

Ambassador Role and Process

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Introduction: An ambassador is someone who advocates on behalf of an organization to create goodwill and support. An ambassador should encourage donations, volunteering and agency and employer partnerships. It is a “role within a role”. Ambassadorship occurs at two levels: 1) assigned to a target group as a “relationship manager”, 2) assigned to an individual, e.g. a name received at point of entry event.

Framework: Choices must be made as to where to place the emphasis, for example.

	Donations	Volunteers	Candidates	Partners
Board	x			
Staff		x		x
Volunteers		x		
Candidates			x	

Recommendation: Implement ambassadorship broadly in phases: 1) target group pilot with a 3-4 staff as soon as possible, 2) expand to all Board members and full staff by ___ and 3) expand to select volunteers in ___.

The Premise:

- PR and Marketing are important prerequisites. If working, then our target group already knows about you.
- Direct “asking” is the primary way to recruit (Clients, Volunteers and Partners) and to receive donations. “Asking” works best at the person-level, not group-level. “Asking” is a skill, it can be learned and developed through training and practice. A defined process leads to continual improvement.
- Everyone’s role is to “ask” (all Staff and Board members and select Members and Volunteers).

Desired Ambassador Knowledge and Skills:

- Can develop a “relationship engagement” plan.
- Can “ask” including make ‘emotional hook” and link to others needs.
- Can discuss various volunteer and partner roles.
- Can present the “Organizational Experience”, e.g. a lunch & learn.

Ambassador Toolbox:

- Relationship engagement template.
- Marketing materials...brochure, story.
- Ask script (tbd).
- Organizational needs...volunteer positions, service needs, etc.
- Lunch & Learn kit (agenda, slides, talk sheet).

Further Discussion:

- Ingredients for success: 1) passion for the mission, 2) a standard process is used.
- “Cultivation” precedes “asking”.
- We need to use a single database for all “contacts” (not just donors) for ongoing communication and touches.
- People start as “Ambassadors-in-training”. They are acknowledged as Ambassadors when a quota is met. Consider a recognition “symbol” upon achievement of the quota.

The Process

	Process Details	Ind	Grp
General Awareness	Execute Awareness Plan which includes Annual Report, Newsletters, press releases, social media, etc.	✓	✓
Preparation	Everyone considers potential people to engage (no structure) Committee or Ambassador Process Owner assesses possible target groups Ambassadors are assigned to target groups Ambassadors prepare relationship engagement plan for target group	✓	✓ ✓ ✓
Targeted Awareness	Person-to-person invitations to the “Organizational Experience” People are categorized as Donors, Volunteers, Partners, Members Ambassadors are assigned to potential volunteers, members and partners.	✓ ✓	✓
The “Organizational Experience”	<u>Lunch & Learn @ or</u> <u>Modified Lunch & Learn @ Target Group</u> General ask How to help (units of service, \$, service) Let contacts know there will be follow-up	✓ ✓ ✓ ✓	✓ ✓ ✓ ✓
Personal Engagement/ “Ask” <i>(close the deal using the “ask”script)</i>	Setup time to meet. ___ is assigned to meet with significant donors. <u>Follow-up for feedback:</u> 1) Thank you for coming, 2) What did you think, 3) “Listen” (what are their interests, donate vs. volunteer? What motivates them?) Prepare list of questions. 4) Is there any way you can see yourself getting involved? 5) Anyone else you can think of to invite?	✓ ✓	✓ ✓
Ongoing Cultivation	<u>Start the cycle again:</u> Ongoing general awareness (see above) Ongoing target group relationship management	✓	✓ ✓
Reporting	Summary reports are generated and reviewed by target group.	✓	✓ ✓