

WHICH HAT AM I WEARING?

Managing the Multiple Roles,
Multiple Clients,
and Multiple Expectations of AMC
Work

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Strategic Planning • Governance • Membership



How Many Hats Before 10:00 A.M.?

Think about one ordinary AMC morning.

How many times have you already shifted roles?

COUNT

1–2

Then compare with
someone near you.

Where did the fastest or most awkward switch happen?



This Is Not a Time-Management Problem.

Multiple clients



Multiple scopes



Shared capacity



Distinct cultures

ROLE COMPLEXITY

A calendar can tell you when to act.

It cannot tell you which obligation should govern the moment.



You Are Working Inside Four Systems at Once

1 Client Mission + Governance

What best serves the association, its members, and the board's fiduciary work?

2 Contract + Scope

What has the AMC promised and what level of time and service does the agreement support?

3 AMC Enterprise

What protects quality, margin, reputation, retention, and responsible growth?

4 Shared Team + Portfolio

What capacity exists across finance, meetings, marketing, technology, and other clients?



Six Hats. One Professional.

01 ASSOCIATION EXECUTIVE

What advances mission?

02 BOARD LIAISON

What helps the board govern?

03 CLIENT PARTNER

*What strengthens the
relationship?*

04 SCOPE STEWARD

What did we agree to deliver?

05 ENTERPRISE BUILDER

What strengthens the AMC?

06 TRUSTED ADVISOR

*What does the client need to
hear?*



Hats 1–2: Lead the Association. Enable the Board.

Association Executive

Focus: mission, strategy, member value, outcomes

Overuse risk: solving everything yourself or letting client urgency consume the portfolio

Board Liaison

Focus: decision quality, roles, governance rhythm, follow-through

Overuse risk: becoming the board's order-taker—or its unofficial decision-maker

The line to protect: support governance without absorbing governance.



Hats 3–4: Build the Relationship. Protect the Agreement.

Client Partner

Focus: trust, responsiveness, context, long-term success

Overuse risk: saying yes to preserve goodwill while silently borrowing capacity

Scope Steward

Focus: commitments, effort, tradeoffs, service quality

Overuse risk: using the contract as a shield instead of a conversation

The line to protect: be flexible without making invisible promises.



Hats 5–6: Grow Responsibly. Tell the Truth.

Enterprise Builder

Focus: retention, reputation, margin, opportunity, scalable value

Overuse risk: turning every client need into a sales pitch

Trusted Advisor

Focus: candor, judgment, consequences, better choices

Overuse risk: prescribing before listening—or confusing expertise with authority

**The line to protect: recommend what serves the client,
even when it creates a harder conversation.**



The Problem Is Rarely the Hat.

It is wearing the

WRONG HAT

at the wrong moment —

or failing to tell others

WHEN YOU CHANGED.



Four Tensions Show Up Again and Again



Which Tension Is Costing You the Most?

Serve ↔ Steward

1 2 3 4 5

Deliver ↔ Develop

1 2 3 4 5

Urgency ↔ Capacity

1 2 3 4 5

Consistency ↔ Customization

1 2 3 4 5

Rate each one mentally. Keep your highest score.



Run a HAT CHECK Before You Commit



HAT

Which role does this moment require?



AUTHORITY

Who owns the decision?



TERMS

What do scope and time allow?



CAPACITY

Who is available—and what moves?



HUMAN CONTEXT

What culture, history, or personality matters?



EXPECTATIONS

What does success mean, and by when?



COMMUNICATE

Who needs clarity, choice, or documentation?



KEEP / EXPAND / STOP

Deliver, renegotiate, or decline?



Scenario: The Friday-Afternoon ‘Favor’

**“We need a sponsor prospectus ready for Monday’s board call.
Can your team just pull it together?”**

HIDDEN FACT 1

The work is not in the current scope.

HIDDEN FACT 2

Marketing is committed to two other clients.

HIDDEN FACT 3

The request reveals a real revenue need.

Which hat comes first? What do you say before you say yes?



A Strong Response Holds More Than One Truth

YES

The revenue need is real.

AND

The current request exceeds scope and available capacity.

“I understand why Monday matters. Before I commit the team, let me confirm the effort and what would need to move. We can look at reprioritizing current work, adding capacity, or building a lighter Monday-ready version.”



Boundaries Without Bureaucracy

1

ALIGN

**Name the shared
outcome**

*I understand why
this matters.*

2

LOCATE

Place the request

*This sits beyond /
ahead of our
current plan.*

3

TRADE OFF

**Make impact
visible**

*To do this, we would
need to move, add, or
reduce...*

4

CONFIRM

**Choose +
document**

*Which option best
protects the
priority?*

A boundary is clearest when it includes a path forward.



'Out of Scope' Is a Diagnosis—not the Opening Line.

Instead of...

That's not in the contract.

Try...

**That request goes beyond our current agreement.
Let's look at the best way to resource it.**

Instead of...

My team can't do that by Friday.

Try...

Friday is possible only if we shift another commitment. Here are the choices.

Instead of...

The board needs to decide.

Try...

I can prepare the decision. The board retains ownership of the choice.



Grow the Relationship—Not Just the Scope

1

PATTERN

What recurring need are we seeing?

2

IMPACT

What is it costing the client or team?

3

OPTION

What level response would help?

4

INVESTMENT

What capacity, fee, or tradeoff is required?

Expansion is credible when it begins with evidence and not quota.

Sometimes the best recommendation is no additional service, yet.



Shared Services Need Visible Demand

FORECAST

What is coming?

HAND OFF

What does 'ready' mean?

PRIORITIZE

What wins when work collides?

CLOSE

What changed and who knows?

Your client promise becomes a team promise the moment another person must deliver it.



Flex Your Style. Keep Your Standards.

FLEX

- Pace
- Tone
- Channel
- Meeting rhythm
- Level of formality

KEEP

- Integrity
- Role clarity
- Scope visibility
- Follow-through
- Respect for capacity

Adaptation builds relevance. Consistency builds credibility.



Give Your Portfolio an Operating System

SCOPE

Where are we drifting?

CAPACITY

What demand is approaching?

PROMISES

What have I committed—and to whom?

SIGNALS

What recurring need may deserve a solution?

ESCALATION

What needs a decision before it becomes a fire?



Credibility Compounds Across Hat Switches

CLARITY

+

CONSISTENCY

+

CANDOR

TRUST

People can handle a hat change.

What erodes trust is discovering the change after the decision was made.



Choose One Hat to Wear More Deliberately

When _____

happens, I will _____

so that _____

Take 60 seconds. Make it specific enough to use next week.



WEAR THE HAT.

NAME THE HAT.

KNOW WHEN TO CHANGE IT.

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