Karl's Notes

Interview with Gloria Peterson from AM Group

(Advocacy Management Group)

Present

- Gloria Peterson, AM Group
- Amy B
- Chris B.
- Jeff G.
- Larry M.
- Karl P.
- Katherine V.
- Steve K.

Not Present

- Corey K.
- Heather J.

AMGroup (Advocacy & Management Group) has three people dedicated to social content creation and social media management.

Gloria was unsure how we might run a membership drive without phones. She is will to engage in a online-focused campaign.

She spent a long time describing their promotion strategy and methods. As some Taskforce members noted, this felt a bit like a canned presentation.

They are comfortable using Google Docs, Sharepoint, or whatever we want. She mentioned Slack a few times. I am personally not interested in moving any communication to Slack or other interruption-based systems.

Re: Committees

- They will assign a staff member to help us manage committees and related communications

- She believe committee chairs should present their reports and proposals to the board rather than a representative or liaison. They will work with the committee chairs to prepare them for these meetings.

In passing, she mentioned that we would have a team assigned to our organization, so we will not be passed around their 50-ish employees.

She mentioned that we need a strategic plan and helping us develop this would be included in the price as quoted.

AMGroup works with pretty much any AMS (association management software) that we choose. She did not seem to know the details of various packages, such as security. But she said they are willing to work with Growth Zone, Member Clicks, or others.

Overall, she did not seem to have an opinion on tools or which they might recommend. With regard to collaboration and documents, she again mentioned that they'll work with whatever we want.

We probed a bit on security and SOC2, but she said that her IT person would know those things.

Events: They manage events. The example they gave of a large event included 2,000 attends for a multi-day event with (I believe) 147 vendor booths. They can also manage single-day, 100-person events.

Member Retention

- Recommends that we build a Member Journey Map

    - What a year looks like

    - Touch points throughout the year (3 month, 5 month, etc.)

    - Plus response to random connections

- Membership should constitute 30-50% of our revenue, maximum

They have one in-house IT person. She mentioned they have a hybrid work environment, and their in-house IT works with an outsourced ITSP. (Her proposal names them as J4.)

Advocacy and Lobbying: They were founded in part by joining two companies, one of which focused on lobbying/advocacy. That partner is retiring soon, so AM Group will be moving away from in-house advocacy work. They will still outsource that function as needed.

Strategy: AM Group will provide strategic planning sessions with us for no additional charge.

They are also able to provide Board training on an annual basis at no additional charge.

Chris noted that Gloria is not a great sales person. I believe there was general agreement on this.

Personally, I give her high marks for the marketing they offer, although I also think she is not the best sales person.

I also give her high marks for the focus on strategy, training, and helping our organization to build a strategic plan.

Katherine noted that Gloria seemed almost overly-flexible. She'll work with any software, any tools, anything we want. In comparison, Jim from First Point was very clear that we need to use specific tools that are compliant with association industry standards.