

TECHNOLOGY SELF-DIAGNOSTIC CHECKLIST

Is your association's digital ecosystem ready for what's next?

Use this checklist to honestly assess your organization's current technology health. Check every statement that is true today, not aspirationally true. Add up your points at the end of each section, then total all four sections for your overall score.

Section A: Data & Integration (15 points possible)

Statement	Yes	Pts
We know exactly how many systems currently hold member or customer data.	☐	+2
Our systems exchange data bidirectionally, not just one direction.	☐	+3
We have a single, authoritative record for each member.	☐	+3
Staff do not use spreadsheets or manual workarounds to fill integration gaps.	☐	+3
We can pull a complete view of any member's engagement across all platforms.	☐	+3
Our data is clean, deduplicated, and regularly audited.	☐	+2

Section subtotal (add checked points)

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Section B: Member Experience (15 points possible)

Statement	Yes	Pts
Members access all services with a single login (SSO).	☐	+3
The member journey from join to renewal is fully self-service online.	☐	+3
Members can update their own profiles and practice information at any time.	☐	+2
There are no dead ends, duplicate logins, or manual workarounds in the member experience.	☐	+3
Our website passes a basic accessibility audit (WCAG 2.1 AA).	☐	+2
Members can connect with peers through a modern, moderated online community.	☐	+2

Section subtotal (add checked points)

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Section C: Staff Burden & Operations (14 points possible)

Statement	Yes	Pts
Staff spend less than 10% of their week on manual data re-entry or reconciliation.	☐	+3
Certification or credentialing tracking does not rely on spreadsheets.	☐	+3
New member onboarding is automated, no manual staff steps required.	☐	+2
Our email marketing platform pulls live data from our AMS automatically.	☐	+2
We have documented business process maps for our three largest operational areas.	☐	+2
Staff have received formal training on all platforms they use regularly.	☐	+2

Section subtotal (add checked points)

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Section D: AI & Future Readiness (15 points possible)

Statement	Yes	Pts
We have a written AI policy that covers staff use, vendor evaluation, and data protection.	☐	+3
When evaluating new technology, we assess the vendor's AI roadmap explicitly.	☐	+2
Our content is structured so that AI search tools (Perplexity, ChatGPT, Google AI Overviews) can surface it accurately.	☐	+3
We have evaluated at least one AI-powered tool against a real, diagnosed organizational need.	☐	+2
Our AMS/hub selection accounts for future AI integration capability.	☐	+3
We distinguish between AI tools that solve diagnosed problems vs. those chasing a trend.	☐	+2

Section subtotal (add checked points)

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TOTAL SCORE (add all four section subtotals)

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WHAT YOUR SCORE MEANS

Score	Stage	What to do next
0 – 20	Foundation First	Your ecosystem has significant gaps that will undermine any new technology investment. Start with a structured technology assessment before making any platform decisions. Focus on AMS/hub selection and data integration before anything else.
21 – 38	Ready to Sequence	You have a working foundation but meaningful gaps in integration, member experience, or operational efficiency. Prioritize your next 1–2 platform decisions using the selection criteria framework. A partial assessment focused on your highest-pain areas will clarify your roadmap.
39 – 59	Ready to Layer AI	Your ecosystem is well-integrated and operationally sound. You're positioned to layer AI-powered tools and advanced personalization on a stable foundation. Evaluate AI vendors rigorously. Use your assessment framework to ensure each tool solves a diagnosed need.