Claude for Associations

fusionSpan

Claude that does the work across your systems, not just reports on them.

STAFF ASKS CLAUDE

> Renew Maria Lopez, register her for the Annual Meeting, and enroll her in the ethics course.

CLAUDE DOES IT ACROSS YOUR SYSTEMS

- ✓ Membership renewed — AMS
- ✓ Registered for Annual Meeting — Events
- ✓ Enrolled in ethics course — LMS
- ✓ Confirmation sent — Outlook

Confirmed by staff before posting

YOUR CORE PLATFORM

- Fonteva
- Nimble AMS
- fusionCore
- Salesforce

Claude

Reads, decides, and acts

WHERE YOUR STAFF WORK

- **Microsoft 365** — Outlook · Teams · SharePoint
- **Google Workspace** — Gmail · Drive · Calendar
- **Slack** — Channels and messages

YOUR OTHER SYSTEMS

- Events
- Learning (LMS)
- Community
- Email marketing
- Accounting
- Payments
- Certification
- Abstracts
- Data warehouse

Connected through Claude connectors, custom MCP servers, and fusionConnect, our integration platform

Quickstart

2 WKS Connected to your systems, first actions live.

- Salesforce + 2 tools
- 3 actions live
- Staff training

Service Actions

3–4 WKS Member requests, end to end.

- Place orders
- Renew members
- Register attendees
- Issue certificates

Insight to Action

2–3 WKS Spot the trend and act on it.

- Lapsing members
- Bulk renewals
- Outreach tasks

Workflow Agents

3–4 WKS Runs across systems, no prompt needed.

- Membership applications
- Award nominations
- Certification files
- Abstracts

Action Guardrails

1–2 WKS Decide what Claude can do, and for whom.

- Role permissions
- Approval thresholds
- Usage policy

BUILT INTO EVERY ACTION

- **Your permissions** — Only what the user can do
- **Confirm first** — Nothing posts without a yes
- **Full audit trail** — Every change logged

Claude Certified Services Partner

fusionSpan is Certified in the Claude Partner Network.

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