





# How an AMC Streamlined its Operations by Adopting One Member Management Software

## At a glance

<b>Organization name</b> Total Excellence Association Management (TEAM)		<b>Type</b> Association Management Company	<b>Solution(s) used</b> Atlas AMS
<b>Industry</b>  <b>Medical</b>	<b>Staff Size</b>  <b>30</b>	<b>Member Count</b>  <b>12,000</b>	<b>Annual Revenue</b>  <b>\$1.8M</b>
<b>Challenge</b> TEAM had 30 clients, many using different database solutions. They sought a way to make things easier for staff and more beneficial to clients.		<b>Solution</b> Through making Atlas its required database for any client, TEAM streamlined tasks, increased staff efficiency, and lowered overall management costs for TEAM clients.	



**For an association management company (AMC), staff efficiency is something that certainly has theoretical value. In reality, however, the stakes are raised as efficiency and alignment can make or break an AMC's ability to attract new clients.**

No one understands this more than Lauren Martini, operations manager for Total Excellence of Association Management (TEAM) in Harrisburg, Pa. Today, TEAM's 30 staff members manage 26 clients, including two large speciality societies and a handful of small county societies, mostly in the health and medical fields.

"We needed to consolidate all clients with one database versus each client using different databases," said Martini. "This was incredibly important to TEAM not only for efficiency, but for security purposes as well. For instance, if the database was charging per user and the client only allowed for one or two users it would force us to share login information among staff. This doesn't follow our best practices for IT security."

### **Unique Situations Require Unique Solutions**

TEAM is a unique AMC. It was actually founded by Pennsylvania Medical Society (PAMED), which aimed to foster the advancement of medical knowledge, relieve suffering, and promote the health of the community. Eventually, the Pennsylvania Psychiatric Society came to PAMED asking them to take over management of its day-to-day. This model grew year after year until 10 years ago, when PAMED created TEAM to be the official AMC to manage this growing segment of business.



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“Each TEAM client benefits from the expertise of a dedicated staff team comprised of an executive director, meeting manager, deputy executive and member service specialist, and an in-house marketing and communications team,” Martini said. “They have coverage on all levels and have cross-coverage on all the teams in case of extended absence.”

The above is what makes contracting with an AMC attractive, especially when in-house association management structures aren’t sustainable. However, Martini said one drawback of many AMCs is confusing cost structures, which can cause frustration and mistrust for associations with tight budgets.

“We had been getting comments that AMCs nickel and dime them with the management fee and all the technology pass-throughs in their expenses,” she said, explaining that TEAM aimed to change that impression.

By offering an all-inclusive, flat-fee pricing structure, TEAM was able to create a strong value proposition that differentiated them from the market. When TEAM came to MemberClicks in 2015, they were excited that the Atlas product could consolidate their clients into one software solution. Now, using Atlas is a requirement for any new client.

“We do have experience with the Oasis AMS and would be willing to take on a client already using Oasis and continue managing them through it,” Martini said. “But we do limit the AMS platforms we’re willing to use to Atlas and Oasis.”

## **The Benefit(s) of Managing Multiple Clients on One Software System**

Martini said when a client signs on with TEAM, they agree to use all of TEAM’s technology. And there’s good reason for this.

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The Atlas database functionality alone has been beneficial to TEAM's staff, but by expanding services to include full website management through MemberClicks, they are able to market each client appropriately and provide a smooth, intuitive member experience for those trying to do business with their association online.

Martini said that staff has gained efficiency and saved hours of time being able to move quickly through tasks such as pulling member lists, assessing invoice logs, and updating profile information by using one, familiar tool.

“It's also great to be able to pull reporting quickly and track who is on what committee,” she said.

## **Passing Success Right on Through**

Instead of passing arbitrary costs through to clients, TEAM is able to actually save clients money, which is always an attractive benefit to an association looking to avoid wasted revenue.

What TEAM does pass through to its clients are results. For example, TEAM handled management of a meeting for American College of Veterinary Radiology (ACVR), which was so professionally and proficiently run, the association saw membership growth afterwards. This led ACVR to hire TEAM on a more full-time basis, switching to adoption of their full suite of services.

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That's a great problem to have, right?

The Pennsylvania Academy of Dermatology (PAD) also hired TEAM to fully run one of its meetings, which had an expectation of \$40,000 in revenue. Thanks to TEAM's hard work on the association's behalf, the meeting landed three new sponsors, which brought more attention to the event. PAD smashed its revenue goal, bringing in around \$120,000 thanks to more sponsor dollars and increased event registrations.

### **The Future is Brighter Than Bright**

After five years as a MemberClicks customer using Atlas for all of its clients, Martini knows the only place TEAM and its clients are going is up. Admittedly, growth was stalled by gaps in leadership and some operational hiccups, but after implementing some new processes and the flat-fee pricing structure, Martini said clients have shared that, "it is like day and night; we love all the changes you have made."

"Due to operational issues and previous poor leadership we haven't seen growth in our clientele numbers, but since I came on board and restructured our operational process we are anticipating growth," she said.

One big piece of the growth puzzle for TEAM is continuing its close relationship with MemberClicks customer support, which Martini cites as one of the best things about a partnership with the tech company.

"I would recommend MemberClicks to others because of the great customer service and MemberClicks' willingness to always help us when we need training, advice on how to pull information, and flexibility with adding and removing groups to the database," she said.

TEAM currently uses many tools within the Atlas legacy desktop client. But as

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many important features are being improved and moved from the desktop to browser-based software, Martini is excited about adopting new and better workflows.

“The new web version’s UX is great,” she said. “Without any training, I was able to go in and pull all necessary data needed. I was also able to train a new staff person on how to use the web version with ease.”

With so many possibilities around the bend, it’s an honor for MemberClicks to be along for the exciting ride. No question, **we’re on your team, TEAM!**

► Read more at [blog.memberclicks.com/case-studies](https://blog.memberclicks.com/case-studies)

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