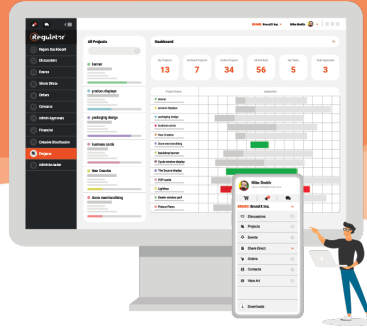


Regulator® | ONBOARDING GUIDE



Welcome to Regulator, where trade marketing precision meets sales tool performance.

This guide is designed to help your brand navigate the process of getting started with Brand Regulator by clearly outlining the necessary steps and identifying the key stakeholders involved in seamlessly building your custom trade marketing solution. With our personal support, we'll have your teams mastering the marketplace in no time.

Phase 1: Administration Tasks

You will need to assign a single primary user [administrator] to act as the liaison for setup. This account administrator will work with your Regulator account manager to ensure everything is in place to move forward. Once all administration tasks in Phase 1 are complete, your brand's Regulator instance will be created, and the primary account administrator will be onboarded into the system.

Process/Steps		Key stakeholders (all steps)
_____	Contracts & NDA Signed	Primary Account User/Administrator [Client] Regulator Account Manager
_____	Budget type [quarterly or yearly]	
_____	Fiscal calendar start date	
_____	Main operating currency	
_____	Onboarding project creation in Regulator	Regulator team

Phase 2: Data - Technical Review and Ingestion

Working with your brand's I.T. and technology teams, the Regulator data team will assist in preparing your complete dealer and associated field team data for ingestion. All project tasks from Phase 2 onward are tracked and managed using Regulator's project tools for real-time status updates and feedback.

Process/Steps	Key stakeholders
ERP/CRM Dealer Data + Associated Reps Delivery of data and review prior to ingestion	Client I.T. Dept. + Primary Account User/Administrator Regulator Account Manager + data team
Dealer Data & Groups - Ingestion & organization Admin Approval chains [Door > Reps > Managers]	Regulator team
Primary Account User/Administrator - onboarding & training sessions	Regulator team

Phase 3: Platform Configuration & Customization

The Regulator team will work with you to configure and customize the platform to meet your specific needs. This includes creating initial Market Check surveys, reporting dashboards, budget structures for users, and other global settings for creating, tracking, and approving orders through Regulator's powerful suite of tools.

Process/Steps	Key stakeholders (all steps)
Market Check survey setup	Primary Account User/Administrator Regulator Team
Dashboard creation	
Marketing Order Types · Custom Print · Digital Art (social) · Video · Fixtures / Display · POP · Promo Product (Retail giveaways / swag) · Field tools (Tents, Flags, etc.)	
Budget structure for tracking	
Creative Distribution (DAM) setup	
Share Direct structure and setup	
Project templates	
Publishing templates	

Phase 4: Field Team Rollout & Training

Once Regulator is configured and ready to be implemented by your organization, we'll onboard your field team members and managing staff, providing personalized training sessions to ensure they can quickly begin operating in the market.

Process/Steps	Key stakeholders (all steps)
Team/Sales Reps - onboarding & training	Regulator Account Manager Regulator team
Managers & support staff - onboarding & training	



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