COMMUNITY PARTNER WEBSITE GUIDEBOOK
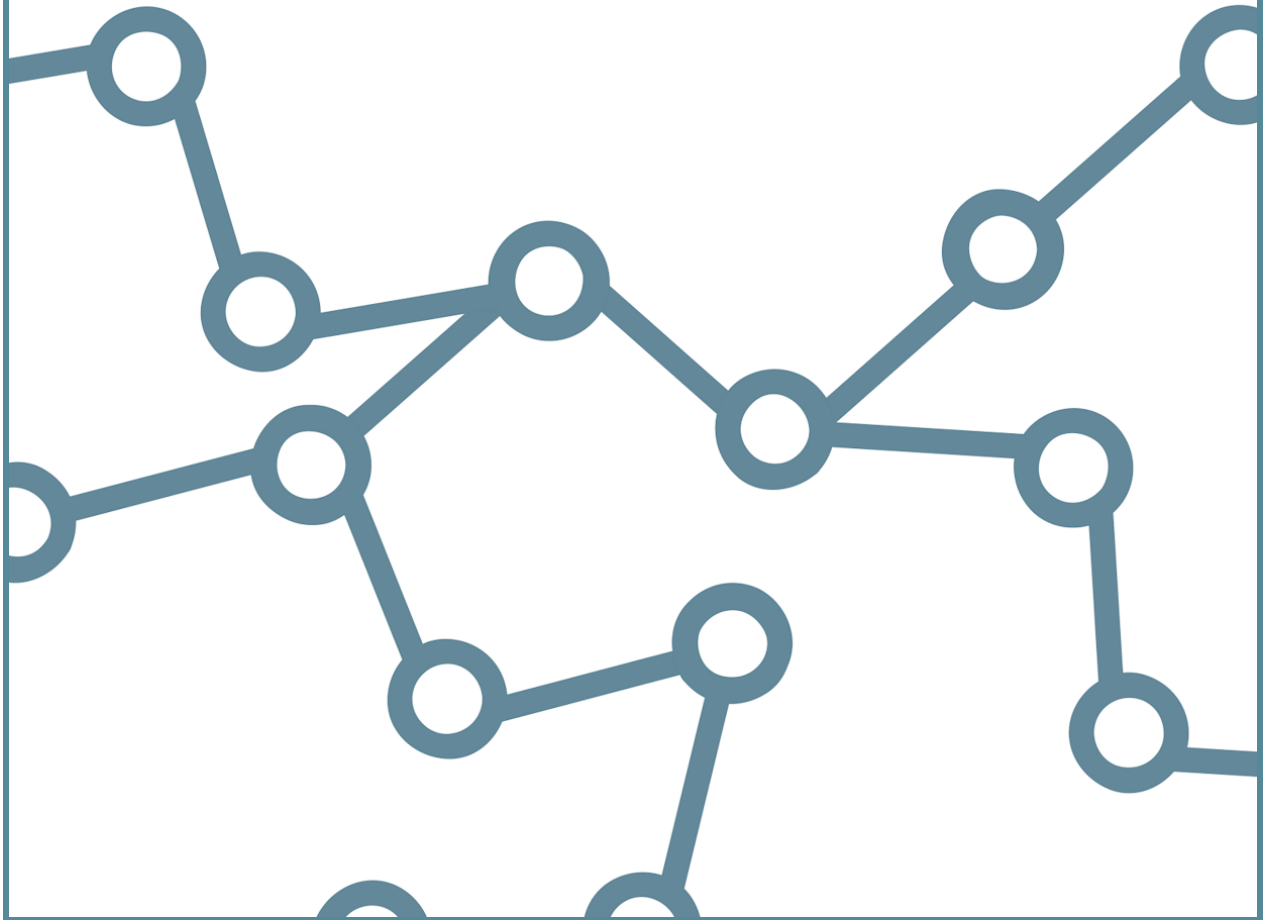
Table of contents

Introduction to the guide

This guide was created for the use of SuccessionMatching's Community Partners and their teams who have sponsored coupon codes and require in-depth knowledge of the site's functionality.

Important notice: This Guidebook must not be saved, copied, or printed. You must always access the document as a Google Document at this link.

This document is a live version of the Guidebook and will be continuously updated as SuccessionMatching's website and programming continues to evolve and develop. Printing or saving the document to use at your organization may result in your team using outdated information.

Please email hello@successionmatching.com if you have any questions or would like further information added to the document.

Introduction to SuccessionMatching.com

What is SuccessionMatching.com?

SuccessionMatching.com is an online community of business buyers, sellers, and succession planning professionals.

It has been described as a dating site but for compatible business buyers and sellers to find each other. While SuccessionMatching.com does have an algorithmic buying/selling matching feature, we do much more than that.

Our mission is to ensure farms and businesses in communities across North America continue to operate for generations to come. We do this not only by helping buyers and sellers find each other, but also by providing the assistance required for successful ownership transitions that benefit all parties involved.

SuccessionMatching's network and tools are perfectly suited to bridge the gap between business owners looking to transition and entrepreneurs interested in buying a business. We assist our members throughout the succession planning and business transition process, before and after the transitioning owners have met, and we guide them to appropriate succession planning professionals whose services can benefit them.

How does SuccessionMatching.com work?

SuccessionMatching.com provides access to tools, resources, and a network to assist individuals throughout their succession plan, business purchase, and ownership transition.

The first step to accessing these is creating a free Account. Once you've created a free Account, you can then create a user profile as a Buyer, Seller, or Succession Planning Professional. Don't worry - creating a user profile is also free, changeable, and you can create more than one.

The type of user profile you create will open up more features of the site. For example, Buyers and Sellers can create listings, and Succession Planning Professionals can apply to upgrade their profiles to become Preferred Partners.

Each profile type is listed below with an explanation of the user experience it provides. For step-by-step instructions of the sign up process for each, go to the Step-By-Step Instructions section of this document.

Privacy Settings

The information you provide to create your free Account is set to private by default. Different profile types may require additional information for some of their features. Once this information has been added, it can be edited at any time. Default privacy settings for this information may vary. Details on how to adjust privacy settings for each profile type are listed in the [Step-By-Step Instructions](#) section of this document.

Members can choose between four levels of privacy for each section of information on their profile.
1. Public: section will be visible to everyone with no privacy restrictions.
2. Members: section will be visible to all members of SuccessionMatching.com.
   a. Please note that listing information set to "Members" is only visible to members who have also created a listing. Only listing information set to "Public" is visible to all members of SuccessionMatching.com, even those who have not created a listing.
3. Connections: section will only be visible to members of SuccessionMatching.com who have accepted each other's connection request.
4. Private: section is only visible to the owner of the account.

To protect user privacy, some sections have restricted privacy settings and cannot be changed. It is possible to select "Private" for all sections, but it is not possible to select "Public" for all sections. These restrictions will vary depending on the profile type.

What are Accounts and Profiles?

Accounts

All users (buyers, sellers, succession planning professionals, and preferred partners) first join the site by creating a free account to become a member. All members can browse the site, access free resources, and book a free 30 minute consultation.

Once a user has successfully created their free account by verifying their email address, they will begin to customize their user experience by identifying themselves as a business buyer, seller, or succession planning professional. Each of these is a "profile," and each profile gives the member access to different features of the site.

Members can create multiple profiles under the same member account. This means one member can have a buyer profile, seller profile, and succession planning professional profile all under the same account, and all for free. They can change from one profile to the next without logging out of their member account.

Buyer and Seller Profiles

Members who create a Buyer and/or Seller profile will have the option to create a listing. Members must either pay a fee or input a coupon code obtained through special programming to use this feature. Listings allow Buyers/Sellers to access the full suite of SuccessionMatching tools, resources, and network.

To create a listing, Buyers/Sellers fill out a short questionnaire that describes the business they want to sell or buy. They can also add optional information on their profile to improve the quality of their listing.

The information they provide will be used to match them with other compatible members, curate helpful resources, and recommend Preferred Partners whose services may be relevant to them. The privacy settings on this information can be adjusted at any time.

Buyers/Sellers who have created a listing can access resources not available to other members, search for compatible members with our matching system, browse listings manually, and send connection requests.

Succession Planning Professional (SPP) Profiles

Members whose services can help Buyers/Sellers during a business transition can create SPP pprofiles. This includes, but is not limited to, professionals such as:
- Accountants
- Lawyers
- Economic Development Officers
- Commercial Lenders

SPPs can respond to connection requests, invite clients, have limited access to resources, and apply to become a Preferred Partner. SPPs are able to support their clients directly on SuccessionMatching.com by securely sharing documents, messaging, and recommending resources.

For privacy reasons, please note that SPPs cannot browse listings, solicit business from or advertise to other members.

Preferred Partner Profiles

SPPs can apply to upgrade their SPP profiles to Preferred Partner profiles.

In addition to all SPP features, Preferred Partners also enjoy prominent promotion on the site, the ability to upload videos and articles for all SuccessionMatching members, and are recommended to members who are actively searching for the assistance they provide.

Buyers/Sellers in the same region as Preferred Partners will see their information when looking for professional help, whether they are current clients or not. Preferred Partners also have the ability to reach out to new clients and grow their reputation beyond their region by sharing articles and videos on SuccessionMatching.com.

In order to become a Preferred Partner, SPPs must go through an application process that requires the applicant to provide additional information.

What are Coupon Codes?

Some features of SuccessionMatching.com, such as creating a listing, require payment. Thanks to the help of our Community Partners, many farm and business owners and buyers across Canada can access these features for free, or for a reduced price, by obtaining a coupon code from a Community Partner in their region.

Some restrictions do apply, so those interested should contact hello@successionmatching.com or a Community Partner in their region to get more information and find out if they are eligible. Locate the Community Partner nearest you by using our updated map of all current Community Partners at http://www.successionplancanada.com/community-partners.html

For each feature of SuccessionMatching.com that requires payment, the member will be prompted to enter a coupon code, if they have obtained one, along with their payment information. A valid credit card must be entered in order to complete the transaction, but they will only be charged the amount required by their coupon code. If the coupon code grants free access, a valid credit card must still be entered even though it will not be charged.

What is the SMCP Webinar Summit?

The SuccessionMatching Community Project (SMCP) Webinar Summit is an annual series of 10-15, online presentations that focus on essential business transition topics. Each webinar is about 30 mins in length and can be accessed privately from one's own home or office. Registered participants are sent 2-3 webinars to view for each day that the summit occurs, and the recordings are available for viewing afterward for a set period of time. In 2020, we are hosting a number of webinar summits with various partners, catering the materials to the specific needs of their audiences.

Step-By-Step Instructions

Create a Free Account

1. Go to http://www.successionmatching.com
2. Click the "Signup" button at the top right hand of the page, or at the bottom center right.
3. Fill out the information under "Create New Account" and click "Next."
   a. This information is used to create your "Account." Make sure you enter your email address correctly.
4. Go to your email inbox.
5. Find the message from SuccessionMatching.
   a. You may have to look in your Junk folder.
   b. If you do not receive an email within 5 minutes, click "Resend Email."
6. Click the "Confirm Now" button in the email.

You have now successfully created your free account. With your account, you can now create free buyer/seller/succession planning professional profiles.

Login to Your Account

1. Go to http://www.successionmatching.com
2. Click the "Login" button at the top right hand of the page, or at the bottom center left.
3. Enter your email and password and click "Login."

Create a Buyer Profile

Please note: You must have a SuccessionMatching account before creating a user profile.

1. Go to http://www.successionmatching.com
   a. You may be automatically prompted to "Select Your Profile Type." If so, proceed to step three. If not, then proceed to step two.
2. Login to your account.
3. Choose "Buyer" under "Select Your Profile Type" and click "Next."
4. Click on each statement that applies to you and click "Next."
5. Find or type in the name of the industry, or industries, you would be interested to buy a business in, and click "Next."

6. Type in the name of the city, province, or country where you would like to buy a business, and click "Finish."

You have now successfully created a Buyer Profile. From your Buyer Dashboard, you can now browse the site, access free resources, book a free 30 minute consultation, and create a listing.

Adjust Privacy Settings (Buyer)

1. Login to your SuccessionMatching account.
2. Click on your name in the top right hand side.
3. Select "My Profile" from the dropdown menu.
4. Click on "Privacy" in the top right quadrant.
5. For each section of information, choose whether you want to set privacy as: Public, Members, Connections, or Private.
6. When finished, click "Save."

You have successfully adjusted your privacy settings. You can edit them again at any time.

Create a Buyer Listing

Please note: creating a listing is an optional paid service. Listings are for Buyers who want to access the full suite of SuccessionMatching tools, resources, and network.

1. Login to your SuccessionMatching account.
2. View your Buyer Profile Dashboard.
3. Click the "Create a Listing" button on the upper right hand side.
4. Type in the title of your listing under "Name your listing" and click "Next."
5. Rearrange the options under "Rank the following business options from 1-6" so that your most preferred is in the #1 position at the top and your least preferred is in the #6 position at the bottom and click "Next."
6. Choose your preference under "What price range of business or farm are you interested in?" and click "Finish."
7. Enter your payment information and click "Pay Now."
    a. Please note: if you have a coupon code, you must still enter valid credit card information to process the coupon code. Your credit card will not be charged and your credit card information will not be stored.
    b. You may choose "Pay Later" and the information you entered will be saved. You can complete your listing by clicking on "Pay Now" from your Buyer Dashboard at any time.

You have successfully created a Buyer Listing. The information you provided will be used to match you with compatible Sellers, curate helpful resources for you, and recommend

succession planning professionals whose services may be relevant to you. You can adjust the privacy settings of this information at any time.

Create a Seller Profile

Please note: You must have a SuccessionMatching Account before creating a user profile.

1. Go to http://www.successionmatching.com
    a. You may be automatically prompted to "Select Your Profile Type." If so, proceed to step three. If not, then proceed to step two.
2. Login to your account.
3. Choose "Seller" under "Select Your Profile Type" and click "Next."

You have now successfully created a Seller Profile. From your Seller Dashboard, you can now browse the site, access free resources, book a free 30 minute consultation, and create a listing.

Create a Seller Listing

Please note: creating a listing is an optional paid service. Listings are for Sellers who want to access the full suite of SuccessionMatching tools, resources, and network.

1. Login to your SuccessionMatching account.
2. View your Seller Profile Dashboard.
3. Click the "Create a Listing" button on the upper right hand side.
4. Type in the title of your listing under "Name your listing" and select whether you are the "Owner" or an "Agent" and click "Next."
5. Enter the name and location of your business and click "Next."
6. Find or type in the name of your business's industry, or industries, and click "Next."
7. Rearrange the options under "Rank the following business options from 1-6" so that your most preferred is in the #1 position at the top and your least preferred is in the #6 position at the bottom and click "Next."
8. Tell us if and how you know the value of your business, and click "Next."
9. Choose the option that best describes your willingness to mentor and click "Next."
10. Choose if you would sell to an international buyer and click "Next."
11. Choose how open you are to investing in your business and click "Next."
12. Select whether your business is a franchise or not and click "Finish."
13. Enter your payment information and click "Pay Now."
    a. Please note: if you have a coupon code, you must still enter valid credit card information to process the coupon code. Your credit card will not be charged and your credit card information will not be stored.

b. You may choose "Pay Later" and the information you entered will be saved. You can complete your listing by clicking on "Pay Now" from your Seller Dashboard at any time.

You have successfully created a Seller Listing. The information you provided will be used to match you with compatible Buyers, curate helpful resources for you, and recommend succession planning professionals whose services may be relevant to you. You can adjust the privacy settings of this information at any time.

Adjust Privacy Settings (Seller)

Please note: you must have created a Seller Listing before you can edit privacy settings.

1. Login to your SuccessionMatching account.
2. View your Seller Profile Dashboard.
3. Click on "My Seller Listings" on the left hand menu.
4. Find the listing you want and click "Edit."
5. For each section of information, choose whether you want to set privacy as: Public, Members, Connections, or Private.
6. When finished, click "Save."

You have successfully adjusted your privacy settings. You can edit them again at any time.

Create a Succession Planning Professional Profile

Please note: You must have a SuccessionMatching Account before creating a user profile.

1. Go to http://www.successionmatching.com
   a. You may be automatically prompted to "Select Your Profile Type." If so, proceed to step three. If not, then proceed to step two.
2. Login to your account.
3. Choose "Succession Planning Professional" under "Select Your Profile Type" and click "Next."

You have now successfully created a Succession Planning Professional Profile. From your SPP Dashboard, you can now browse the site, access free resources, book a free 30 minute consultation, accept connection requests, complete your profile, and apply to become a Preferred Partner.

Complete Your Succession Planning Professional Profile

Please note: You must have created a Succession Planning Professional profile before completing it.

1. Login to your SuccessionMatching account.
2. View your Succession Planning Professional Profile Dashboard.
3. Click on "Complete Profile" on the upper right hand side.
4. Enter your business name, professional biography, and language(s) of service provision, and click "Next."
5. Select your fee structure, if applicable, and click "Next."
6. Choose the category(ies) your professional services fall under and click "Next."
7. Type in the name of the city, province, or country where you operate, and click "Finish."

Upgrade to a Preferred Partner Profile

Please note: You must have completed your Succession Planning Professional Profile before applying to upgrade to a Preferred Partner.

1. Login to your SuccessionMatching account.
2. View your Succession Planning Professional Profile Dashboard.
3. Click on "Preferred Partners" on the lower left hand side.
4. Click on "Become a Preferred Partner" in the upper right hand side.
5. A member of the SuccessionMatching Team will review your profile and contact you within 24 hours with next steps for the application process.

Once the application has been completed and successfully verified by SuccessionMatching staff, your SPP profile will be upgraded to a Preferred Partner profile. As a Preferred Partner, you can now enjoy prominent promotion on the site, the ability to upload videos and articles for all SuccessionMatching members, and you will be recommended to members who are actively searching for your services.

Register for an SMCP Webinar Summit 2020

Please note that each summit is unique to the area in which it is being delivered. In some instances, there is a form that must be completed first. If you are uncertain about what is being offered in your area and when, or you think a Webinar Summit would beneficial to your region and there is not one already scheduled, contact Chelsea at chelsea@successionmatching.com

Frequently Asked Questions (FAQ)

Will I have to pay out of pocket if I am not in a sponsored region?

Individuals outside of a sponsored region are treated on a case-by-case basis. Contact hello@successionmatching.com and a member of our staff will assist you.

Do I need a coupon code before I create an account on SuccessionMatching?

No. Creating a SuccessionMatching account and a Buyer, Seller, or Succession Planning Professional profile is completely free. Coupon codes are only required for specific features of the site. Users who attempt to access these features will be prompted with payment options, including entering a coupon code, paying with a credit card, or pausing the transaction to pay later.

What is the difference between an account and a listing?

Your SuccessionMatching account is the free membership you create on the site. It consists of your name, email, location, and password. With this account, you can create free Buyer, Seller, and Succession Planning professional profiles depending on what you want to use the site for.

Listings are what you create and share to find compatible Buyers or Sellers. Creating a Listing is a feature of the site for Buyers and Sellers only. You must have a SuccessionMatching account and a Buyer or Seller profile in order to create a Listing. When you create a Listing, you will take a short questionnaire that will provide the basic information to match you with a compatible Buyer/Seller. Creating a Listing requires you to pay or use a coupon code. After creating a listing, you will be able to access resources not available to other members, search for compatible members with our matching system, browse listings manually, and send connection requests.

How can I add information about the business I am selling?

You will create a listing for your business. To do this, you must first create a SuccessionMatching account and a Seller Profile. Once you have a Seller Profile, you can create a listing. When you create a listing, you will take a short questionnaire that will provide the basic information to match you with compatible Buyers.

How can I add more information than the questionnaire asked about the business I am selling?

After creating the listing, click on "My Seller Listings" from the left hand menu, find the name of your listing, and then click "Edit." You will then be able to add information about the owner, details about the business, add photos, manage privacy settings and more.

How do I set privacy settings for the business I am selling?

You can manage privacy controls for each business you list for sale on SuccessionMatching.com.

First, you must have created a listing on a Seller profile. Once a listing has been created, click on "My Seller Listings" from the left hand menu. Find the name of the listing, and then click "Edit." You will then see a number of options to add information about the business, and on the far right you will see "Privacy." Click on "Privacy" and you can choose 1 of 4 settings (Public, Members, Connections, or Private) for each field of information about your business. Click "Save" at the bottom to complete your changes. You can edit these settings again at any time.

How can SuccessionMatching.com help me with my Succession Plan?

As a Seller or Buyer, SuccessionMatching.com is great way to get access to the information and professionals you need to start, carry out, or complete your succession plan. Check out our videos and articles for all kinds of succession planning information. Request a free 30 minute consultation to speak with SuccessionMatching staff and get advice on next steps. Create a listing to find a 3rd-party Buyer or Seller, and complete all available information fields to find the best matches and curated resources. The site will also suggest matches with Preferred Partners, trusted professionals, whose services may be of use to you based on the information provided in your profile. SuccessionMatching staff will also periodically review your profile and make suggestions for resources, connections, and other opportunities for you to progress in your succession plan.

Do I need a coupon code to access an existing Webinar Summit?

No. To get access to the Webinar Summit, users have 3 options:
1. Have an active Buyer or Seller listing on SuccessionMatching.com.
2. Have an active Preferred Partner profile (upgraded from Succession Planning Professional).
3. Register for the SMCP Webinar Series as a new signup.
    a. Users can create an profile and submit their registration at no cost. Thanks to our Community Partners, the vast majority of our members receive the series for free through their sponsorship. For those who are not in a Community Partner Sponsored region, our automated system

will notify SuccessionMatching staff, and we will send the user options for completing registration including direct payment.

Can I still register for the Webinar Summit if I already have a SuccessionMatching account but haven't created a listing or upgraded to Preferred Partner?

Yes. Contact hello@successionmatching.com and a member of our staff will assist you.

Troubleshooting Tips

If you've experienced difficulties signing up for SuccessionMatching.com or the SMCP Webinar Series, please try the following to resolve the issue. If you are still unable to complete the sign-up process or access and use your profile as normal, please contact hello@successionmatching.com.

1) Restart your internet browser.
   - Exit all internet browser windows and open up a new window to try again.
2) Try using a different browser.
   - We recommend using Google Chrome, although SuccessionMatching.com is compatible with other major internet browsers such as Microsoft Edge and Mozilla Firefox.
3) Ensure your internet browser is up-to-date.
   - SuccessionMatching.com may not work properly if your internet browser is not running its most current version.
4) Reset your cookies.
   - Cookies save information between a user's computer and a website, and sometimes this can lead to errors in sign up processes. Access your internet browser's settings and reset your cookies, then start the sign up process from the beginning.
5) Clear your cache.
   - This will ensure you are interacting with the most updated version of the site. Access your internet browser's settings and clear your cache to view the most current version of the site.
6) Disable Ad-Blockers.
   - Some Ad-Blocking programs will interrupt interactions with SuccessionMatching.com. Temporarily turn off any ad-blocking software, or make SuccessionMatching.com exempt from ad-blocking software, to prevent this.
7) Adjust your firewall settings.
   - Some firewalls may block some functions of SuccessionMatching.com. Adjust your firewall settings to allow SuccessionMatching.com to function normally.
8) Try using a different computer.

- Some work and office computers have certain permission restrictions and firewall settings that prevent normal interactions with SuccessionMatching.com. Try using a computer where you have administrative control to adjust permission and firewall settings.
9) Restart and update your computer.
   - Turn your computer on and off, and download any necessary updates to your operating system. Then try using SuccessionMatching.com again.
10) Try using a mobile phone.
   - Your phone may not have the same issues as your computer. You can use SuccessionMatching.com from your phone as you can from a computer. You may have to troubleshoot your phone using the same steps as for your computer.

Still unable to complete the sign-up process or access and use your profile as normal? Please contact hello@successionmatching.com for assistance.