

NEW MEMBER ADOPTION CHECKLIST

Company Information

Company Name	
Address	
Phone	
Point of Contact	
Ambassador	

Checklist

Notes

<input type="checkbox"/>	Send Welcome Email <input type="checkbox"/> Invite to events & next Member Orientation <input type="checkbox"/> Ask for a meeting	Orientations Dates:
<input type="checkbox"/>	Follow-up call prior to next Ambassador Meeting <input type="checkbox"/> Did they receive the welcome email? <input type="checkbox"/> Have they watched their Member Tutorials? <input type="checkbox"/> What are they going to, or want to attend?	Notes:
<input type="checkbox"/>	Have I seen my adoptee at an event (Check for Yes)	List event(s)
<input type="checkbox"/>	How many touch points have you had? <input type="checkbox"/> I've sent a welcome email <input type="checkbox"/> I've called them/left them a voicemail <input type="checkbox"/> I've had a meeting with them <input type="checkbox"/> HELP! They aren't responding	
<input type="checkbox"/>	How many employees are engaged with the Chamber?	Who are they? Note any emails to add to the newsletter subscriber list.
<input type="checkbox"/>	Has your adoptee been involved in other ways? <input type="checkbox"/> Expressed interest in Hosting or Sponsorship <input type="checkbox"/> Expressed interest in Joining a Committee or Board	Note how they've been involved & interests:
<input type="checkbox"/>	Do you have recommendations for the Chamber?	

Ambassador Signature _____

Date _____