

# Association Management Company Sees Growth and Efficiency by Implementing Self-Service with MemberClicks

## At a glance

<b>Organization name</b> Utility Exchange		<b>Type</b> Association Management Company (AMC)	<b>Solution(s) used</b> Oasis AMS	
<b>Industry</b>  <b>Energy and Water Utilities and Allies</b>	<b>Staff Size</b>  <b>2</b>	<b>Member Count</b>  <b>161</b>	<b>Annual Revenue</b>  <b>\$1M</b>	
<b>Challenge</b> UtilityExchange.org, an AMC, was using disparate systems to manage its clients, which led to wasted resources, administrative frustration and lack of a member-centric experience.		<b>Solution</b> Through the use of an all-in-one system, UtilityExchange.org admins and members have both seen a more streamlined experience, which has given a boost to customer service, membership growth and engagement.		



**Peak Load Management Alliance (PLMA) and Utility Exchange are two distinct member communities both administered by UtilityExchange.org to help energy and water utility staff and allies mostly throughout North America to network and learn from each other. In the association space, UtilityExchange.org is known as an association management company (AMC), currently managing the two associations, one of which is a non-profit.**

As AMCs are focused not only on the success of their clients, but also on their own business growth, UtilityExchange.org is attracted to the commitment MemberClicks has made to building a platform of connected solutions that allow organizations to unlock more value quicker.

“We love what MemberClicks does and I love that you are adding different modules,” said Ed Thomas, UtilityExchange.org’s executive director. “We love that we can also share best practices with other organizations who are MemberClicks customers.”

## **Streamlining Accounts**

Before the organization came to MemberClicks, however, each of the associations managed by UtilityExchange.org were using separate AMS solutions — mostly for event registration capabilities, as each has a handful of meetings each year. Thomas, one of two full time staffers for the AMC, saw an opportunity to create a better experience for each association’s membership by utilizing one management solution for both.



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“We could’ve gotten by with simply using Eventbrite or another event registration software like Cvent, but we wanted to go down the path of strategically treating these folks like an association to keep them together between meetings and engage them and send emails, track registration and all that,” he said.

The desire to create a member-centric experience was important to UtilityExchange.org to achieve client satisfaction. And because they manage multiple events across multiple clients, MemberClicks has provided a solution that works well for each client’s needs.

“MemberClicks maintains our sanity to be able to work across the platform for scaling up or scaling down. The other guys didn’t scale both ways,” Thomas said. “The platform is great for individual relationships, but also works really well —and getting better every day — about engaging at the organization-level to help us connect and relate to the individuals within each organization.”

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## **Giving Members a Desirable Experience**

In addition to having the administrative freedom to scale in various directions depending on client needs, having MemberClicks has also given UtilityExchange.org the ability to pass along the ease-of-use convenience to their members. Tiger Adolf, operations director at UtilityExchange.org, said that a member’s ability to self-serve has been a tremendous benefit.

“The automatic invoice reminders have been very helpful,” she said. “They go out automatically in a staggered timeframe which has really helped people respond. The most powerful self-service feature is having the ability for members to be able to click the link in an auto-generated email to pay an event or membership invoice.”

“We have members who are apologizing for not paying their bill sooner or that

we haven't gotten payment yet," Thomas added. "It's incredible for us to be able to serve people who want to serve themselves in this way."

Thomas further acknowledges that the memberships of their clients represent varying degrees of comfort with technology and that having the MemberClicks solution opens UtilityExchange.org up to be approachable regardless of preference.

"We clearly experience a digital divide among our members," he said. "On one hand, you have people wanting to call up and ask 'What's this person's phone number?' Or they want to give you their credit card over the phone. And then other folks who just want to do it all themselves. MemberClicks allows us to serve both of those audiences."

## Doing More Without Spending More

With MemberClicks as its management hub, UtilityExchange.org has seen growth in membership, as well as event attendance.

"When we took over management of our PLMA client, they had 42 member organizations, and they are over 160 now," Thomas said. "PLMA's in-person meetings had just 75 people in 2013, but attracted 350 people to the fall 2019 meeting. Their spring 2020 online conference attracted over 1,100 registrants."

Thomas says this growth can be a byproduct of the tool itself. But what strikes him even more is how MemberClicks has allowed his two-person staff to be infinitely more effective with their time and offer a more personal experience for anyone interacting with UtilityExchange.org.

"MemberClicks has certainly allowed us to grow the organization from that size with basically two full-time employees," he said. "Our member organizations are large organizations like Google and Con Edison, and they're used to doing

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sophisticated activities on a big scale, and the MemberClicks system helps us keep it friendly to the member that is logging in; that is writing the dues and registration check. We love that when someone logs in, they see their name badge because it has that really homey feeling. You guys have definitely played a role in our success. The scalability and responsiveness have been a key success factor for us.”

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