



ASSOCIATION OPERATIONS

The New AMS Internal Buy-In Kit

**You see the opportunity for a better way to work.
This kit helps the rest of your organization see it too.**

A practical toolkit for documenting recurring friction, estimating its impact, building internal support and deciding what comes next.

WHAT YOU'LL COMPLETE

01 Check readiness

02 Document friction

03 Estimate impact

04 Connect to outcomes

05 Start the conversation

06 Decide what comes next

A useful conversation starts with shared clarity.

The people closest to the work notice first

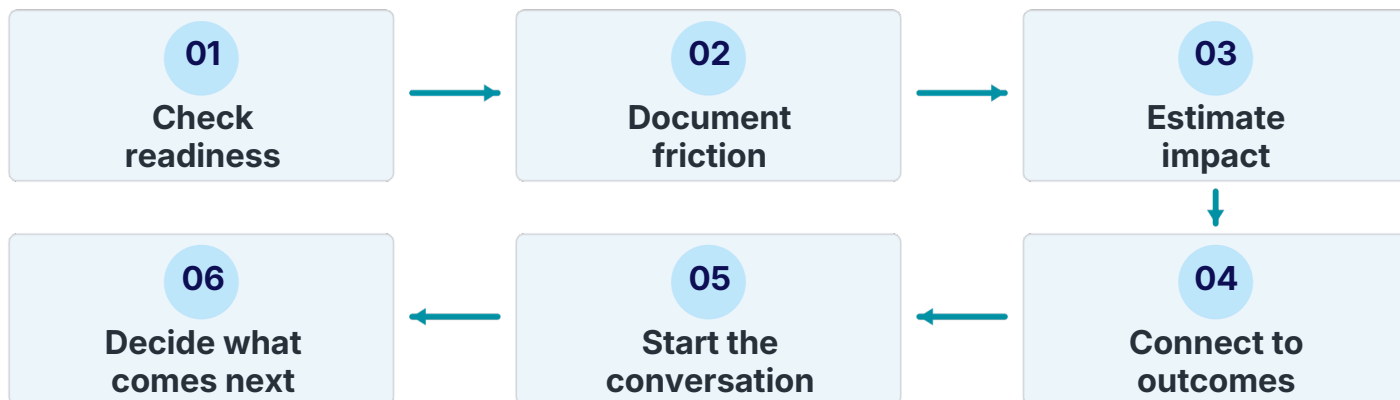
Systems rarely stop working all at once. More often, the association changes around them. The people doing the work are usually the first to see when extra steps, manual fixes or disconnected data begin to slow the team down.

This is not a case against the past

This is not about criticizing a past decision or blaming a vendor. It is about helping colleagues see the same recurring patterns and agree on what deserves attention.

The right next step could be process improvement, training, configuration, an integration or a new AMS. This kit helps your team make that decision with facts and shared outcomes.

What you will complete



A good way to use this kit

Complete it yourself first, then invite two or three colleagues to add examples. You do not need perfect data. A few recurring examples, a conservative estimate and agreement on the outcomes that matter are enough to begin.

Is it time to have the conversation?

Check the statements that happen often enough to affect the way your team works. This is not a scorecard for the system or the people using it. It is a way to spot patterns worth exploring.

CHECK FOR RECURRING PATTERNS

Staff effort

- | | |
|--|--|
| ☐ Staff enter or correct the same information in more than one place. | ☐ Important processes depend on spreadsheets, personal notes or memory. |
| ☐ Only one or two people know how to complete certain routine tasks. | ☐ People avoid the system because completing the work another way feels easier. |

CHECK FOR RECURRING PATTERNS

Data and decisions

- | | |
|---|---|
| ☐ Reports require exports, cleanup or manual reconciliation before they can be shared. | ☐ Different systems show different answers to the same question. |
| ☐ Leadership cannot get timely answers about membership, revenue or engagement. | ☐ Staff are not confident that the data is complete or current. |

If the same issue appears in more than one category, treat that repetition as useful evidence. Continue to the next page to look at the member and growth experience.

Look for the pattern, not a perfect score

Complete the final readiness category, then use the guidance below to interpret what you see. A few focused issues may call for a focused response. Repeated issues across teams deserve broader discovery.

CHECK FOR RECURRING PATTERNS

Members and growth

- | | |
|--|---|
| ☐ Members contact staff for help with tasks that should be simple to complete online. | ☐ Launching a new program, product or pricing model requires a workaround. |
| ☐ Routine changes require outside help, custom development or a support ticket. | ☐ Teams design processes around system limits instead of the experience they want to create. |

HOW TO USE YOUR RESULT

A few checked boxes may point to a focused process or training opportunity.

Repeated issues across teams suggest it is time for broader discovery. What matters is frequency, reach and whether the current platform can reasonably improve.

THE POINT

**Look for a
pattern, not
a perfect
score.**

Make the invisible work visible

Most system friction stays hidden because capable staff keep the work moving. For two to four weeks, capture what happens when a routine task takes extra steps. Use facts and specific examples.

FIELD NOTE

Notice the workaround.

Listen for these phrases

- We always have to export it first.
 - Only one person knows how to do that.
 - Do not use that report without checking it.
- We keep a separate spreadsheet for that.
 - The system cannot do it unless we customize it.

AMS friction snapshot

Task or process	Extra steps required	How often	Who or what is affected

Look for the pattern

Look for recurring work that crosses teams, affects members, delays decisions, creates risk or consumes time that should be spent elsewhere.

THE PATTERN WE ARE SEEING

Estimate the time and opportunity involved

You do not need a perfect business case to begin. A conservative estimate helps others understand the size of the opportunity and gives the organization a baseline for measuring improvement.

A SIMPLE STARTING POINT

Hours each month x hourly staff cost x 12 = estimated annual cost

Task or workaround	People involved	Hours each month	Estimated annual cost

Use one row for each recurring task or workaround. Choose a conservative estimate you can explain, then continue to the next page to capture impacts that hours alone cannot show.

The impact hours matter

Time is only one part of the opportunity. Check the effects that appear alongside the workarounds you documented. These consequences help colleagues understand why the issue matters beyond one team.

☐ Outside consulting, custom development or support costs

☐ Delayed renewals, registrations, invoices or other revenue activity

☐ Errors, duplicate records, refunds or time spent correcting data

☐ Member frustration or staff follow-up caused by a difficult digital experience

☐ Programs, pricing ideas or services the association cannot easily launch

☐ Continuity risk when essential knowledge lives with one person

CONSERVATIVE ESTIMATE

Annual impact

Use a number you can explain.

The purpose is to size the opportunity, not to prove an exact return before discovery begins.

YOUR ESTIMATE

Connect the work to shared outcomes

The most productive AMS conversations are not about defending or criticizing a platform. They connect recurring work to the outcomes the association and its members need.

Current friction → **Organizational consequence** → **Better outcome**

What is happening now	Why it matters	What better could look like
Renewal status is reconciled manually.	Revenue reporting is delayed and errors are harder to catch.	Staff and leaders can see accurate renewal status when they need it.
Members contact staff to finish basic online tasks.	Service time increases and the experience can weaken trust.	Members can complete common tasks clearly and confidently.
Reports require several exports.	Teams spend time assembling answers instead of using them.	Reliable information is available for decisions and board reporting.
New programs need one-off workarounds.	Growth creates more administrative burden.	The association can add offerings without rebuilding the process each time.

What makes an outcome useful?

- It describes a result, not a product feature.
- It matters beyond one department.
- It can be observed or measured later.

Build the sentence leadership can respond to

Use the prompts below to translate day-to-day friction into a concise opportunity statement. Keep it specific, neutral and focused on what the organization needs next.

01 CURRENT APPROACH TO

02 REQUIRES

03 WHICH AFFECTS

04 WE WANT A BETTER WAY TO

05 SO OUR ASSOCIATION CAN

Example

Our current renewal process requires membership and finance staff to reconcile three exports every month, which delays reporting and creates avoidable errors. We want a better way to maintain a reliable view of member and payment status so staff can spend less time checking data and leadership can make decisions with confidence.

Bring people into the conversation

The first conversation does not need to end with approval for a new system. It should create a shared view of the current situation and agreement on what the organization should explore.

A constructive way to open

Our current system has supported the association, but our needs and processes have evolved. I have documented several recurring points where staff are doing extra work or members are experiencing friction. I would like us to review the examples, agree on what improvement would look like and determine whether the answer is process, configuration, integration or platform change.

A 30-minute meeting agenda

- 01 Share two or three examples that show a recurring pattern.
- 02 Review the people, time, cost and member impact involved.
- 03 Ask each team what it sees from its part of the organization.
- 04 Agree on the outcomes that matter most.
- 05 Choose the next step and name an owner for it.

MEETING DETAILS

DATE

OWNER

DESIRED NEXT STEPS

Invite the right perspectives

A useful conversation includes the people who see the work from different angles. Invite enough perspectives to reveal the pattern, while keeping the group small enough to make a clear decision about what to explore next.



Executive sponsor: connects the work to strategy and budget



Workflow owners: membership, events, education or certification



Finance: payments, reconciliation and reporting



Technology or operations: integrations, data and risk



Front-line staff: member questions and daily system use

KEEP THE DISCUSSION FOCUSED

Avoid a feature wish list or a review of everything that has ever gone wrong. Focus on recurring patterns, shared outcomes and what the association needs next.

Create a 30-day path to clarity

A short discovery period can help your organization decide whether it needs better use of the current system, targeted improvements or a new platform.

Your 30-day path

01

Track recurring friction across the teams that use the system most.

02

Group examples by workflow: renewals, events, reporting and payments.

03

Estimate time, cost and member impact using conservative assumptions.

04

Agree on the three to five outcomes that matter most.

05

Assess whether the current platform can deliver the agreed outcomes.

06

Document the decision and name an owner for the next phase.

Ready to talk with potential partners?

- | | |
|--|--|
| ☐ We agree on the problems worth solving. | ☐ We can describe the outcomes we need. |
| ☐ We understand key workflows, data and integrations. | ☐ We have a decision owner, process and investment range. |
| ☐ We know how we will measure improvement. | |

BRING US THE MESSY VERSION

You do not need a perfect requirements document before asking for help.

Start a conversation at hello@opalitecloud.com