

More Margin, Less Manual

AI Strategies for a Leaner AMC Operation

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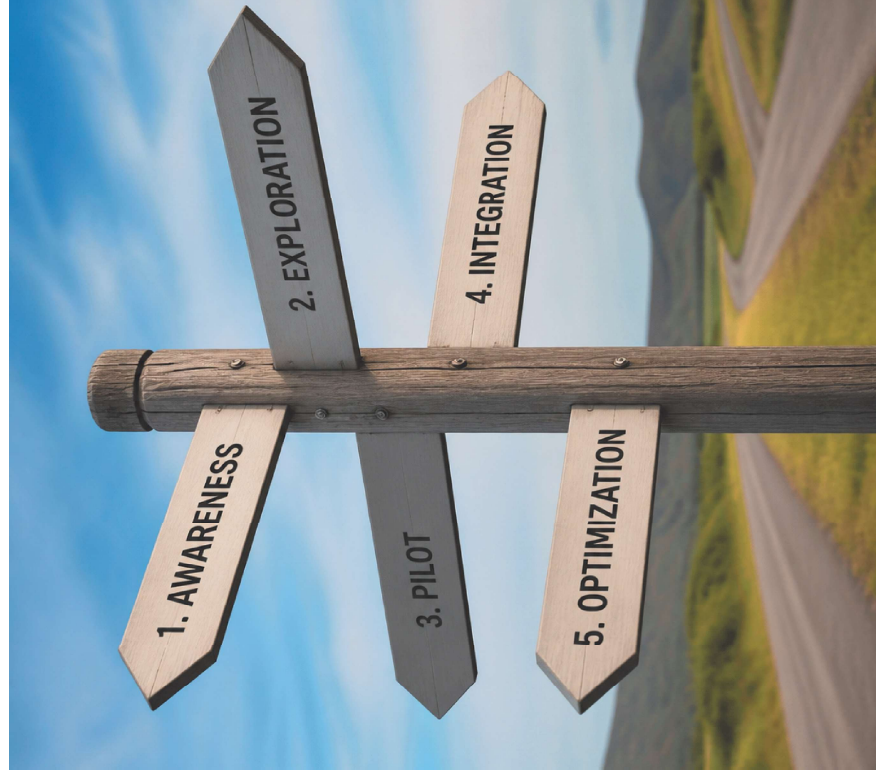
AI's Current Impact
Mentimeter Poll - Scan QR or
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Poll 2: AI Adoption Stage

- A — Using it personally, not systematically
- B — A few staff using it, no real structure
- C — Active in some areas, inconsistent in others
- D — We have a strategy and are building on it

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AI for AMCs is different

AI has a unique value proposition for AMCs vs. Associations

The Owner's Frame

Unlike Association executives, you own the firm, and you're not a non-profit!



- Every efficiency gain goes to your margin.
- Every error lands on your desk.
- Every staffing bet is your call.

The AMC Competitive Edge in Services

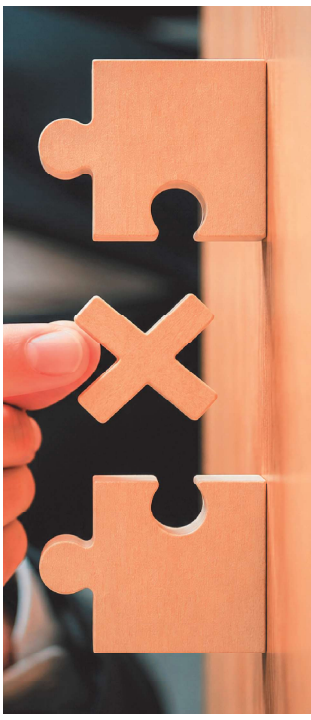
You build it once. It works for every client.

In-house association staff



Build workflows for one org. Limited scale of return.

Your AMC



Build once, deploy across your portfolio.
Same investment, multiplied return.



Four Demos to Reclaim Time

- Winning business - writing RFPs
- Delivering client work - generating board reports
- Member-facing services - email marketing campaigns
- Protecting the firm - contract review



Winning Business

RFPs. Proposals. New Client Onboarding.

Use Case: RFP Responses

Demo – Claude Projects

- Create a project
- Add your firm's context & templates
- Upload RFP and prompt for response
 - Get a structured draft to edit
- Request formatted document using your template

Watch Out!

- Don't let AI handle your pricing & timelines
 - It won't know your pricing nuances
 - It won't know your capacity
- AI will fill gaps with plausible-sounding details.



Delivering Client Work

Board reports. Financial summaries. Meeting minutes. Project updates.

Use Case: Board Report via Skill

Demo – Claude Skills

Watch Out!

- Paste monthly financials.
- Skill knows the format and client.
- Draft ready to review and send.
- Use a paid account so client financials stay in your environment.
- Shared or cloud tools carry data risk.
- Talk to IT or legal before going deep.

What is an AI Skill?

A skill remembers so you don't have to.

- No re-explaining every time.
- Consistent output across all clients.
- No sharing projects or chats.
- Any staff member can use it.
- Use your LLM to help you build it.



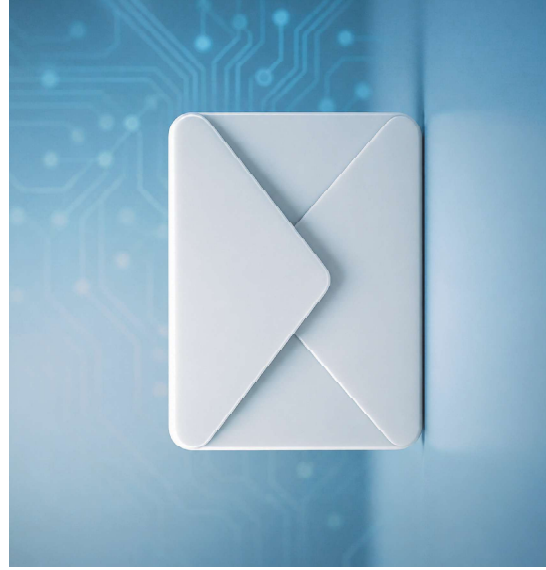


Member-Facing Services

Automating member services can be a differentiator for your clients.

Use case: Renewal Engagement App

Personalized outreach. Automated and at scale.



- Pull basic engagement data from any client's AMS
- Generate a personalized profile page per member
- Link it directly in the renewal email to show the member their history
- Same app works for every client in your portfolio, every year

Member Services Use Cases

Three places to apply this immediately

1

Member inquiry chatbot
Deflects routine questions from staff across all clients.

2

Renewal-time engagement reports
Personalized reports at scale

3

New member onboarding sequence
Consistent, tailored to each association.



Protecting the Firm

Contracts, vendor agreements, client agreements, reviewed and summarized quickly.

Use Case: Vendor Agreement Review

Demo – Claude & ChatGPT

Watch Out!

- Flags unusual clauses.
- Identifies missing standard provisions.
- Summarizes key terms.
- Prepares you and saves time in discussion with your legal team.
- First pass. Not final answer.
- AI misses jurisdiction-specific nuance.
- It doesn't know what it doesn't know.
- **Your attorney still makes the call.**

Tool Comparison

Same Capabilities. Different Approach.

Claude Skills

- Configured once, activates automatically in any conversation
- Works in the background — no special navigation
- Build it for your workflow, use it everywhere

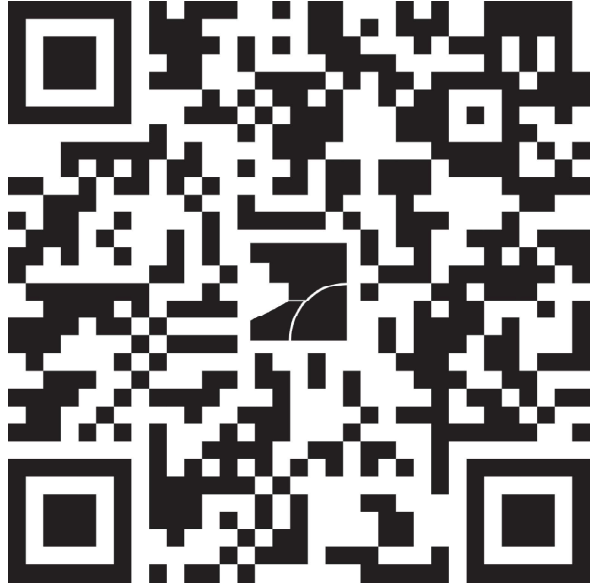
ChatGPT Custom GPT

- Lives at a specific link you open and run deliberately
- Shareable — send a client or board a link to a pre-configured assistant
- Useful when you want someone else to use it without knowing how to prompt

One approach travels with you.
The other travels to whoever you send it to.

Now what?

Where do you go from here?



Possible AI Workflows

What's one workflow your AMC does for almost every client that you wish AI could handle?

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What's your next step?

What is the immediate next step you can take to use AI this week?
What workflows or skills do you want to investigate?

Turn to your partner and share.
Exchange emails to check in before June 30

What's Coming Next in AI

Beyond prompting and chat tools. Connected AI automations that allow next-level organization efficiencies.



Connectors

AI inside your existing tools.



Apps

Web-based applications that perform specific or niche functions



Agents

AI that takes actions on your behalf.

Questions?

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