

AMC POWER INDEX DATA CHEAT SHEET

In May, we will celebrate the launch of the inaugural AMC Power Index! To best prepare your team, we've included the type of questions we'll be asking. The questions below are being reviewed and validated by AMCs of all sizes, including the large and extra-large AMCs. For ease of data collection on the part of the AMC, there are a series of dropdown options, checkboxes, and open-ended questions. Please reach out to Molly Lopez (molly.lopez@batonglobal.com) if you have any questions.

AMC DEMOGRAPHICS

1. What was your firm's fiscal year 2021 total revenue?
2. What was the fiscal year 2021 total revenue for your largest full association management client?
3. What was the fiscal year 2021 total revenue for your smallest full association management client?
4. What was your firm's fiscal year 2021 total number of FTEs?
5. What was your firm's fiscal year 2021 Employee Turnover Rate? Divide the sum total of the number of employees that left during the FY by the average number of employees that worked within that FY. Multiply that number by 100 to calculate the employee turnover rate.

CLIENT DEMOGRAPHICS

1. What is your approximate full association management client conversion rate for fiscal year 2021?
Customer conversion rate is the percentage of prospects (or associations who received a proposal for your services) identified by your firm who hired your firm for services.
2. What is your annual full association management client retention rate for fiscal year 2021?
Customer retention rate measures the number of customers a company retains over a given period of time. It's expressed as a percentage of a company's existing customers who remain loyal within that time frame.
3. Please indicate which services you provide to your full association management clients: *Select all that apply*
4. Please rank where you get the majority of your referrals from, #1 for the most referrals and #5 for the least referrals for fiscal year 2021:
5. How many full association management clients discontinued using your services in fiscal year 2021?
6. How important is your accreditation status to your full association management clients?
7. How many of your current full association management clients came from each of the following situations:

8. For the full association management client that came from the stand-alone model, what reason(s) did they indicate for hiring your firm?
9. Where are your current full association management clients located?
10. Please indicate the number of full association management clients in each location:
11. Please indicate the number of full association management clients you have in each of the categories below:
12. Which industries do your full association management clients represent? *To select multiple, hold down the CTRL button.*
13. Please indicate the number of association full association management clients you have in each industry:

SERVICE PROVIDERS

1. Please indicate the service providers most frequently used by your full association management clients and your AMC including Accounting Software, Bank or Credit Union, Credit Card company, Office Supplies company, Video Conferencing, Association Management System, Learning Management System, Customer Management System(s), CPA firm(s), Law firm(s), Financial Management/Insurance firms, PEO/Employee Benefits firms, Business Consulting/Brokerage firms, Credentialing services, grant writing firm(s), digital marketing companies, Marketing firms, and Recruiting firms.

CLIENT EVENTS

1. Please indicate the total number of events booked for full association management clients for fiscal year 2021:
2. Please indicate the average number of attendees at your largest events for fiscal year 2021:
3. What was the total spend on meetings/conferences/trade shows booked for your full association management clients for fiscal year 2021?
4. Please indicate the approximate number of hotel room nights booked for full association management clients for fiscal year 2021:
5. Please indicate any hotel group(s) you have booked with in fiscal year 2021: *Select all that apply*
6. Please indicate the airline, rental company, transportation company, booking partners, meetings/conferences/trade shows mobiles apps most frequently used by your full association management clients or your AMC:
7. How often does your organization use convention and visitor's bureaus to help plan meetings/conferences/conventions?
8. Please indicate the convention and visitor's bureaus you have used previously or plan to use in the future:

**The order and wording of questions may adjust prior to the launch in May.*