

New Year, New Goals:

Planning Checklist for Associations



SET YOUR ASSOCIATION UP FOR SUCCESS WITH THIS 2026 GUIDE!

Strategic Planning & Goal Setting

- Review Mission and Vision Alignment**
Assess if current initiatives align with your association's core purpose and future direction.
- Set SMART Goals for the Year**
Define specific, measurable, achievable, relevant, and time-bound objectives for each department.
- Build a Real-Time Performance Dashboard**
Establish KPIs and implement live reporting mechanisms, not just scheduled reports, to track progress throughout the year.

Data & Analytics

- Clean and Organize Member Data**
Ensure your member database is accurate, complete, and properly segmented. This will serve as the foundation for AI-ready infrastructure.
- Automate Reporting and Trigger-Based Alerts**
Move beyond scheduled reports to real-time alerts that notify your team when key KPIs dip or spike.
- Apply Predictive Analytics to Member Retention**
Use data analytics to identify at-risk members before they lapse and proactively drive re-engagement.

Member Experience Enhancement

- Conduct Member Needs Assessment**
Survey members to understand evolving needs and expectations for the new year.
- Update Member Journey Map**
Review and optimize touchpoints across the entire member lifecycle.
- Design Personalized Engagement Pathways**
Move beyond generic programs. Build segmented, behavior-triggered journeys that increase member participation and value perception.

Digital Transformation

- Evaluate Current Technology Stack**
Assess the effectiveness of existing systems and identify gaps or improvement opportunities, including AI-native capabilities.
- Plan Data Integration Strategy**
Ensure all platforms (AMS, CRM, email, and event tools) share data bidirectionally to eliminate silos and enable AI-ready infrastructure.
- Define Digital Security Protocols**
Review and update data protection measures and compliance procedures.
- Evaluate Your AMS for AI-Native Features**
A wave of association management platforms are now releasing AI-embedded versions. Assess whether your current system is keeping pace.

Communication Strategy

- Review Communication Channels**
Evaluate effectiveness of current communication methods and platforms.
- Build an AI-Assisted Content Strategy**
Use AI tools to help ideate and scale content production and maintain a consistent content calendar. Incorporate EEAT principles (experience, expertise, authority and trust) to preserve an authentic, human brand voice and member relevance.
- Set Up Feedback Loops**
Establish mechanisms for consistently collecting and acting on member feedback.

AI Adoption & Strategy

- Assess Your AI Readiness**
Evaluate data quality, staff capacity, and technology infrastructure to determine where AI can be responsibly and effectively deployed.
- Implement AI for Member Engagement**
Explore AI-powered tools for personalized member communications, chatbot-assisted or agentic support, and automated renewal or re-engagement sequences.
- Establish an AI Use Policy**
Define clear guidelines for how AI tools are used by staff, including content creation, data analysis, and member interactions, to ensure accuracy, transparency, and member trust.

Industry Trends & Innovation

- Research Industry Developments**
Stay informed about emerging trends and their potential impact with specific attention to AI adoption rates within your sector and peer associations.
- Pilot at Least One AI or Automation Initiative**
Commit to identifying and launching one concrete AI or automation initiative this year, not just planning for it.
- Allocate Resources for Growth**
Budget for technological improvements, staff training, and strategic initiatives that position your association ahead of the curve.



Need assistance reaching your association's goals? IBC can help.



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