Onboarding Influencers

Note:

The features described in this article are available to Pro and Premium Influence clients. If you are interested in Influence's full suite, please contact your Customer Success Manager (CSM) for details.

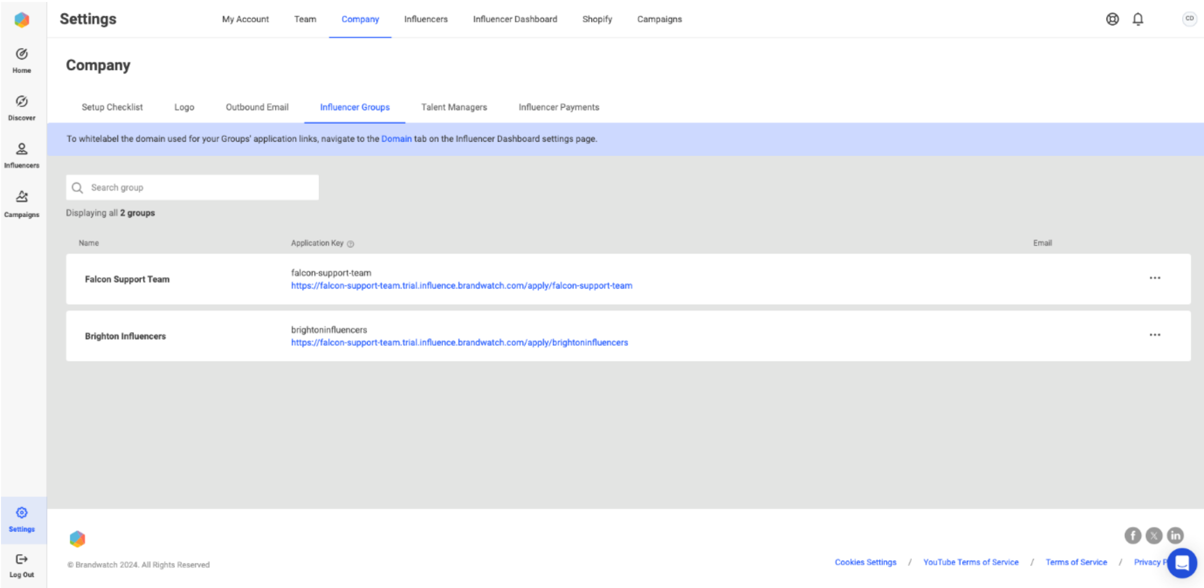
The Onboarding tab in the Influencers CRM allows you to oversee your new influencer applications and manage the onboarding process for those influencers. When onboarding influencers, you'll send them an application to fill out their contact information and connect their social accounts, provide them a contract to sign, customize their communications from the platform, and set up their payment details. In this article, learn about the influencer onboarding process from start to finish.

Sending your application to influencers

There are two ways that you can onboard influencers to your company's influencer roster: you can add influencers and their accounts to your roster manually, or you can invite influencers to submit their information through an online application form.

The benefit of influencers filling out your application is they can provide up-to-date, accurate personal information and authorize their own social media accounts. By comparison, adding influencers manually yourself can relieve some of the setup burden for your influencers and you choose which social media accounts to add for an influencer. Learn more about how to add influencers manually in our Manually Adding and Importing Influencers article.

Each of your influencer groups have their own unique application link that you can share with prospective influencers you would like to work with. If an influencer applies via a group's application link, their application will automatically be placed in that group. You can find your groups' application links in your **Company settings > Influencer Groups tab**. Simply copy the application link you would like to share with your influencers.

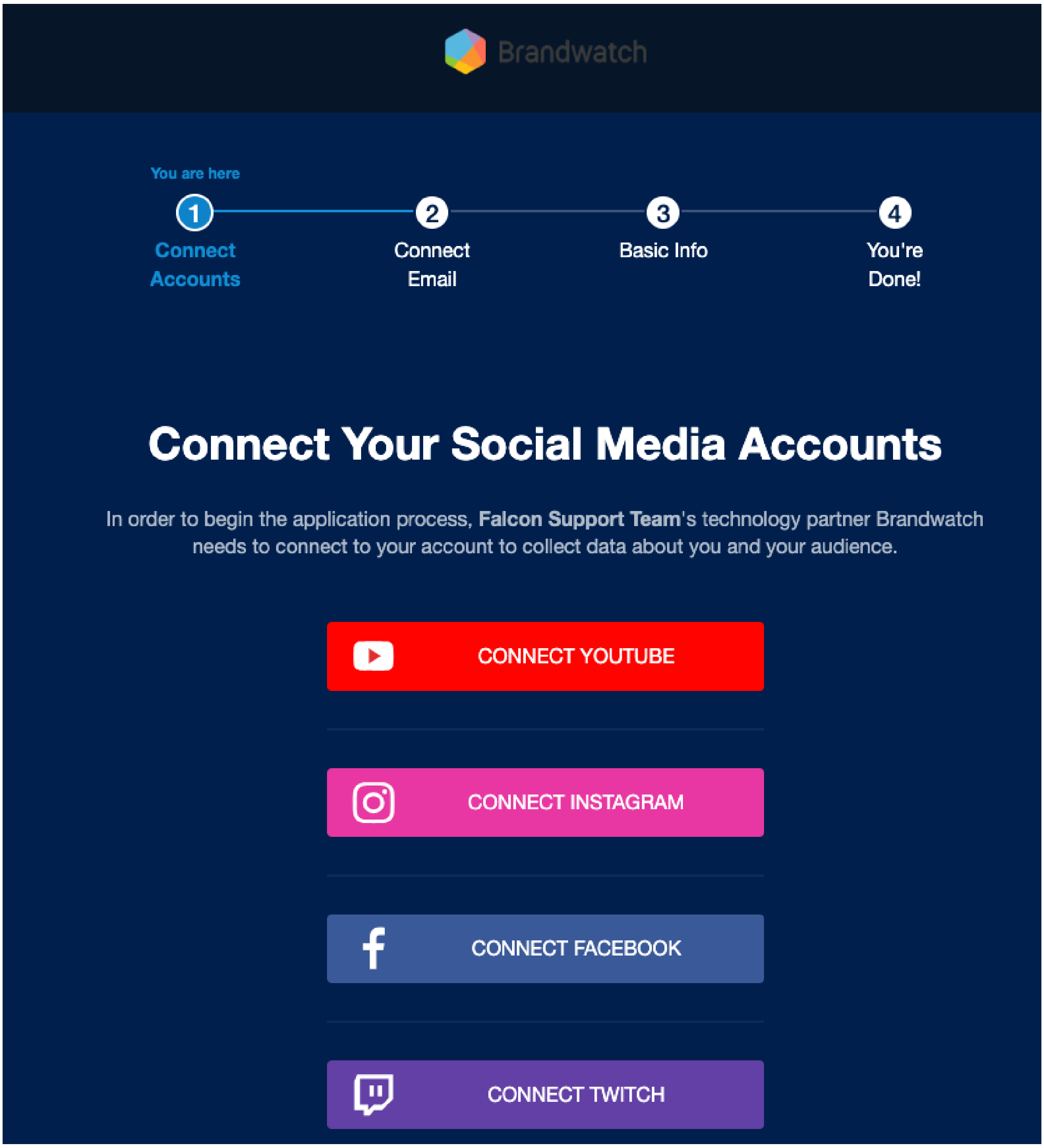


Tip:

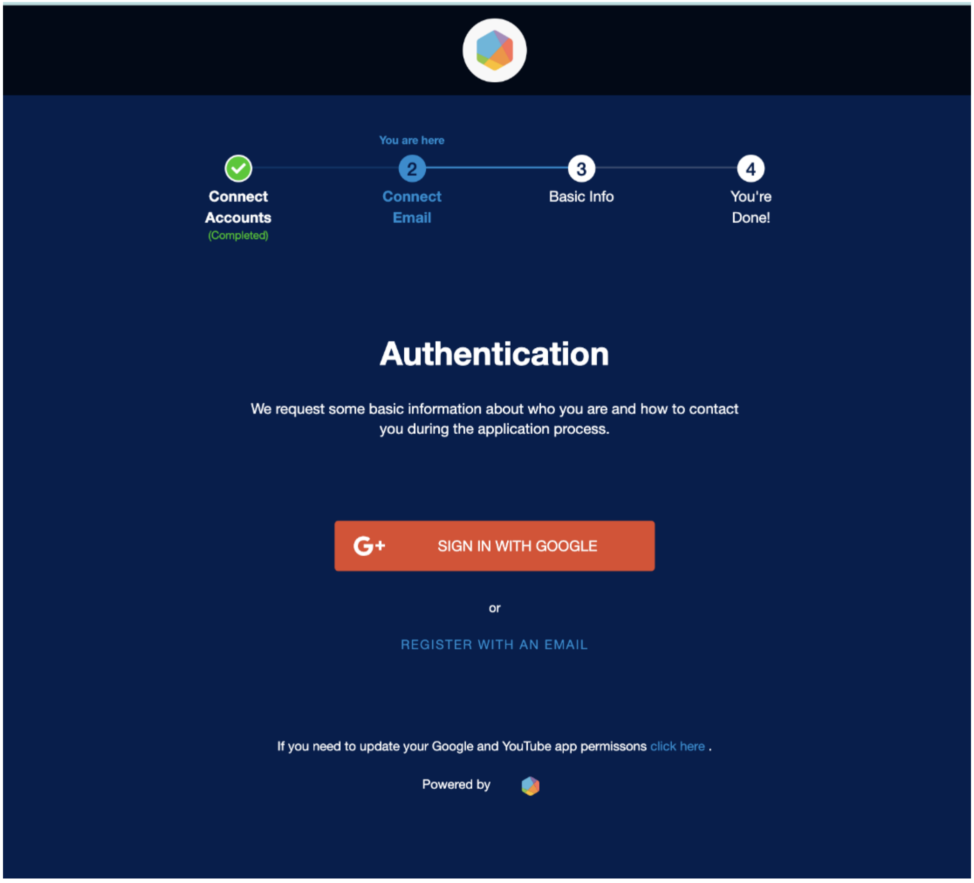
You can customize the aesthetics and some language in your application and onboarding when you click to edit a group under your Company settings. You can also edit which information fields to collect in your application under your **Influencer settings > Application** tab, as well as add custom fields under the Influencer Data tab. Visit our article on Managing Influencer Groups to learn more about customization options for your application.

The application process for influencers

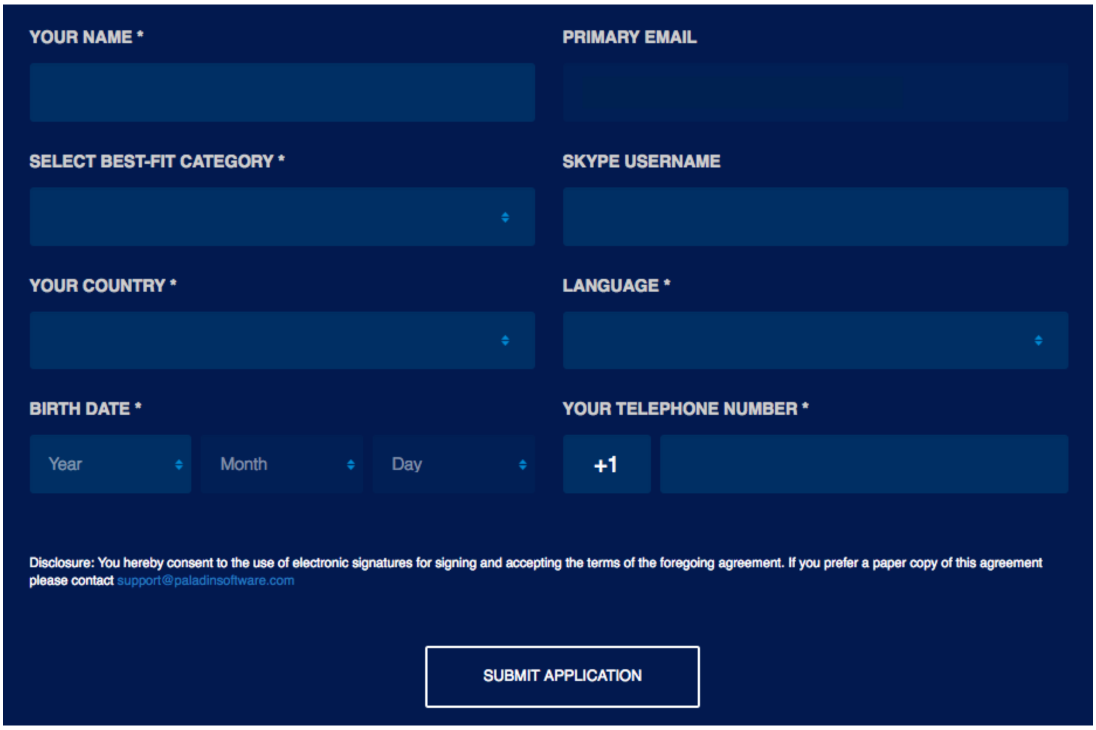
When influencers apply through your online application link, they'll start by connecting their social accounts to Brandwatch. They have the option to connect YouTube, Instagram, Facebook, X (Twitter), Twitch, and TikTok accounts.



Next, influencers must either authenticate in Influence with a Google account or register with an email address to verify that they have a working email address.



On the final step, influencers will fill out information about themselves, including their name, birthday, phone number, etc. The fields will vary based on which information your company has selected to collect in your application.



When the influencer has completed your application, they will see a finalized summary of their submitted application. Once the influencer completes the steps above and submits their application, their account will populate in the Influencers tool under the Onboarding tab with an application state of **Applied**.

Application states

Application states help you keep track of where in the onboarding process each influencer and account is. There is an automated system in place that moves accounts from one application state to another when an action item is completed. You can also move an account to a different state via the Application State dropdown on the Onboarding tab, or under Influencer Details > Accounts in the Influencer's onboarding profile. When you add an account manually, you can place the account in any application state you want.

Note:

If you change an account's application state via the dropdown on the Onboarding tab and select a state with an envelope icon next to the state name, an automatic email will be sent to the influencer. When an influencer moves from one application state to another automatically, an automatic email is sometimes also sent. To check the automated emails that will be sent for each application state and to learn how to change an influencer's application state without sending them an automated email, see the Customizing Automated Emails section below.

The following table describes each of the application states in Influence:

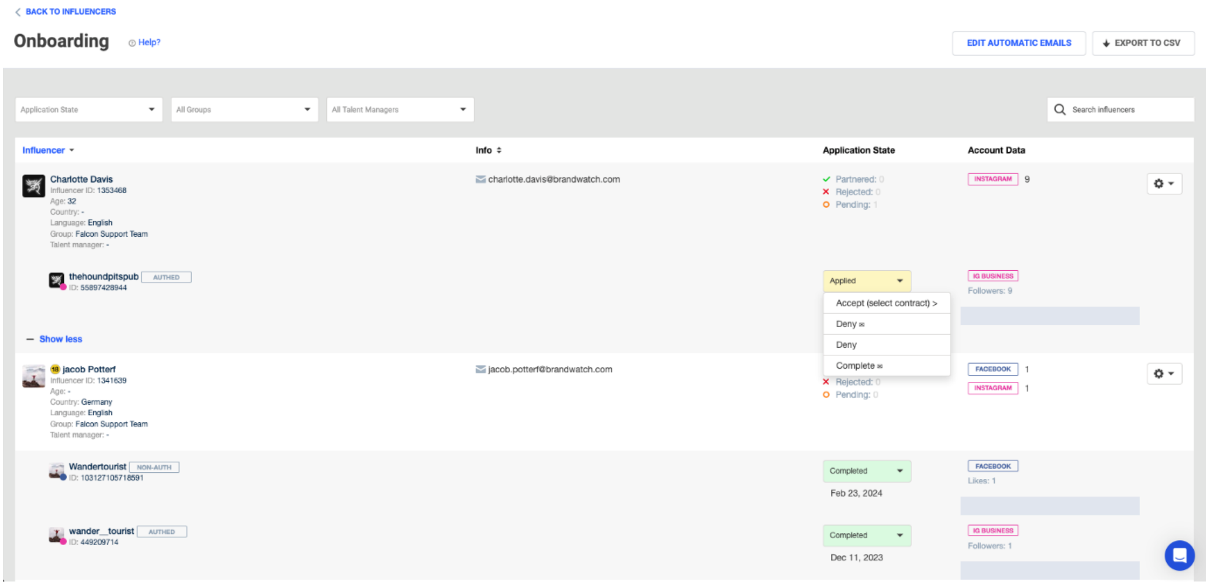
Application State	Description
Prospect	Leads that have been pushed directly from your Locator results to the Influencer dashboard to be considered for a partnership.
Applied	Influencers that have applied for a partnership with your company.
Contract Sent	The contract has been sent to the applicant for signature.
Partner Queue	Influencer has signed your contract and needs to be invited to your CMS on YouTube (if applicable).
Check CMS	The influencer has been invited to the CMS but has not yet accepted.
Complete	The influencer is in CMS and has signed a contract. This influencer is an active partner in the system.

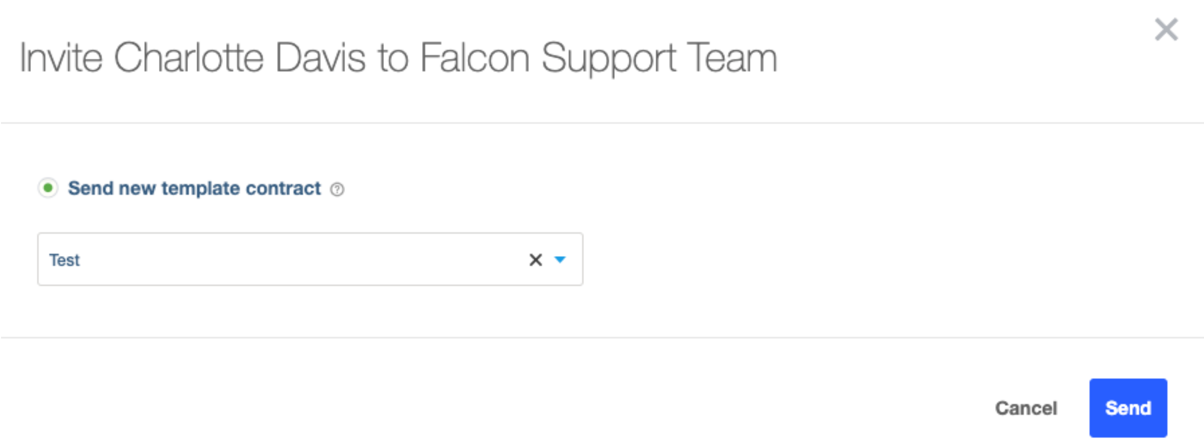
Denied	Applicants who were denied partnership with your company. The Denied state is helpful if you do not want to pursue a partnership with an influencer currently, but may consider partnership with them in future and would like to keep them in your Onboarding list.
Removed	Influencers whose partnership has ended with your company. The Removed state will keep a historical record of the influencer's application and their data will be available when you export a CSV from the Onboarding tab, but it will not include them in your active, i.e. Completed influencer list.
Blacklisted	Influencers who have violated terms and have been blocked from applying for partnership with your company. Influencers will not be able to submit an application, log into the Influencers dashboard, or receive payments from you.
Strike/TOS	Influencers who have received a copyright strike.
With Another Network	Applicants who are currently partnered with another company.
Disabled By YouTube	The Influencer's channel has been disabled by YouTube.
Turn Off/Toggle SuperChat	Applicants who need to disable SuperChat before being added to CMS.
Not in YT PP	Influencers that are not in the YouTube Partner Program.
Ineligible YPP	Influencers that do not meet the requirements to join the YouTube Partner Program.

Sending contracts to influencers

In the **Influencers tool > Onboarding tab**, you can screen all of your influencer applications, view their contact information, and see their social media statistics across any accounts they've connected.

To accept an influencer's application and send them a contract, click the **Applied** state drop-down menu and select either **Accept with default contract** to send the default contract associated with the Group, or **Accept (select contract) >** to select another template contract or upload a custom contract. If you select to choose a specific contract, you will be taken to a selection window to choose from the available contract templates you have uploaded to the system. See the Contract Options section below for more information on uploading template contracts in Influence.



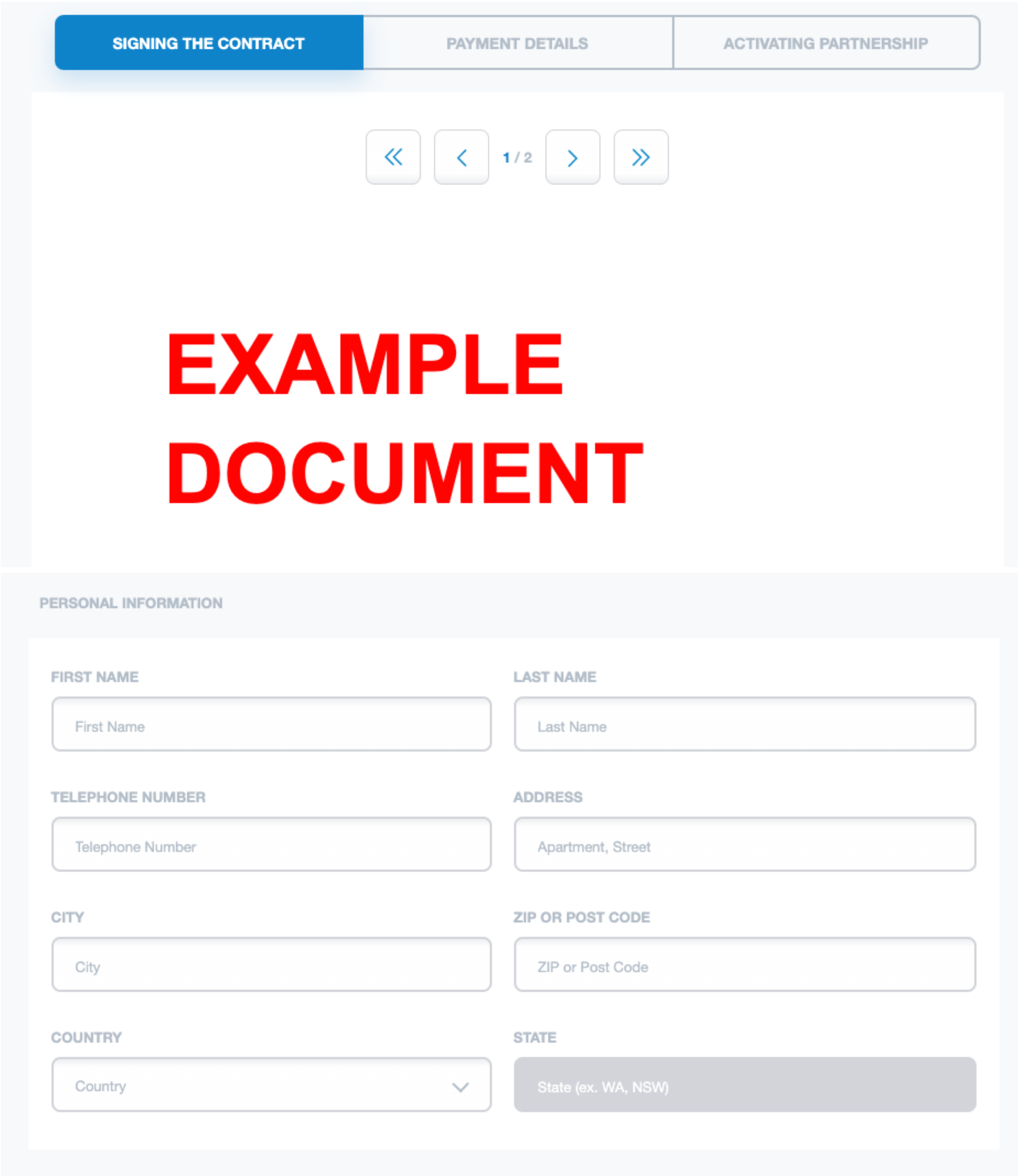


Tip:

If your influencer signs a contract outside of the Influence system, you can also upload an already signed contract to their onboarding profile. See the Contract Options section below to learn more.

Once you have sent a contract to your influencer, they will automatically be moved to the **Contract Sent** state and will receive an email with a link to sign the contract and finish the onboarding process.

The email link will provide a PDF of the contract for the influencer to review and sign. Influencers can read through the entire document and fill out their personal information, which serves as an electronic signature.



Once the influencer has signed and submitted the contract to you, their onboarding process is complete and their account will automatically update to the **Completed** state under the Onboarding tab. They will now appear in your Influencers dashboard. If the influencer connected an Instagram, X (Twitter), Youtube, or Facebook account in their application, they will automatically be authenticated on those social platforms.

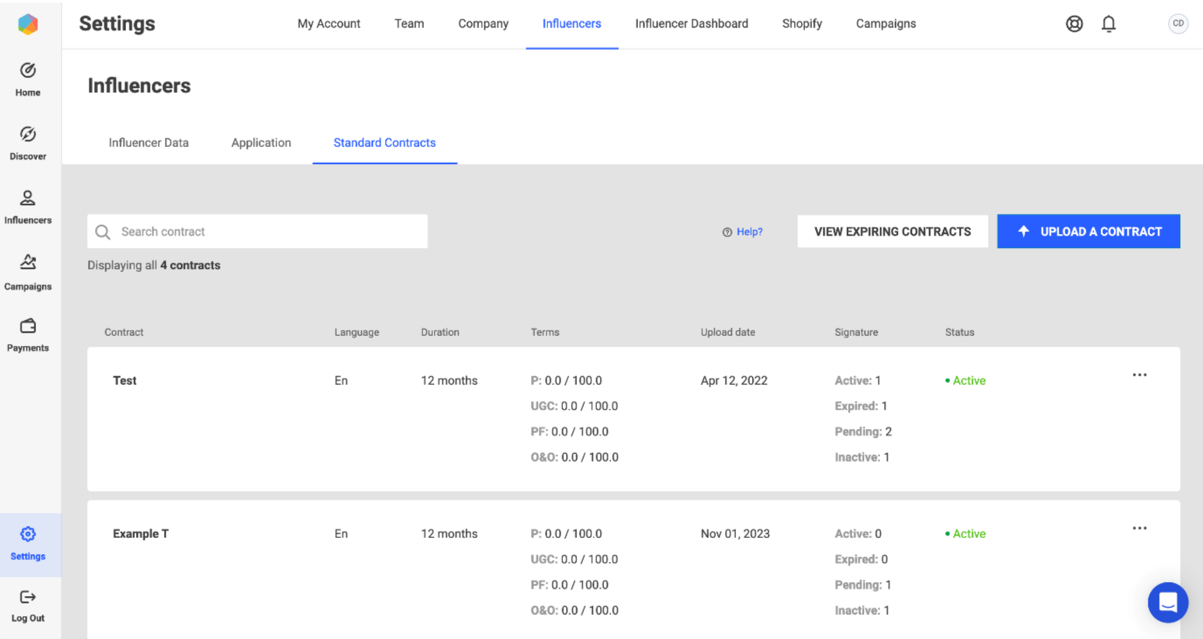
Contract options

If you have partnerships with talent that require contracts, you can both sign and store these contracts in your Influencers dashboard.

Uploading template contracts

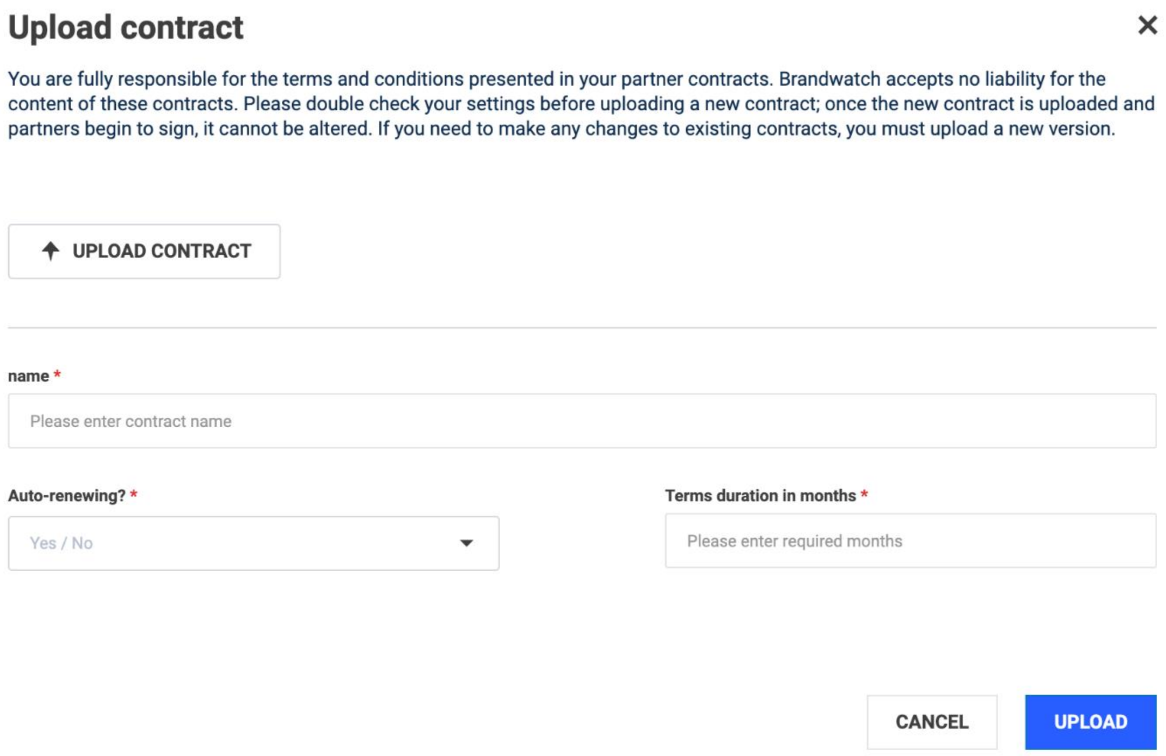
If you have a few types of contracts that you often use for new influencers, you can upload these as template contracts in **Settings > Influencers tab > Standard Contracts tab**. When you have a new influencer applicant, you can easily send one of these template contracts to them without having to find the file in your computer every time.

In the Standard Contracts tab, you'll see a record of all of the standard contracts you have, and whether or not they're currently active or inactive. To upload a new contract, click the **Upload a Contract button** in the top right.



In the Upload Contract window, upload the contract from your computer. Please note that the file must be in PDF format. You can also upload different language versions of your contract. Name your contract, select if it's auto-renewing, and enter the required notice for termination.

Finally, enter the default influencer revenue shares associated with this contract if applicable. These revenue shares will become active for the influencers once they've signed the contract. After you have entered all of your contract settings, click **Upload** at the bottom of the window.



If you use the Group feature in your Onboarding dashboard and there is a contract you want to use specifically for influencers in one group, you can set one of your template contracts as the default contact for that group. Learn more about setting default contracts for groups in our Influencer Groups article.

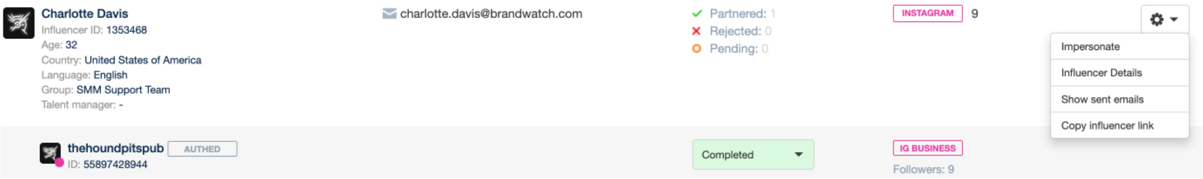
Deactivating and reactivating a template contract

Deactivate template contracts by selecting the **gear icon** to the right of a contract and choosing **Deactivate**. This will change the contract's status to "Inactive" and will not be available to send to new influencers you are onboarding. You can reactivate inactive contracts at any time using the gear icon again.

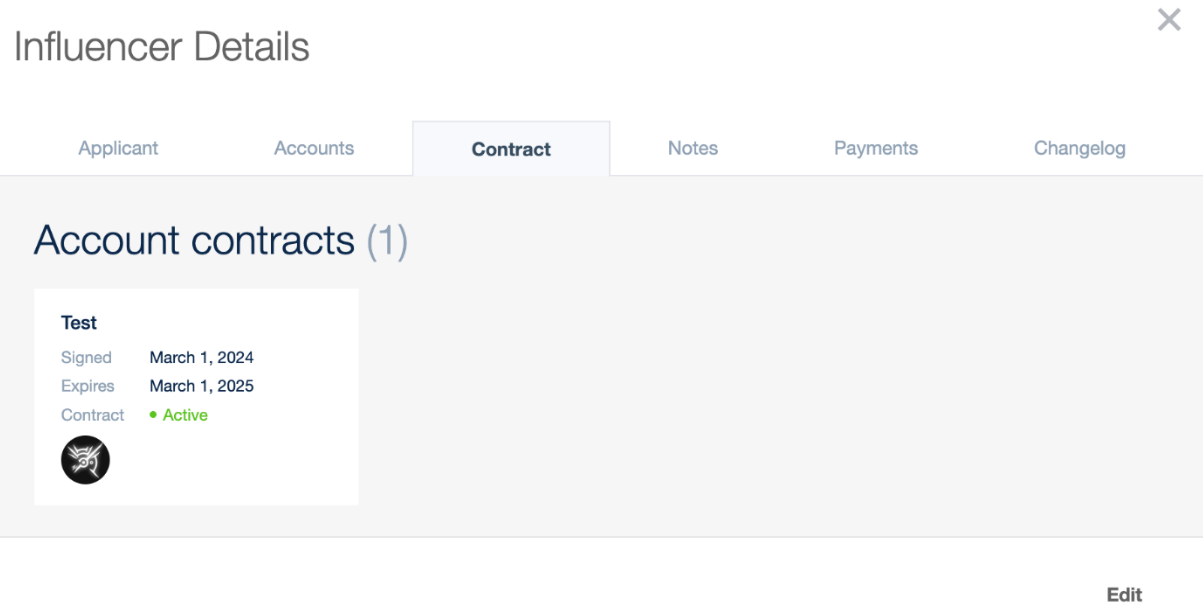
Uploading a custom contract to an influencer’s profile

If you don’t want to use **Accept with default contract >** or the **Accept (select contract) >** options to send your influencer a contract, you can also always upload a custom contract (whether unsigned or already signed) to the Influencer’s onboarding profile via their Influencer Details. You can also use this option for contract renewals.

1. Click the **gear icon** next to an influencer in Onboarding, select **Influencer Details** in the drop-down menu.

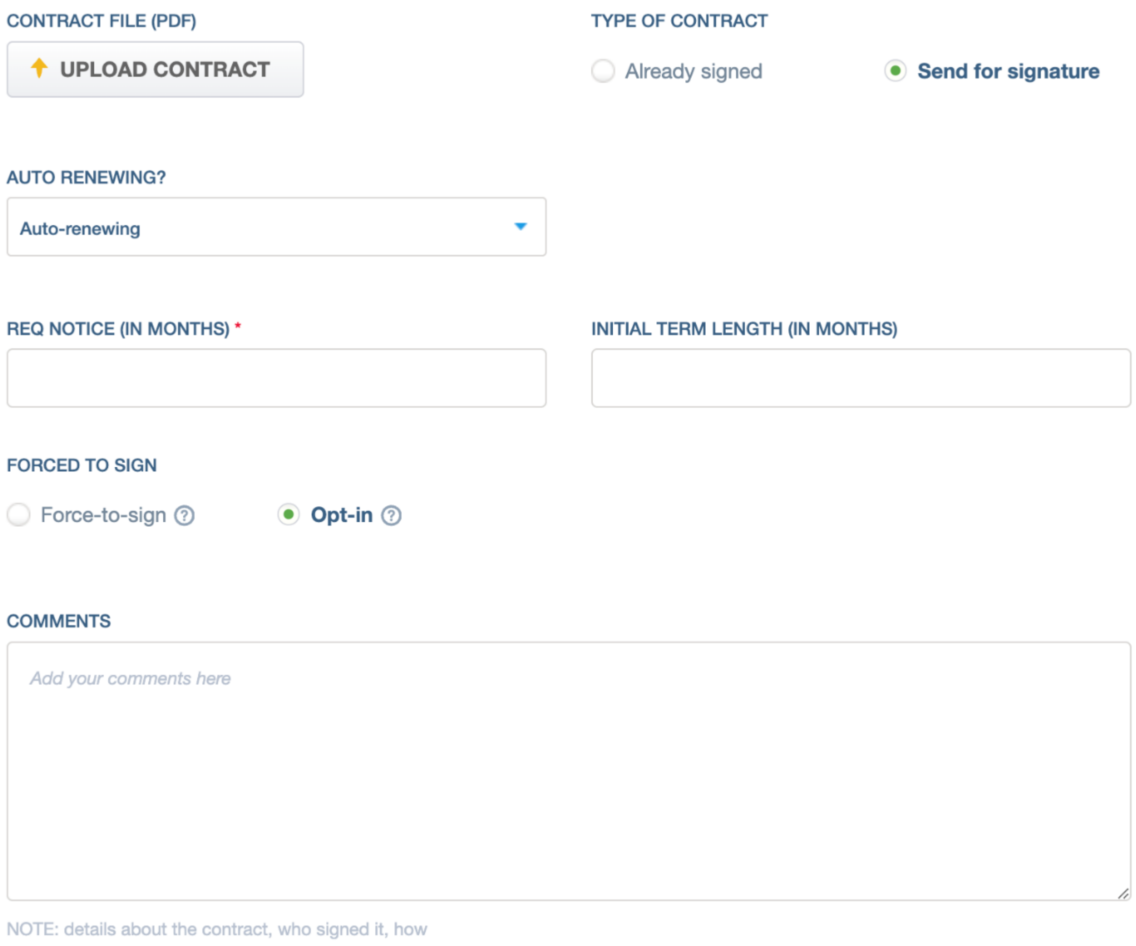


2. View the Contracts tab, and click **Edit** in the lower-right corner.



3. Click **Add New Contract**, and select the **Add new custom contract** option. Under **Type of Contract**, select either the **Already signed** or **Send for signature** option, and upload your contract and complete any additional details

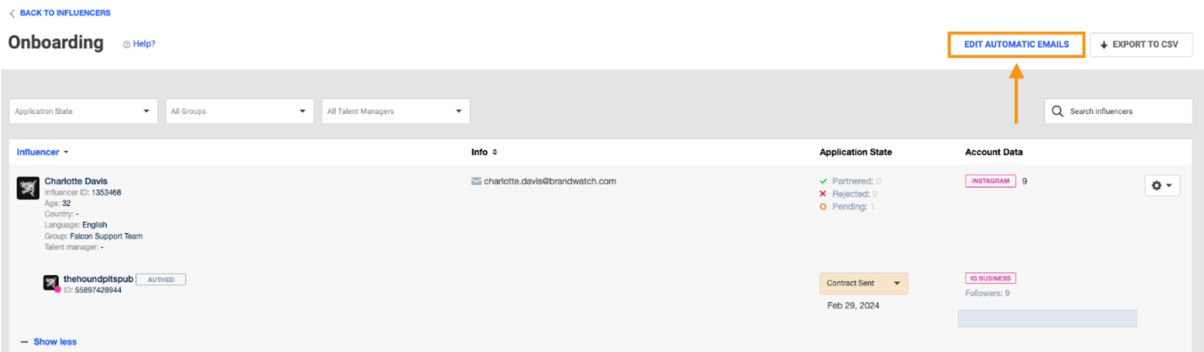
before clicking **Save** at the bottom of the window.



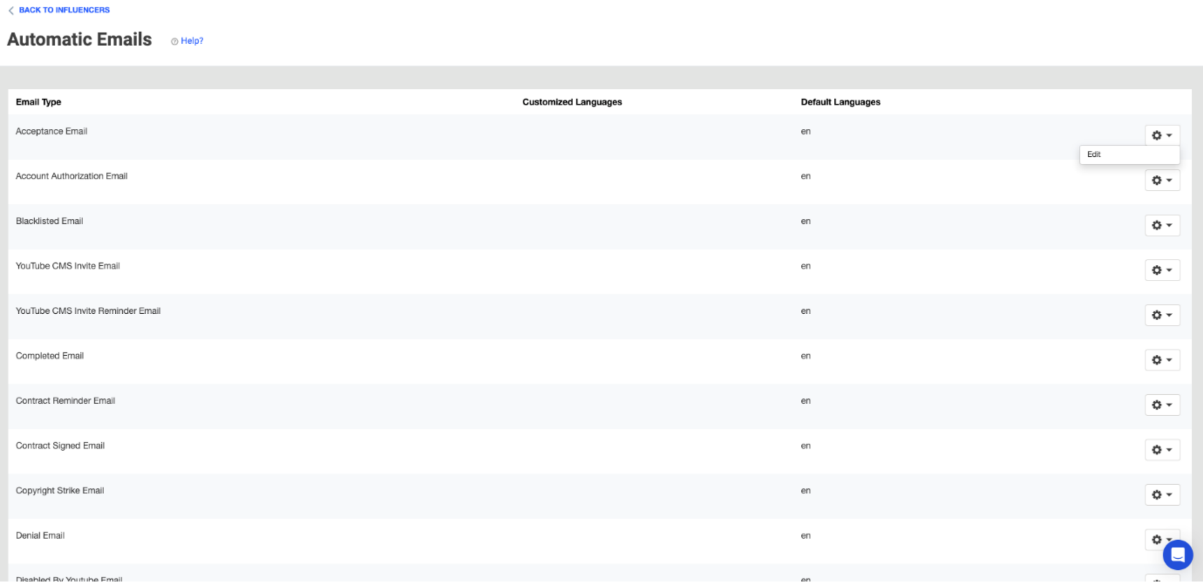
Additional onboarding options

Customizing automated onboarding emails

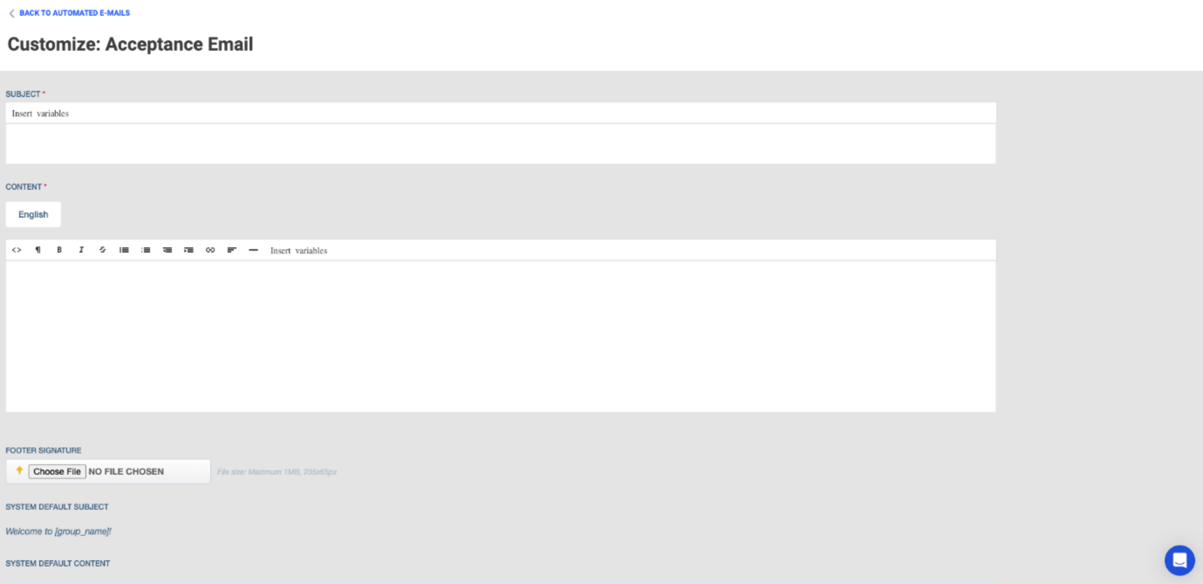
When an influencer is going through the automated onboarding flow, email updates related to the influencer's status may be sent to them as they move from one application state to another. To edit the copy of the default emails that are being sent, click the **Edit automatic emails button** in the top right corner of the Onboarding tab.



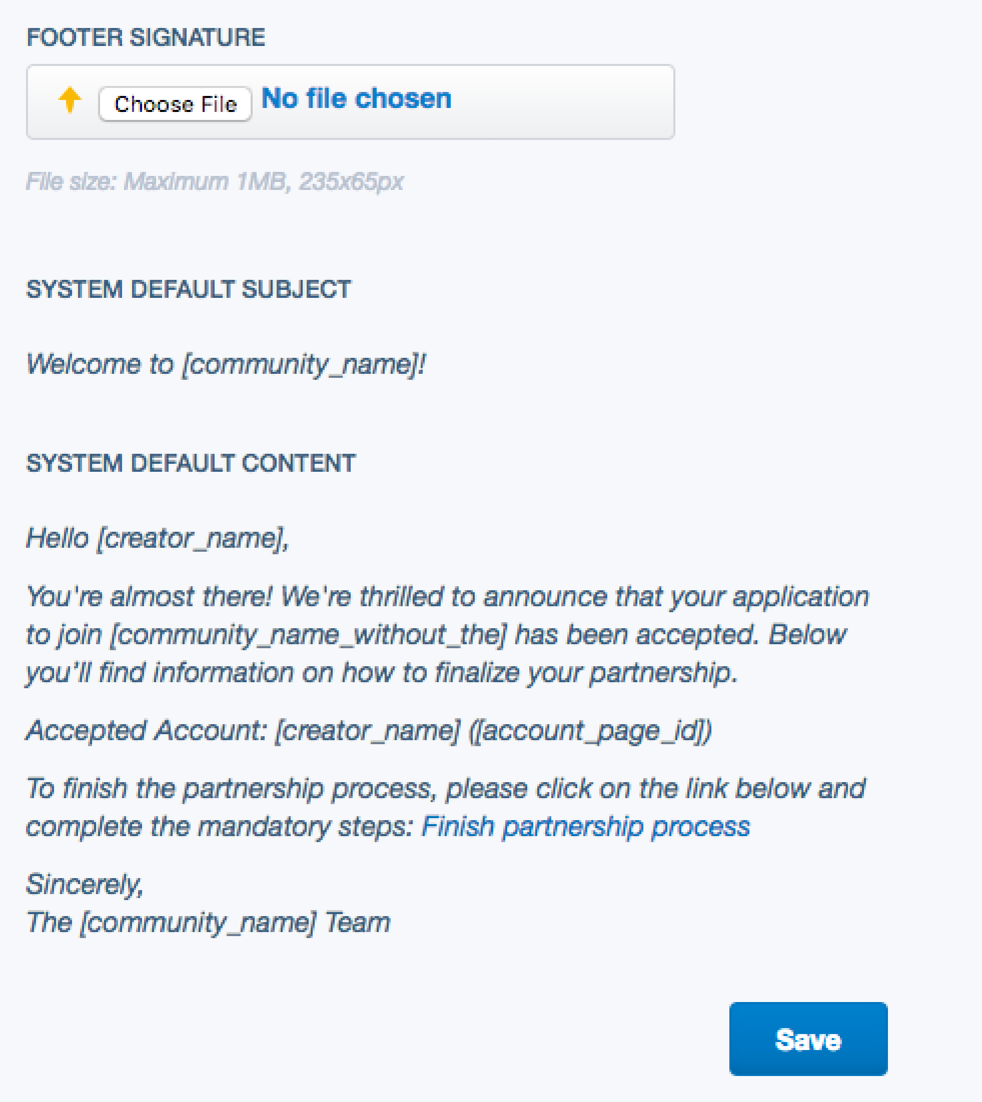
In this menu, you'll find a list of every automated email sent via Influence. To customize an email, click the **gear icon** to the right of an email and select **Edit**.



When editing an email, you can fully customize the subject line and body for each language. You can also insert variables from the list on the right. These variables will automatically update with the proper information depending on the influencer's information, group, accounts, etc. Finally, you can upload a custom signature logo using the **Footer Signature** upload option.



Once you've completed your email customization, click **Save**. The edits will take effect immediately.

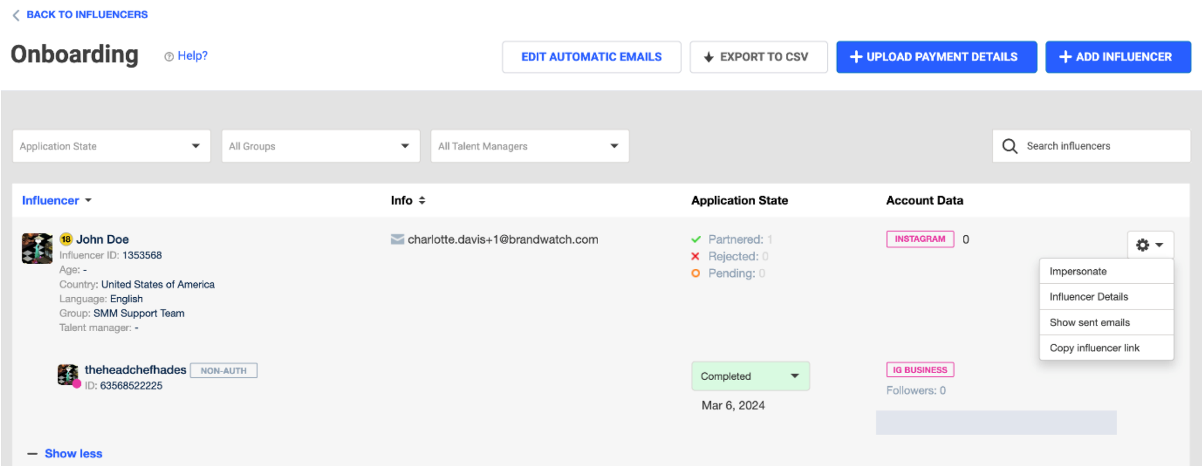


Tip:

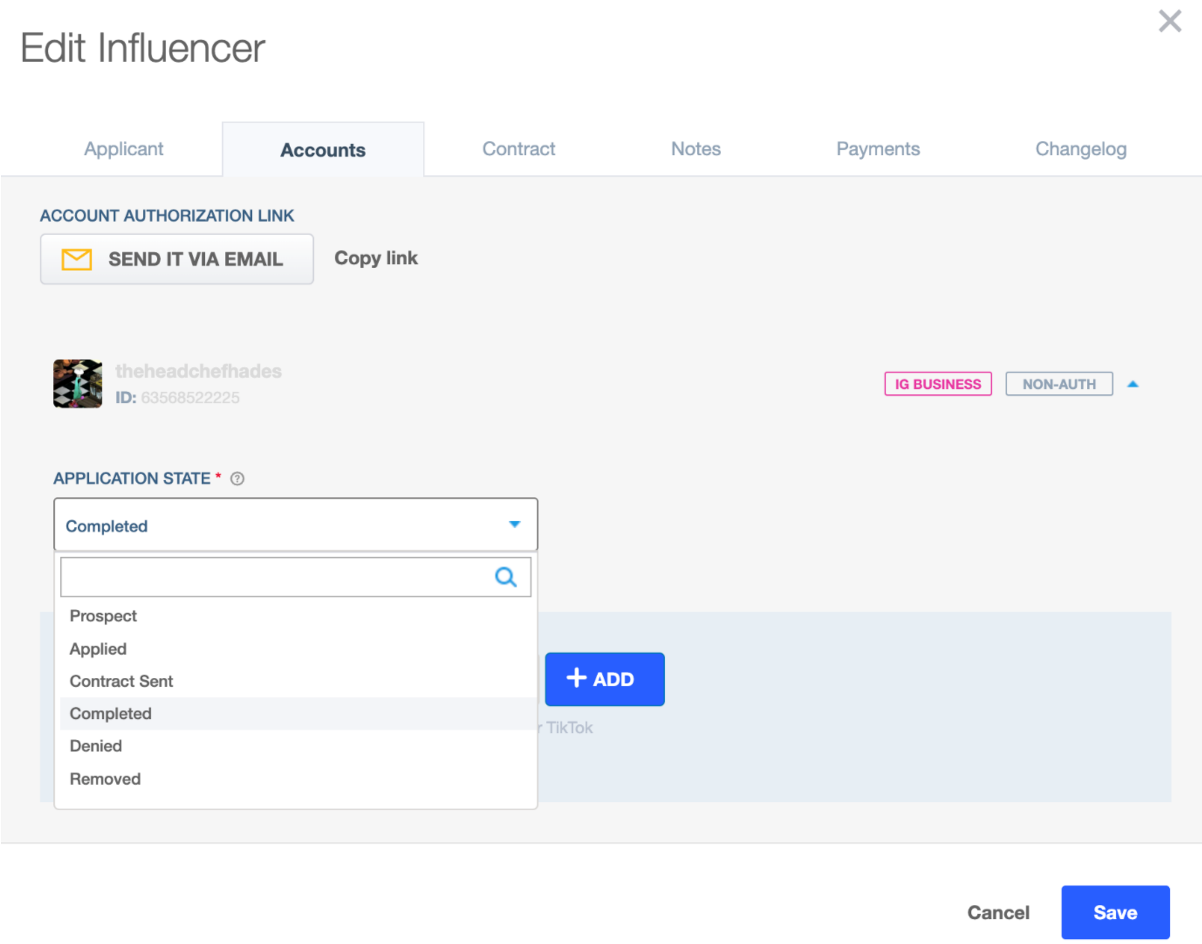
For convenience, the original email text will stay available for each template in case you'd ever like to revert back to the system default email.

Changing a user's application state without sending them an automated email

To edit an influencer's application state without sending them an automated email, click the **gear icon** to the right of an influencer and select **Influencer Details**.



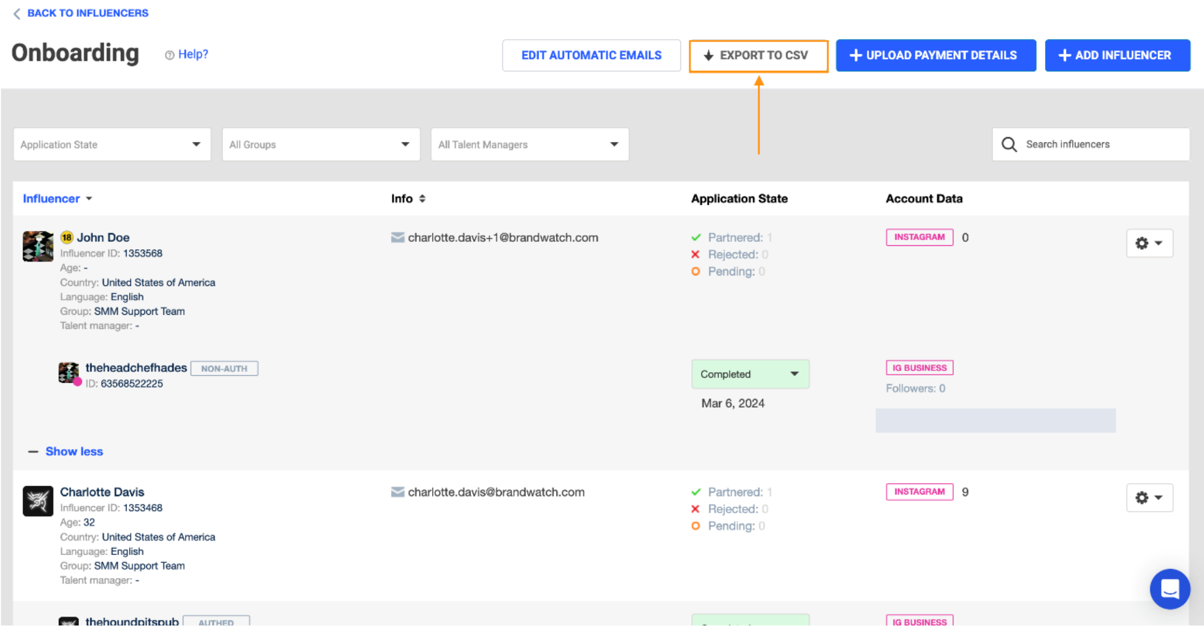
At the bottom of the pop-up window that appears, click the **Edit** button to make changes to the influencer. Once in edit mode, navigate to the **Accounts tab**, select the account you'd like to edit the application state for, choose a new application state under the dropdown, and click **Save**.



By changing the influencer's application state using this method, the influencer's application state will now be updated and an automated email will not be sent to them.

Exporting your onboarding list

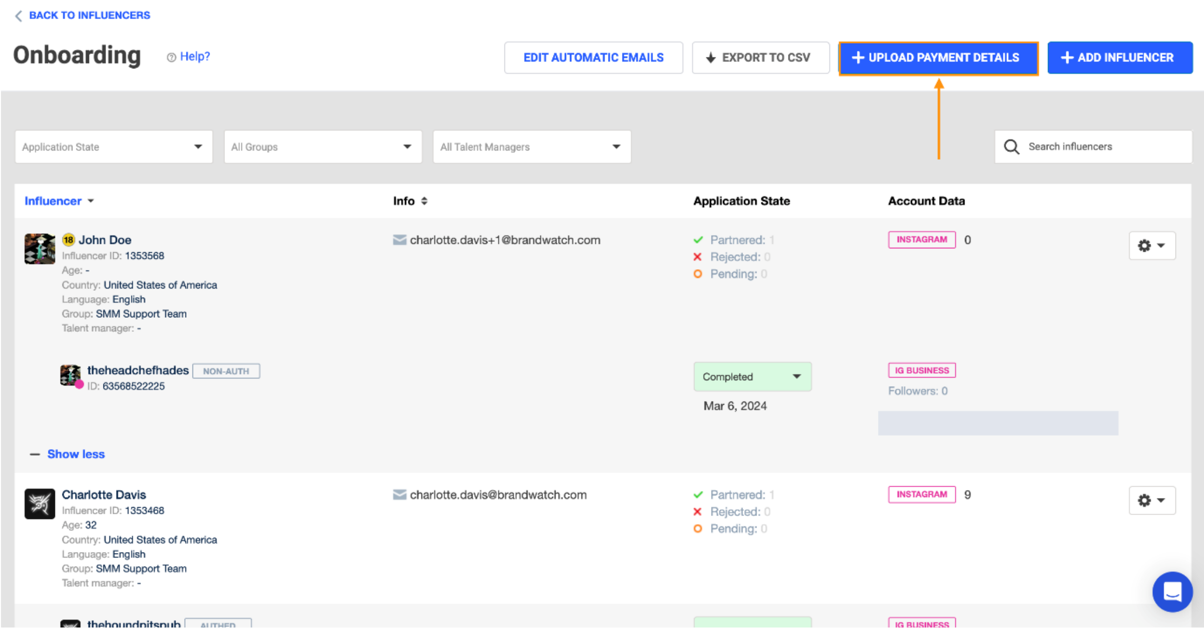
You can conveniently export your list of influencers in the onboarding process by clicking the **Export to CSV button** at the top of the Onboarding tab.



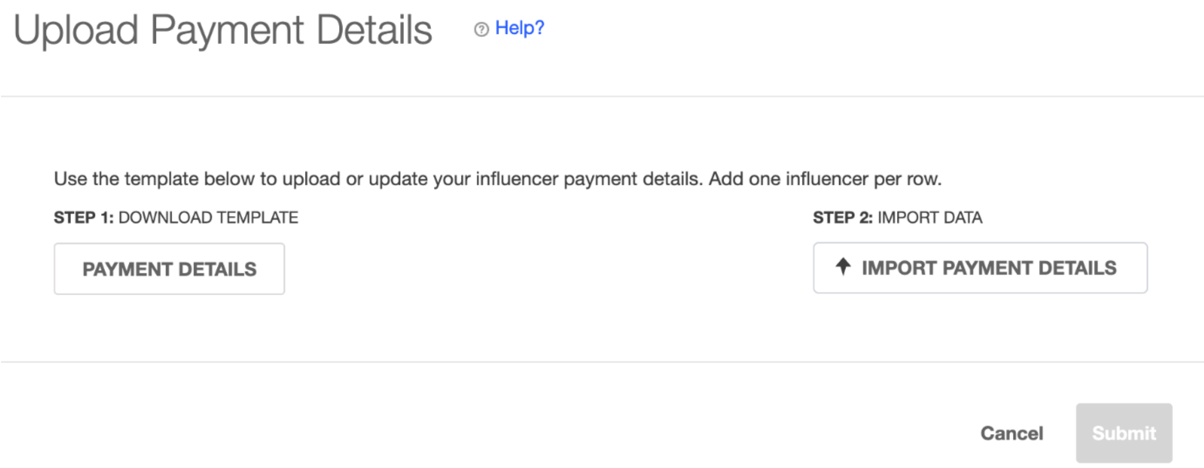
The onboarding CSV export includes all influencer social media accounts that exist in your database, including the ones you have yet to onboard and the accounts you've marked as Removed.

Bulk importing payment details for influencers

You can easily import payment details for your influencers in the onboarding process by clicking the **Upload Payment Details button** in the top-right corner of the Onboarding tab.



In the following window, you'll be able to download our Payment Details template and fill in your influencers' payment details in bulk to ensure the data is correctly imported into Influence.



Tips for using the Payment Details template:

- The influencers' payment details should be imported after the social accounts and general influencer information.
- All of your influencers' IDs will be listed in the Payment Details template, so be sure to match the influencer's payment information to their corresponding ID.
- If offering multiple payment methods, make sure to fill in the relevant payment details for the influencer's selected payment method. If Wire Transfer is one of your methods, you'll see that there are a lot of columns in the template related to bank transfers, but you only have to provide the bank details that are required for transfers in the influencer's country.