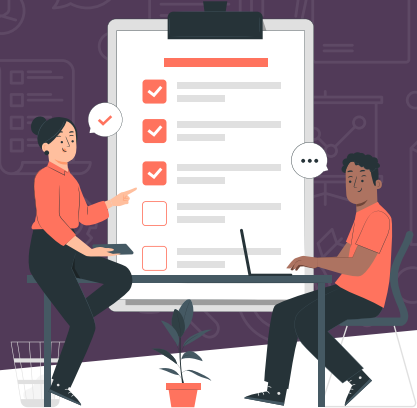


# How Smart Is Your AMS?

*Take the Checklist Challenge!*  
Evaluate What's Working, What's Not, and Where You Can Level Up



Is your association's software helping—or holding you back? Use this **interactive** checklist to assess how well your current tools support your goals.



## 1. Operations & Efficiency

**Is your team working harder than they need to?**

- ☐ Staff spend significant time on repetitive tasks like renewals, invoices, or event confirmations
- ☐ You're using multiple platforms that don't integrate well (e.g. Excel + Eventbrite + Mailchimp)
- ☐ Onboarding a new member takes several manual steps
- ☐ You often rely on spreadsheets to manage key operations

🚩 If you checked 3 or more, your current systems may be creating friction and limiting your team's capacity.



## 2. Member Engagement & Communication

**Are your members staying connected and feeling valued?**

- ☐ You're unsure which members are actively engaged vs. at risk of lapsing
- ☐ Communications are one-size-fits-all due to lack of segmentation
- ☐ It's difficult to provide personalized updates, reminders, or renewal nudges
- ☐ Members struggle to navigate your website or member portal
- ☐ You lack a mobile-friendly way for members to engage on the go

🚩 A smarter AMS gives you the tools to track, personalize, and improve member experiences.

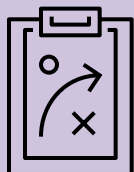


## 3. Revenue & Retention

**Are you maximizing your financial sustainability?**

- ☐ Renewals feel reactive, not automated or proactive
- ☐ You don't have a clear picture of who is (and isn't) likely to renew
- ☐ It's hard to track ROI on events, sponsorships, or advertising
- ☐ You're unsure how to grow non-dues revenue reliably
- ☐ Manual billing or payment tracking creates errors or delays

🚩 The right tools can improve cash flow, reduce churn, and help you scale without extra staff.



## 4. Strategic Insight & Reporting

**Do you have the insights you need to lead with confidence?**

- ☐ Your reports are created manually and are time-consuming to update
- ☐ You lack a dashboard showing KPIs like renewals, event ROI, or engagement trends
- ☐ Board or leadership updates require last-minute scrambling
- ☐ You don't have visibility into what's working—and what's not
- ☐ Data is siloed and hard to access without IT support

🚩 Data should empower your decisions, not delay them. A smarter AMS puts insight at your fingertips.

### Summary: How Did You Score?

**Your Score:**



#### 0–5 boxes checked

You're in good shape! Your systems seem to be working well. Consider exploring new tools only as your needs grow.



#### 6–10 boxes checked

There's room to improve. You're likely experiencing friction that's affecting staff productivity and member satisfaction.



#### 11+ boxes checked

Time for a change. Your current systems may be costing you time, revenue, and engagement. It's worth exploring smarter, purpose-built AMS options.

### Ready to Explore What's Possible?

Whether you're just starting to evaluate or need help diagnosing your biggest pain points, our team is here to help.

Chat with an AMS expert to get personalized guidance and explore solutions designed for associations and chambers like yours. No pressure. No jargon. Just smart answers.



**Chat with an AMS**