

How to Find Your Next Membership Management Software

5 steps for large associations and unions



1 Choose your timing.

Thoughtfully choosing when to upgrade your software will help to ensure the greatest benefit, lowest cost, and most positive impact across your organization.

Start well in advance

Present your pitch for new software well before you foresee implementing the software. By the time you get budget approval, select the right product, get the system installed, and train your employees to use it, it won't be a minute too soon.

Implement during IT's slower time

Consider scheduling your new software implementation around your IT team's calendar. They'll not only appreciate it, but they'll also be more available to you during the process.

Time it after your busy season

Plan to implement your new software directly following your busiest time of year. This approach will give you more time to implement the new system before your next busy season.

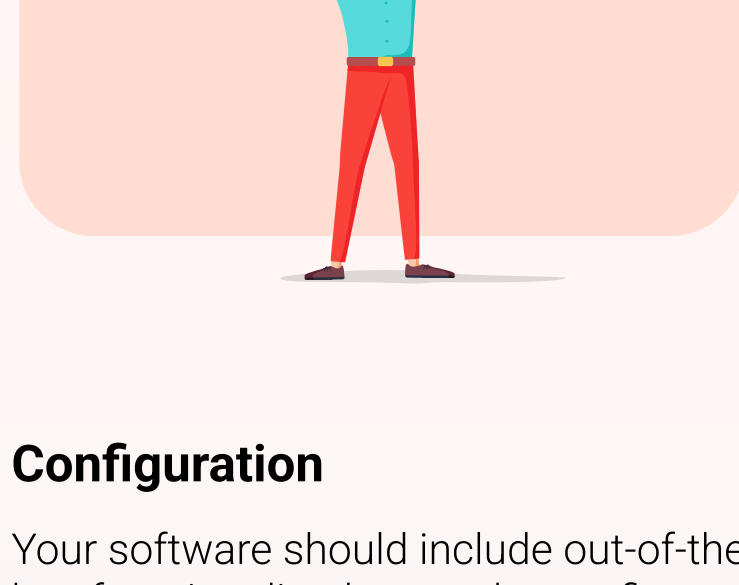
Learn pro tips on how to keep your implementation on time and on budget with this blog: [How to stay on budget with a new membership management software implementation.](#) Change might be hard, but it can also be rewarding with the right planning.

[Learn more here >](#)

2 Develop a list of must-have functionality.

Talk with other departments about their needs and the limitations of your current software. Then, build a list of features and capabilities you can't live without.

Some key areas to focus on include:

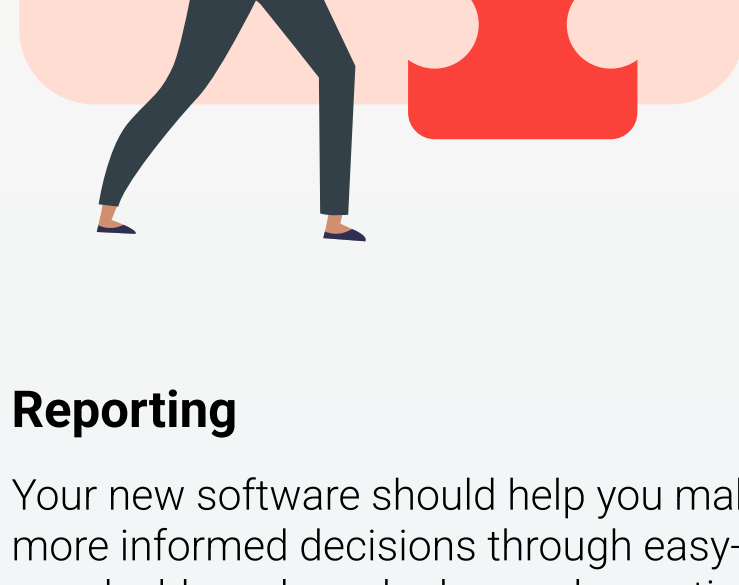
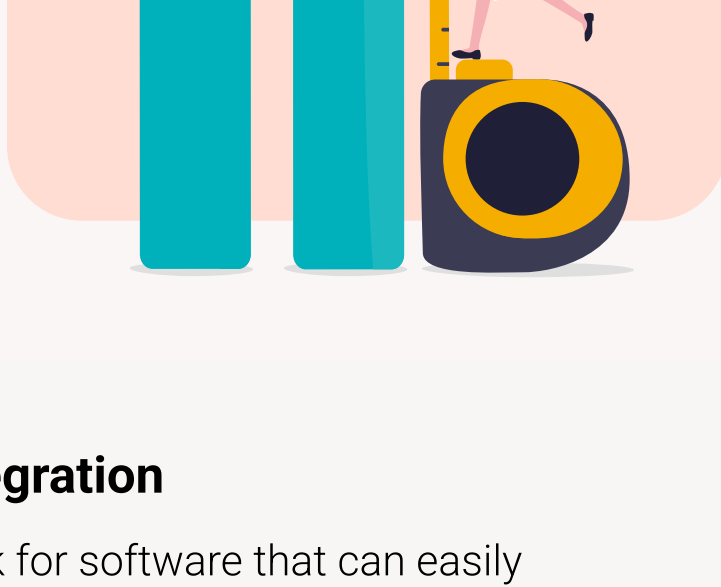


Member engagement

Your software should give you a comprehensive view of your membership, be user-friendly, and offer a full set of functionality including membership and customer relationship management and a member-facing portal.

Configuration

Your software should include out-of-the-box functionality that can be configured to fit your specific needs. If you have unique requirements, you should be able to easily modify the system to create exactly what you need.



Integration

Look for software that can easily integrate with other applications so that you can integrate it with any systems you already have and extend the software to meet future needs.

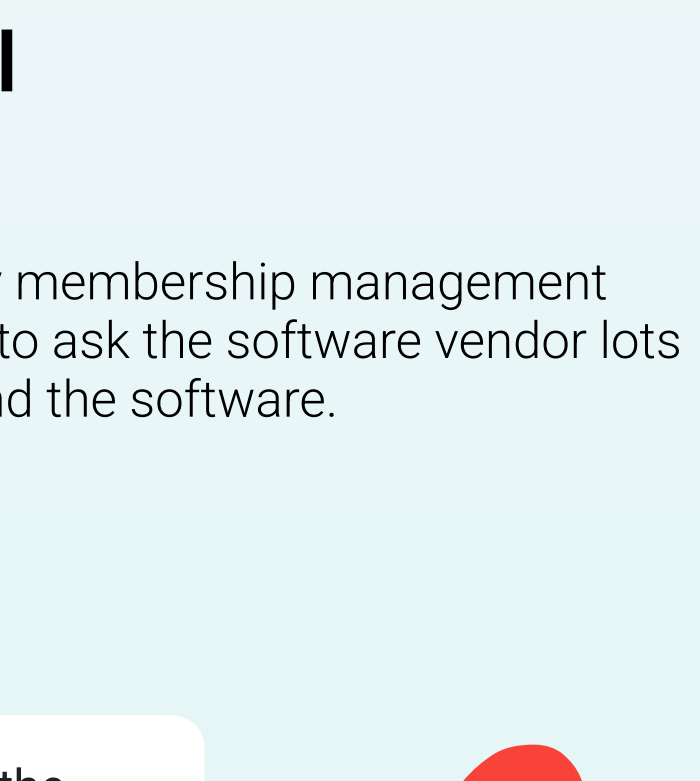
Reporting

Your new software should help you make more informed decisions through easy-to-use dashboards and advanced reporting.



Aptify is a powerful, enterprise-level solution that can do it all.

[Explore Aptify's features here](#)



3 Build a list of technical requirements.

Evaluate the technical aspects of any membership management software you're considering. Be sure to ask the software vendor lots of questions to ensure you understand the software.

Some things to ask about:

What platform the software is built on

What ways the software can be configured

What the data migration process entails

What solutions the software can integrate with

How software upgrades are handled

What training is provided/available

What it's like to work with the software vendor's support team

Download these resources to build your General Request for Proposal Requirement Matrix.

[For unions](#)

[For associations](#)



4 Present the business case.

Present the business case for new software to your executive team and board of directors. They'll need to understand why your current software isn't working well and what new software can help you achieve.



Spell out the inefficiencies

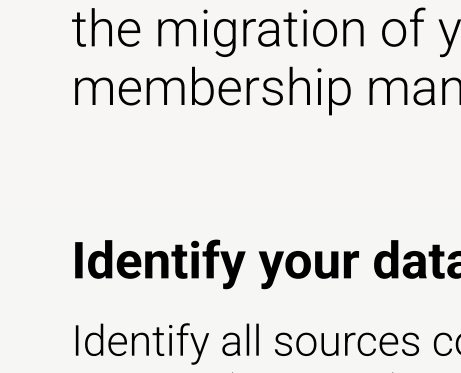
Itemize the ways your current system has been holding your organization back. These might include technical issues, inefficiencies due to manual processes, and ways you are unable to better serve your members.

Demonstrate your research

Take your list of functionality and technology needs, and for each need, list the questions you asked the vendor about how their product can help you with that need. This will help you to demonstrate that you've vetted multiple software vendors based on your organization's needs.

Define requirements in terms of team efficiency

For each feature, talk about which task it will help to complete, state which department owns the task, and estimate the current time and effort it takes to complete the task versus how much effort can be saved with the new system.



Learn how to convince your board that it's time to make a change.

This guide: [Gaining Board Approval for New Member Management Technology Budget](#) will prepare you to speak confidently about why it's time to invest in new technology.

[Get the guide](#)

5 Prepare for your data migration.

Once you have approval and have selected new software, make sure your organization is ready for the migration of your data into your new membership management software.

Identify your data

Identify all sources containing data you will (or might) migrate to the new system. Then, decide how much data you want to migrate, where it's coming from, and what state it's in.

Make sure the new software is configured properly

To implement your new system, your software vendor must know where each field in each table of your old system will end up in your new system. Be prepared to have someone on your team work with your software vendor to ensure it's configured properly.

Clean your data

The process of data cleansing helps to ensure that only accurate and complete data is migrated to the new system. Delete or merge duplicate data, purge old data, clean up inaccurate data, and fix poorly formatted data as much as possible.

Define your team's roles

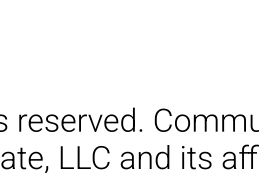
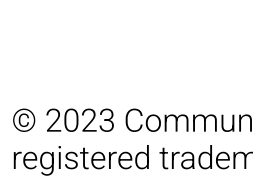
Understand who's responsible for each aspect of the data migration – your organization's staff, the software vendor, or a third-party implementation consultant. If possible, arrange for your software vendor or consultant to do the heavy lifting; they'll know the new system well and have experience from many migration projects.

TIP: The Aptify team is ready to help you implement the Aptify membership management solution to meet your organization's specific needs. Let's talk about how Aptify can help your organization.

[Contact us](#)

Take the next step.

Your organization's ability to work effectively and efficiently depends greatly on the membership management software you choose. Aptify is built to meet your complex organization's unique needs.



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