Your Ambassador Audit Checklist

Use this checklist to ensure every Ambassador, Future Ambassador, and Lead are categorized correctly in your CRM and on the appropriate touchpoint system. Use the checklist below to complete the audit process.

Client Name: _____

Circle the appropriate category: Ambassador Future Ambassador Lead/Inquiry

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If Ambassador, process 100% using the following checklist:

- ☐ Complete contact information for this person including:
  - ☐ First and Last Name Added to CRM (Include Significant Other)
  - ☐ Phone Number
  - ☐ Mailing Address (for monthly mailer)
  - ☐ Email Address
- ☐ Tag as Ambassador
- ☐ 1 Logged Call in the last 90 days
- ☐ 2 Personal Touches Scheduled
- ☐ Set up and receiving 12 Monthly Mailers
- ☐ Set up and receiving 12 Property Alerts
- ☐ Set up and receiving 12 Digital Market Reports in CRM
- ☐ Invite to attend your next event (in the next 90 days)

If Future Ambassador, process 100% using the following checklist:

- ☐ Complete as much contact information for this person as you can including:
  - ☐ First and Last Name
  - ☐ Phone Number
  - ☐ Email Address
- ☐ Tag as Future Ambassador
- ☐ 1 Logged Call in the last 90 days using the 10-25-90 strategy

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If Lead/Inquiry process 100% using the following checklist:

- ☐ Tag as Lead

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