

## AMS OVERVIEW

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PULLING TOGETHER WITH  
ONE GOAL IN MIND. **YOURS.**





# THE PROFESSIONAL ASSOCIATION MANAGEMENT LEADERS TURN TO...

*When They Are Ready to Lead an Industry.*

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UNIVERSITY OF  
SAN FRANCISCO

School of Law  
McCarthy Institute for  
Intellectual Property  
and Technology Law





# THE AMS ADVANTAGE

## Who we are

- ✓ AMS is a small boutique firm focused on the unique needs of corporate based technology fora. (Est.1997)
- ✓ We are known for our “high touch” customer service
- ✓ We are AMC Institute Certified.

## Why we are different

- ✓ Fully dedicated and accountable staff that knows you and your organization.
- ✓ Our job is to meet your needs without expensive overhead.
- ✓ We make budgeting easy with a flat monthly fee. We won't nickel and dime you.



# THE **AMS** ADVANTAGE

## **Expertise**

- ✓ AMS has close to 20 years of time-tested experience starting and managing forums. We understand what it takes to be successful

## **Dedicated Staff Model**

- ✓ Working with the Board, AMS's leverages internal resources to provide a turnkey solution

## **Scalability**

- ✓ AMS provides services without the expensive overhead associated with a self-staffed model. No facility costs, no HR related headache and expenses, no hardware expenses, etc.... We simply meet your membership needs



# START UP SERVICES OFFERED

## Pre Launch and Founders Support

- ✓ Nearly two decades experience in starting up forums

## Critical Organizational Templates

- ✓ Bylaws and IPR best practice guidance
- ✓ Antitrust policy template
- ✓ 501(c) 6 Filing
- ✓ Articles of Incorporation
- ✓ CA Tax exempt status





# BUILDING SUCCESSFUL INDUSTRY INITIATIVES

## **Membership Recruitment and Retention**

- Provide complete membership services to facilitate growth and stability of the organization.

## **Financial Services**

- Budget creation and management, yearly audits, and monthly financial reporting

## **Meeting Planning**

- World-class meeting planning services, web-based registration and A-Z coordination and facilitation

## **Association Resources Online (ARO)**

- Internally-developed web solution for standards development, balloting, member communications, calendaring and other committee/member collaborative needs.

## BRINGING OPERATIONAL EXPERTISE TO THE TABLE..

### **Program Coordination and Facilitation**

- Board, Marketing and Technical committee support

### **AMS Event Services**

- Experienced internal group with worldwide relationships for the planning and implementation of cost-effective meetings, trade shows and plugfests.

### **Publication Capabilities**

- Experience editing and publishing technical standards documents.

### **Certification Programs**

- Experience facilitating logo programs and other technology certification initiatives.



## MEMBERSHIP SERVICES

- ✓ **Member and prospect database management**
- ✓ **Membership application verification and approval**
- ✓ **Membership renewal management**
- ✓ **Membership information dissemination**
- ✓ **Membership surveys**





## FINANCIAL SERVICES

- ✓ **Detailed monthly financial statements**
- ✓ **Coordinate year-end audits or reviews**  
(fee billed separately)
- ✓ **Budget development**
- ✓ **Annual tax returns** (fee billed separately)
- ✓ **Expense management**
- ✓ **Income processing including merchant account and wire management**
- ✓ **Online payment processing**
- ✓ **Investment coordination**



## AMS EVENT SERVICES

**An internal team you can tap into for any size event. . .held anywhere**

- Conference, trade show and meeting planning
- Project planning and contract negotiation
- Web-based registration services
- Session and speaker coordination
- Site inspection and selection
- Budget creation/management
- Post-event analysis

## ASSOCIATION RESOURCES ONLINE (ARO)

**The web-based communication tool specifically designed for associations seeking a proven foundation for technology standards development and rapid membership growth.**

- Hosted by AMS. Customized and scalable to your needs.
  - ✓ Standards development
  - ✓ List management
  - ✓ Document management and archiving
  - ✓ Meeting registrations
  - ✓ Member communications
  - ✓ Calendaring and balloting
  - ✓ Project management





## BRINGING IT ALL TOGETHER

*AMS offers the following services to help launch Your Alliance.*

*Together we create a successful industry initiative.*

- **Start up services**
- **Membership services**
- **Executive Committee management and support**
- **Financial management**
- **Certification program management**
- **ARO tool and website/ mail list hosting and maintenance**





## WHY AMS IS HOME TO **INDUSTRY LEADERS**

- ✓ **Association management is our only business**
- ✓ **Dedicated and experienced staff leveraging internal service groups**
- ✓ **Sophisticated document and communication tools**
- ✓ **Experience starting up, building and supporting leading associations**





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