



**Karl's Notes**

**Interview with Jim Booth from First Point AMC**

**Present**

- Jim Booth, First Point
- Amy B
- Denis W.
- Jeff G.
- Karl P.
- Katherine V.
- Steve K.

**Not Present**

- Chris B.
- Corey K.
- Larry M.
- Heather J.

Jim is quite interested in our competitive landscape and wants to make sure we can differentiate ourselves.

"Membership grows for one reason: Your value, that you provide to individuals, aligns with their needs or their belief systems."

- The stronger the value proposition, the easier the growth.
- The NSITSP has not developed a enough to be free-standing
- We need to identify the channel (potential members) and craft our messaging

Recommends that membership campaigns be tied to events and milestones.

Collaboration: They use Teams (preferred), as well as Google docs and Basecamp



#### Re: Committees

- They do not include attending all committee meetings in their RFP.
- Recommends a committee liaison who attends all meetings and reports to the board
- Or require chairs to report to the board in a formal manner
- Or assign specific board members to attend specific meetings and report to board.
- re: David Allen (Getting Things Done), we should ask committees WITNS – What is the next step?

The AMC fee can be adjusted down or up, depending on scope of work.

- Do not buy a small scope of work and then expect everything. We assured him that we understand. We can't buy Silver and expect them to deliver Platinum.

#### 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

#### Web site/Association Management software

- They cannot touch our current web site as it is not SOC2 compliant and this AMC is accredited, so they need to comply with GDPR and other standards
- They work with Wild Apricot
  - This is portable in the sense that they can simply share the admin password

For finances, they use and recommend Dynamics. This is NOT portable. It would require an export to move our financial records to another AMC.

#### Events

- They can manage events and regularly work with organizations who have up to 2,500 people at an annual event

Social Media: They have very strong competence here. The person who manages social also does press release and other marketing.