

Ambassador & Advocacy Programs — Workbook

This workbook turns the course into the real artifacts of running an ambassador program. Each section mirrors one course module with hands-on exercises, fill-in worksheets, and checklists you apply to your own brand. Pick one product or service you actually sell and one primary outcome — reach and content, referral revenue, or retention — and carry both through every section. You will finish with a chosen program model and platform, a tier-and-reward structure, a scored list of real advocates pulled from your own data, a recruiting and vetting pipeline, a 30-day activation sequence, an FTC-compliant ambassador agreement, and a metrics dashboard that tells you exactly what is working and what to scale.

What Advocacy Is and Why It Works

Choose the right model and primary outcome for your brand, and ground the program in honest economics before you spend a dollar.

Worksheet: Choose Your Model and Primary Outcome

Lead with money or with meaning is the first design decision, and it flows from what you actually want. Fill this in for your brand so every later choice has a north star.

The product or service this program will promote

Primary model: customer-advocate ambassador / affiliate (commission) / influencer (paid reach) / blend (name the spine)

Primary outcome (pick ONE): reach and content / referral revenue / retention and loyalty

Why this outcome matters most to the business right now (one sentence)

Lead lever based on the outcome: access and status / product / referral money

One sentence purpose statement: The primary purpose of this program is to drive ____ by ____

Exercise: Make the Economic Case

Write down the assumptions that decide whether the program pays for itself, then compute a rough return. You will revisit these with real data later.

- Estimate your costs: platform/tooling, product gifted per member, rewards/prizes, and an honest number of community-management hours per quarter (at a cost per hour).
- Estimate activation: of the members you recruit, what percent will become active? Be conservative.
- Estimate output per active member per quarter: posts created AND customers referred, at your average order value.

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- Compute rough quarterly referral revenue and content volume, compare to total cost, and state whether it pays for itself on referral revenue ALONE.
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Checklist: Foundations Gut Check

- I have written one primary outcome (reach, revenue, or retention) and led with the matching lever.
- I budgeted community-manager HOURS, not just swag and software.
- I confirmed the product is genuinely liked — advocacy amplifies whatever the product already is.
- I know which model (ambassador / affiliate / influencer) is the spine of my program.
- I wrote down my assumed activation rate so I can check it against reality later.

Designing the Program: Tiers, Rewards, and Structure

Turn the idea into concrete tiers, a four-lever reward mix, the right tooling, and the rules and disclosure policy that keep it fair and legal.

Worksheet: Select Your Platform and Tooling

Decide between a lean manual setup and a dedicated platform based on what you are short on this year: budget, attribution, or engagement-at-scale.

What I most need: lowest cost / reliable referral attribution / challenges and gifting at scale / community home

Lean option I could start with (e.g. spreadsheet + Discord/Slack + unique discount codes + Google Form)

Dedicated platforms I will compare (e.g. Brandbassador, Roster, GRIN, Aspire, Mention Me, Talkable, Refersion)

Does it issue and track a UNIQUE code or link per member? (Y/N per option)

Does it collect and store member content so I have reuse rights? (Y/N per option)

My choice and the one-sentence reason

Exercise: Design Your Tiers and Reward Mix

Build a visible ladder with concrete, behaviour-based entry criteria, and pull all four reward levers — not just discounts. Lead with meaning for fan-driven programs.

- Name 3 tiers (e.g. Insider, Ambassador, Elite) and write the CONCRETE criteria to enter each (posts approved, referrals, or revenue thresholds tied to your outcome).

- For each tier, list rewards across all four levers: monetary, product, access, and status/recognition.

- Decide what leads: confirm access/product/status are the headline and money is a supporting accelerator (unless the program is explicitly transactional).

- Write the one-line pitch a prospective member sees: what they get + what is expected + why it is special.
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Worksheet: Write the Ambassador Agreement Terms

Draft the plain-language clauses that prevent silence and chaos. These become your official program terms — an invitation with house rules.

What members receive at each tier (perks, rewards, product, access)

What you ask of them (a light, achievable expectation — e.g. share/post N times per month, or stay a genuine active advocate)

Brand and content guidelines (tone, what to avoid, hashtags/handles to tag) and a content-rights/reuse clause

Disclosure requirement (members must clearly disclose the relationship on incentivized posts)

Conduct rules and termination (prohibited behaviour; how either side can end the relationship)

Checklist: FTC Disclosure & Compliance Readiness

- Members must clearly and conspicuously disclose the material connection on any incentivized post (free product, discount, or reward counts).
- I provide EXACT approved disclosure wording (e.g. #ad, #sponsored, or 'in partnership with') placed up front, not buried in hashtags.
- I forbid false or unsubstantiated claims, especially health, safety, financial, and performance results.
- I teach disclosure in onboarding and put the wording in the welcome kit.
- I monitor a sample of member content and follow up on missing disclosures — the brand can be liable.
- For non-US members I apply the strictest local standard (e.g. UK ASA/CMA, EU rules).

Finding, Recruiting, and Onboarding Advocates

Mine your own data for existing advocates, recruit warm-first, vet for genuine fit, and onboard with a 30-day activation sequence.

Worksheet: Score Your Existing Advocates

Your best ambassadors are already on your customer list. Pull the signals you already have into one place and score them, so your launch cohort is warm, not cold.

NPS Promoters (scored 9-10 on 'how likely to recommend') — source: Delighted/AskNicely/email survey

Repeat buyers (3+ orders or high lifetime value) — source: Shopify / e-commerce platform

Reviewers and UGC creators (5-star reviews, unprompted posts/tags) — source: reviews + social mentions

Highly engaged followers (consistent likes/comments/shares) — source: tagged posts / social inbox

Past referrers and community heroes (brought a friend, help other customers)

Scoring scheme to apply (e.g. NPS 9-10 = 3, 3+ orders = 2, posted UGC = 2, high engagement = 1, past referral = 1) and the top 20-50 names that result

Exercise: Write a Warm Recruiting Invitation

Recruiting your top advocates is a personal invitation, not a mass blast. Draft one message to a specific, real person from your scored list and pressure-test it.

- Open with a specific, true reference to them (their review, repeat orders, or a post they made) so it is clearly not a blast.

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- Frame it as a special invitation into something exclusive, and state plainly what they get and what is (lightly) expected.
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- Reduce friction: include the next step (application link or a simple yes) and offer to set up their code/link and assets.
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- Plan the second wave: when will you open a public application so other fans can apply, and what 4-5 qualifying questions will it ask?
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Checklist: Vetting Before You Approve

- They genuinely use and like the product (affinity), not just hunting for free stuff.
- Their audience matches my customer by interest and values, not just by size.
- Engagement looks real (comments and conversation), not bought followers or bots.
- Quick brand-safety scan of public content turned up nothing off-brand or conflicting.
- I prioritized trust and fit over follower count (a credible micro-advocate can beat a big disengaged account).
- I decided deliberately — approve / waitlist / decline — and did not auto-approve everyone.

Worksheet: Build Your Welcome Kit and 30-Day Sequence

Most programs die in the first month; onboarding is the fix. Design the kit and the day-by-day sequence so the majority post or refer before momentum fades.

Welcome kit contents (warm 'you were chosen' message, how-it-works summary, unique code/link, disclosure guidelines + exact wording, ready-to-use assets, ONE tiny first action)

Day 0 first action (e.g. share the welcome or post an unboxing) and community introduction

Day 3-5 check-in and gentle nudge plan

Day 7-10 plan to publicly celebrate and amplify their first post

Day 14 first challenge/mission and its small, clear reward

Day 21-30 first reward/recognition delivered + the visible path to the next tier

Running, Measuring, and Scaling the Program

Sustain engagement with a rhythm of challenges and recognition, measure the metrics that tell the truth, and scale on evidence.

Worksheet: Build Your Engagement Rhythm Calendar

A great launch followed by silence is how programs die. Put a predictable cadence on a calendar and treat it like a content schedule.

Monthly challenge/mission (the ask + the reward + how it's tracked)

Recognition cadence (leaderboard, member-of-the-month, featuring member content, personal thank-yous)

Exclusive value to offer members (early access, sneak peeks, ambassador-only drops, input into decisions)

Two-way touchpoint (ambassador newsletter, live Q&A, or behind-the-scenes) and how often

Give-to-ask balance: the non-ask 'giving' moments planned so you give more than you ask

Dormant re-engagement trigger (who counts as dormant, and the personal message/offer you'll send)

Exercise: Set Up Honest Referral Attribution

Decide how you will credit advocates for sales without fooling yourself, before you celebrate any numbers.

- Assign each member a unique discount code, a unique referral link, or both, and explain why (codes work offline; links capture the funnel).

- Write your attribution rule: a referral counts when ____, within a window of ____ days.

- Address incrementality: how will you tell a genuinely NEW customer from someone who would have bought anyway and just used a code?

- List the events that should reverse or void a credited referral (refunds, obvious self-use, fraud).

Checklist: Metrics That Tell the Truth (Not Vanity)

I report ACTIVE members and activation rate (acted within 30 days), not total enrolled.

I track reach AND engagement rate (quality), not just follower counts of my ambassadors.

If I use EMV, I state the assumptions and treat it as a directional proxy, not gospel.

I track referral revenue/conversions tied to unique codes and links as the hard-dollar outcome.

I track usable UGC created AND how much I reused in my own marketing.

I compare member retention/lifetime value against comparable non-members.

I compute a defensible program ROI (costs incl. management hours vs. referral revenue + reused-content value).

Exercise: Find What to Scale

Scaling is not adding bodies. Use your data to find the few things that demonstrably work and do far more of exactly those.

- Identify your top-performing members and the traits they share (affinity, niche, platform, audience type).

- Identify the recruiting source, the challenge, and the reward lever that produced the most activity and referrals.

- Decide one 'double down' action for each: recruit lookalikes, repeat the winning challenge, and invest in the best reward lever.

- Decide what to add as you grow (a leadership/regional ambassador layer, new tiers, or upgraded tooling) so the community stays personal and attribution stays intact.

Your Action Plan

1. Choose one product to promote and one primary outcome (reach, referral revenue, or retention), and write a one-sentence purpose statement that leads with the matching lever.

2. Make the economic case: estimate costs (including community-manager hours), an honest activation rate, and per-member output, and confirm the program pays for itself on referral revenue alone.

3. Pick tooling based on what you are short on (confirming a unique trackable code/link per member and content reuse rights), then design a three-tier ladder with concrete, behaviour-based

criteria and a reward mix across all four levers, leading with meaning.

4. Write a plain-language ambassador agreement covering perks, expectations, brand/content and reuse rights, disclosure, conduct, and termination.

5. Build an FTC-compliant disclosure policy with exact approved wording, taught in onboarding and monitored — applying the strictest local standard for non-US members.

6. Mine your own data (NPS Promoters, repeat buyers, reviewers, engaged followers, past referrers), score advocates, and assemble a warm launch cohort of 20-50.

7. Recruit warm-first with personal invitations, then open a short public application, and vet every applicant for affinity and fit over follower count.

8. Onboard with a welcome kit and a 30-day activation sequence engineered around getting the first post or referral, and start tracking activation rate immediately.

9. Run a calendared rhythm of challenges, recognition, exclusive value, and two-way communication, giving more than you ask and re-engaging dormant members.

10. Set up honest referral attribution (unique codes/links, clear rules, incrementality) and review a small set of truthful metrics — activation, reach, engagement, EMV, referral revenue, reused UGC, retention — on a regular cadence, then scale on evidence: recruit lookalikes of your best members, repeat the challenges and reward levers that worked, add a leadership layer as you grow, and protect quality and authenticity.

