

You already know that your association or alliance needs professional support from an association management company (AMC). Maybe you've even established a selection committee, who will lead the vetting process. Now, before you start comparison shopping, use the following guide to organize your process—including the all-important first step of explaining who you are.

#### 1 Outline Who You Are

An AMC can't help you without understanding who you are. That's why it's so critical to provide guidance and outline the history of your organization to prospective AMCs. Here are a few areas you may want to cover:

- **Your Governance**—What is your organization's strategic direction? How does your Board operate? What have its members been up to lately?
- **Your Finances**—What is your overall financial position? (As you move forward with proposals, you'll need to illustrate the broad outline with recent statements, assets, taxes, and budgets.)
- **Your Employee Profile**—Who works for you, and under what terms?
- **Your Membership**—Who supports your mission? And what are you doing to attract and engage them?
- **Your Meetings and Events**—What's your plan for getting leaders, members, and stakeholders together? What's the scope of your annual meeting/conference?
- **Your Other Programs**—Do you oversee any programs for professional certification, accreditation, standard-setting, etc.?

In the process of drafting this outline, you'll be better equipped to assess your management needs. For example, would you be best served by full-service association management, a package of shared services, ongoing consulting, or do you need help with a finite project? Reviewing your membership trends, dues structures, conference goals, Board meeting minutes, and other defining documents will help identify your top priorities (if they weren't already apparent).

#### 2 Seek AMCs with Relevant Knowledge and Experience

Now that you know what you need, it's time to gather the names of some suitable AMCs. You can find comparative information about company history, client scope, client size, and expertise in the ASAE's annual [AMC Directory](#). This guide divides expertise into categories: certification, expositions, financial management and administration, government relations and lobbying, meetings and conventions, membership marketing, publications, public relations, and technology.

Before you reach out to any firms directly, you can refine your list even further just by scanning AMCs' websites. Look for success stories and case studies that illustrate how the AMC conquered challenges similar to the ones you are facing. Find these in the Resources or About section of a firm's website, along with client lists and testimonials.

Once you have a short list of candidates, ask if you can contact any references. Past and current clients will provide much more direct information than any candidate-authored RFP.

##### Experience-Related Questions to Ask AMC Candidates

When was your company founded?

What's the educational and professional background of your executive team?

Who will represent our account? Are they full-time team members or consultants?

Do you employ any experts in specific service areas (e.g. JDs, MBAs, CPAs, marketing, web development, or HR professionals)?

What are some of your best success stories?

### 3 Explore Skills and Reputation

Got a handful of association management companies in mind?

Now it's time to explore the full menu of services and solutions these different AMCs offer. Test your organization's weak points against your candidates' strengths. In other words, if you know you'll need the most help with financial controls or membership marketing, drill down into the AMCs' capacity to fill those specific holes. From a value-add perspective, it doesn't make sense to join forces with a group whose strategic focus is perfectly aligned with what you're already doing.

Meanwhile, there's a difference between simply claiming a list of skills and actually delivering effective work. Some groups will overstate their capabilities, or neglect to mention that certain services are outsourced. Conduct a bit of reputation research to see how others rate your candidates' skills and credibility.

Do the AMCs on your short list have a strong presence in the networks and communities you share with your members? Try Googling some names on their executive teams. Ask about their strategic relationships with banks, law firms, or employee hosting service providers, and follow up, where possible, to obtain the professionals' insights.

### 4 Insist on Accreditation

Just as you wouldn't send your kids to a college that hadn't earned the proper accreditation, you shouldn't partner with an AMC that hasn't invested in its own practice standards. Association management firms can earn voluntary accreditation through the AMC Institute. According to the Institute, accreditation means that an AMC will follow a documented set of best practices in these key areas:

- Client Contracts: Review Procedures and Requirements
- Servicing the Clients and Service Delivery Procedures
- Evaluation of Services
- Financial Management and Internal Controls
- Insurance Coverage
- Employee Recruitment and Selection
- Employee Training and Professional Development Procedures
- Subcontracting and Purchasing Requirements
- Record Keeping Requirements/Continuity of Operations
- Internal Audit Procedural Requirements

You can search for accredited AMCs by country or state via the [AMC Institute's search tool](#). AMCs must renew their AMCI accreditation every four years.

### 5 Consider Culture and Connect in Person

Sure, everyone puts his best foot forward during the vetting process. But there are ways to identify a bad fit and clashing styles even during evaluation stages. Plan in-person interviews with your top AMC candidates, or arrange to visit their headquarters.

Talk to as many people as possible within different association management companies. For example, how do the firm's own employees rate their jobs and their company overall? Are they more or less happy to be a part of the organization?

Imagine your team in a long-term working relationship with these people. Do you feel comfortable? Valued? Engaged? Heck, are you having any fun?

You don't have to sacrifice personable and easy-going for smart and sophisticated. When it comes to a harmonious working relationship, you should expect to get everything on your list. So if there's any doubt about the kind of culture you're marrying into, you may want to start the partnership with an ad-hoc management project.

### 6 Look for Flexibility and Collaborative Style

Be leery of any association/alliance management company that talks in absolutes. Best practices are one thing; cookie-cutter management schemes are another. To be sure your prospective partner can really roll with the punches and address your unique concerns, ask for specific examples of revised project plans.

#### Flexibility and Satisfactory Performance Questions

How long is your average client relationship?

When was the last time you disappointed a client? And how did you resolve the issue?

How does your team work with association staff members and/or volunteers?

What are some new/innovative approaches you've taken in recent months?

## 7 Evaluate Cost and Pricing

Did we say cost/pricing as a selection criterion doesn't matter? That may have been an overstatement. It's true: cost-based proposals can't speak to service quality, commitment, or integrity. And in many cases, they're based on a scope of work that has yet to be fully determined.

But pricing definitely has its place in the overall AMC decision. In addition to cost proposals, don't forget to ask about payment schedules, contract terms, even termination clauses. If you want true apples-to-apples numbers, draft a detailed list of sample projects or startup initiatives. Ask candidates to break down their reports as granularly as possible.

Implementing a rating matrix that allows you to score candidates in all the different categories will help bring cost comparisons into perspective.

If you're somewhere in the middle of the AMC selection process, we'd love to be included on your short list. At Virtual, Inc., we provide strategic consulting and management services to associations, standard-setting organizations, and technology consortia at all lifecycle stages—from start-up through growth phase and maturity.

To learn more, [contact our team](#). Ask about our [practice areas](#), our [solutions](#), and our proven track record of success.

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### Cost and Pricing Questions

What kind of pricing plan do you use? Why?

For flat fees, what does each line item in this proposal include?

Do you require an up-front retainer?

How long are your contract terms?

What factors do you typically include in your termination clauses?

## Virtual's Technology Team Leaders



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## Want to start your association off right?

Virtual, Inc. represents a seasoned team of association management professionals, with a long-time focus on technology and standards-setting consortia. Our clients are involved in the technologies and standards that touch every electronic transaction occurring in the world today. From strategic management services to tactical implementation, we are committed to helping groups like yours reach their full potential.