding for Ambassadors

(Send Melissa a message on Slack if you have any questions and after you've check all the boxes at the left of each step.)

- Like us on **Facebook** and follow us on **Instagram**.
- Send Melissa your full address, personal email and social media handles to Melissa@WHOLives.org so we can initiate the onboarding process and set you up to receive your commission for events.
- SET UP YOUR PAYMENT PORTAL:** You'll receive an email from **Gusto**, our online payroll software, Open that email, create an account, and put in your information to receive payment for your fundraising efforts.
- SET UP YOUR EMAIL:** Next, we will send you an email from **G-Suite**. Change your password, and log in to your WHOLives email account. You can forward messages from your WHOLives account to your personal email, but this will be our main form of communication.

Add your email signature as follows (See example on next page):

- Click the Settings gear in your **Gmail** toolbar.
- Select Settings from the menu that will have appeared.
- Go to General.
- Make sure the desired account is selected under **Signature**:
- Copy and paste the **signature info below** in the text field.
- Click Save Changes

Name Here, WHOlives Ambassador

WHOlives.org

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WHO lives | **THE VILLAGE DRILL**

This message (including any attachments) may contain confidential, proprietary, privileged and/or private information. The information is intended to be for the use of the individual or entity designated above. If you are not the intended recipient of this message, please notify the sender immediately, and delete the message and any attachments. Any disclosure, reproduction, distribution or other use of this message or any attachments by an individual or entity other than the intended recipient is prohibited.



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- GET CREDIT FOR YOUR EFFORTS:** We use **MobileCause**, a fundraising software for non-profits, to keep a tally of all the donors your work with and the total amount of donations they give. Text Drink to the number 71777 and follow the steps to sign up as a Fundraiser. Leave the goal at \$100,000. The number and URL that is assigned to you will be used to track all your fundraising activities. For example, your number could be Drink08. Every time you ask someone to donate, they need to text 71777 and in the message type Drink08. This donation will be assigned to your name.
 - ORDER BUSINESS CARDS:** <https://wholives.go.customprintcenter.com/register> . You'll need to register first. Then select the Social Impact Business card. For the front and the back, uncheck the box that says "Use Company Defaults" to finish customizing your card. Complete the online process to order your cards and have them delivered to your home.
 - COMMUNICATE WITH YOUR AMBASSADOR GROUP:** We'll be using **Slack**, an online collaboration tool for most of our group communication. **Melissa will send an invite to your WHOlives email account.** Click the link in the email to sign up. Please

download Slack to your phone and check it regularly for communication and answers to your questions. Melissa will be checking in there multiple times a day.

COMMUNICATE WITH BUSINESSES: We use MailChimp an online, automated email tool, which offers a free account for users with under 100 contacts. There are instruction for setting up your free MailChimp account in your back office at <https://wholives.org/wp-content/uploads/2018/12/Mailchimp-Setup-Instructions.pdf>. Please read through these instructions. Melissa will be setting a time to get together as a group by phone to set this up all at once. Sonja will send you 2 Mailchimp templates to use at your WHOLives email account.

JOIN THE CONVERSATION: Take a **horizontal** still photo on your phone with you holding a clear glass of water or bottle of water with an interesting environment in the background. For example, if you love cycling, take a picture on a trail with your bike.

1. Introduce yourself using your first name.
2. Briefly tell about the WHOLives' cause to bring clean water to the world.
3. Explain why you're excited to join us.
4. Ask people to learn more at WHOLives.org or donate at 71777, typing the message Drink(your number here). All these donations will be credited to your account.

Send your photo and video for approval to shelby@avenuemediastrategy.com and Melissa@WHOLives.org. Then share it on your social media!

TRACK YOUR PROGRESS: Melissa will be sending you a weekly activity tracker to track the activities that you do each week, and the outcomes of those activities. This the best way for us to stay up to date on what's working and what's not working when we touch base. Please use this. It is crucial to staying on track and ensuring your success!

NOTIFY US THAT YOU'RE FINISHED ONBOARDING: Send Melissa a message on Slack if you have any questions and when you've checked off all the boxes above for the onboarding process. Refer to the **First Month Instruction Sheet** for next steps.