How to Find Your Next Association Management Software (AMS)

A buyer's guide for large, complex associations

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Introduction

When you select an association management system (AMS), you have multiple considerations to weigh. You have members to keep happy, expectations to meet, and a mission to serve.

The AMS you choose will determine if you will have the necessary tools to meet these expectations, engage members, and drive revenue – today, and in the future.

But when it comes to selecting a new AMS, where do you start? What features will enable your staff to best serve your members? What type of user experience and benefits are most valuable to your members?

In this guide, you'll find:

🕐 Insights for how to time a new AMS implementation

🔍 Important things to prepare for as you move your data to a new AMS

☰ Checklists of basic functionality and technology considerations and questions to ask your potential vendors

⭐ Tips on how to prepare a business case for your new AMS

Timing it right

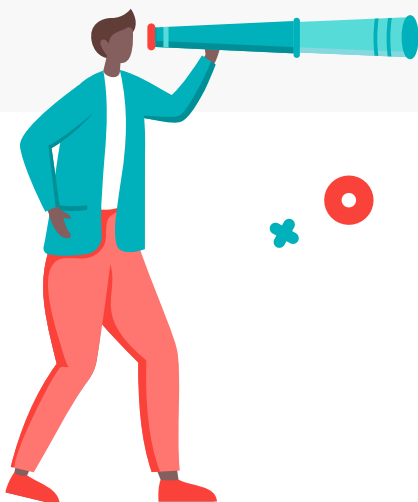When it's time to replace or upgrade your AMS, timing is everything. Here are some tips for when and how to upgrade your software for the greatest benefit, lowest cost and most positive impact across your association.

1 **Start well in advance**

Your executive team and board of directors don't always feel the same sense of urgency you do. They don't necessarily see the outdated, slow and featurepoor software you and your team have to work with every day. So, be sure to present your pitch for a new AMS as much as a year before you foresee implementing the new software. By the time you get approval in the budget, select the right vendor and product, get the system installed and train your employees to use it, it won't be a minute too soon.

2 **Get your AMS BEFORE a hiring period**

If you want a headache, try to adopt a new software system at the same time you have to onboard and train a group of new employees. Skip the hassle, and implement the software first. Train your current employees, who are already familiar with your processes, policies and procedures. Then onboard new employees and train them only on the new system. Otherwise, you'll be training new employees twice – once on the old system and again on the new.

3 **Implement during IT's least busy time**

You might be tempted to time your AMS implementation around what's best for your production and operations teams. But, consider scheduling around your IT team's calendar instead. They'll not only appreciate it, but they'll also be more available to you during the process.

4 **Time it immediately after your busiest season**

Be sure to consider your organization's overall schedule. For example, if your association has membership drives or an annual conference during specific times of the year, these are the worst times to try to get new software installed and train employees. Instead, plan the implementation for directly following your busiest time of year. That gives you time to implement the new system without running into your next busy season. It also helps ensure that staff is well acquainted with the new AMS before they have to kick into high gear in using it.

The functionality checklist

To ensure the investment in your new AMS will truly meet your association's requirements, talk with other departments about their needs and the limitations of your current association software. This will help you develop a list of must-have features and functionality. Then, ask your potential AMS vendors about your list, and make sure it's included in the baseline product.

Here are some important areas of functionality to consider as you narrow your list of AMS vendors.

1 **Member engagement**

A robust AMS can make all the difference when it comes to how well you engage with your members and how great their experiences are with your organization. Look for an AMS that gives you a comprehensive, 360-degree view of your membership, and is user-friendly for your team and your members. Make sure the AMS vendor has an understanding of your members' and association's needs when it comes to member engagement.

Ask them about their product's capabilities in the following areas:

- **Membership management**
  for creating an easy member sign up path including auto renewals

- **Customer relationship management (CRM)**
  for a 360-degree view of every constituent and transaction

- **Open application programming interface (API)**
  for integration with third-party solutions that allows you to share membership data between products for a more complete view of your members

- **Responsive user interface and portal**
  for a mobile and modern experience that meets and exceeds members' expectations

- **Event registration**
  to provide intuitive, personalized registration paths that, for example, display only relevant tickets and event sessions

- **Tracking of credentials and certifications**
  to allow members to easily track their continuing education credits and certifications

- **Email marketing and communications**
  for easily creating branded, targeted and engaging emails

- **Workflow automation**
  to automate manual tasks and help your staff members work more productively so they can spend more time serving your members

2

Configuration

It's important that the system you choose suits your staff needs and best serves your members. You may find that a platform with configurable modules meets your needs, or you may have a more sophisticated IT/developer staff that wants to configure or develop on its own.

Ask the AMS provider how the following could be configured to meet your organization's requirements:

- Event management
- Payments and dues collection
- Member portal
- Sponsorships
- Accounting

- eCommerce/online store
- Inventory management
- Education and certification
- Dashboards and reporting

Also, be sure to inquire about the client and professional services offered by the company from which you're purchasing. Does the vendor understand the association sector and know how to meet your unique needs? Will your software provider's client and professional services give you the help you need?

3

Integration

When shopping for an AMS, a key feature to examine is how much integration it allows with other applications. Look closely at your association's engagement, retention and revenue goals and existing technology to assess what integrations you might need or want to add in the future. Ask questions about what integrations the AMS can handle, and if the company has any strategic relationships or partnerships with businesses that might offer you a price break.

Ask the AMS provider about its approach to web services, and what options are available for the following types of integrations:

- RESTful web services or SOAP-based web services
- Single sign-on (SSO/SAML)
- Seamless data sync
- Websites
- Learning management system (LMS)

- Continuing education, credentialing and online learning
- Online communities
- Marketing automation
- Event management
- Accounting

4 Reporting

You need to use data to make informed decisions, and your AMS should help you do just that.

Ask the AMS vendor about the following reporting capabilities:

Dashboards
for tracking key membership trend data, including member growth and retention rates, member engagement scores and event registrations

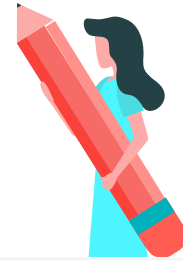**Advanced reporting**
for tracking the complete membership lifecycle, from non-member to retired member

Scheduled reports
for automatic report distribution via email on a daily, weekly or monthly basis to key stakeholders at your organization

The technology checklist

After documenting functionality requirements, your association is ready to evaluate technical requirements.

Here is a list of questions to ask and factors to consider when evaluating the technical aspects of your potential new AMS.

What to ask the AMS vendor	What to keep in mind
Explain the methodology you use to extend your system.	✓ Ask about the programming required and ability to add functionality. ✓ Ask for examples of simple, moderate and complex functionality that maps to your needs.
How long has your company been in business?	✓ Ask about the growth of the business and determine how their solution has evolve.
Does your company provide any training or user groups to enhance the use of the platform?	✓ Determine the level of initial training, along with ongoing education the vendor would provide. ✓ Ask if training manuals are provided and ask for an example. ✓ Ask if the trainers are dedicated to training or are a part of the implementation team.
After the system is up and running, what's it like working with the support team?	✓ Describe the service-level agreements. ✓ Describe the typical path from reporting an issue to resolving it. ✓ Where is the support staff located?
Explain the data migration process.	✓ Ask about the timing of a full migration. ✓ Determine how much support you'll have from the vendor. ✓ Ask if your users will be testing functionality on dummy data or your actual data.
Is there a single source of data or multiple systems with duplicate data?	✓ Determine if there are several systems with duplicate databases for your finance teams, membership teams, etc. ✓ Ask the vendor about its history of migrating data from multiple systems.
How long has your company been in business?	✓ Ask about the growth of the business and determine how their solution has evolve.
What solutions can your product sync with?	✓ Figure out if there are event modules, an e-commerce ability, etc. that your organization would require from the vendor. ✓ Ask about the vendor's ability to integrate with third-party systems, even custom-built systems. ✓ Ask the vendor to discuss its APIs to see if there are any functional or price limitations.
How flexible and configurable is your platform?	✓ Consider your organization's ability to tailor the platform to achieve your business goals & processes. ✓ The platform's ability to evolve to meet your business changes over time.

What to ask the AMS vendor	What to keep in mind
How difficult is it to make configurations in the platform?	✓ Determine if you are able to make these configurations on an as-needed basis or if you require support from the vendor. ✓ Ask if your organization's developers will use the same tools as the vendor or if they use a separate development tool from the vendor's team. ✓ Find out if you are able to make progressively sophisticated changes to the system while maintaining the same core principles. ✓ Will configurations be naturally preserved or will they need to be reapplied to the upgraded system? If the latter, how long does this process typically take?
How advanced is additional available functionality?	✓ If advanced functionality is available, it dramatically increases your agility and enables you to leverage an ecosystem built around your solution.
Who has full ownership of the system?	✓ Determine if the vendor or your organization will have total ownership of the data in the platform. ✓ Ask how often you will be able to receive a copy of your data.
Is your platform upgradable?	✓ Your organization needs the ability to take advantage of new features and improvements as business processes change and technology evolves over time. ✓ Upgrades to new features and functionality should be affordable and non-disruptive. ✓ New processes in the platform should fit seamlessly within your existing custom functionality without requiring you to port anything in the newer version. ✓ Ask the vendor for a price for an upgrade and see if they offer fixed-price upgrades.
Explain the upgrade path.	✓ Find out the typical time, effort and cost required with an upgrade. ✓ Determine if your organization has the ability to upgrade or if you'll need the vendor to do it. ✓ Ask how often new releases are issued, and see if there's a rhythm that fits well with your organization.
Who will own maintenance of and improvements to our system?	✓ Determine if your own team, a third-party service provider, or your system vendor will own this.
Can you provide examples of a fully configurable system?	✓ Ask to see new fields, tables, forms and validations. ✓ Have the vendor demonstrate how you would update a data view to display new data. The vendor should provide a typical workflow and demonstrate how to build and run it.
Where is your system hosted and how is my data protected?	✓ Ask how often data is backed up and, worst-case scenario, how much data would be lost. ✓ Ask for disaster-recovery plans.
Describe the team that will work with my team to install the system.	✓ What are the qualifications of each role, and what are the expectations of each role? ✓ How often will we review project status?
How do you handle any issues that come up during installation?	✓ Ask about a clear escalation process. ✓ Ask how scope is managed and clearly communicated. ✓ Ask if there's a regular check-in between your top-level executives and the vendor's top-level executives.

Building the business case
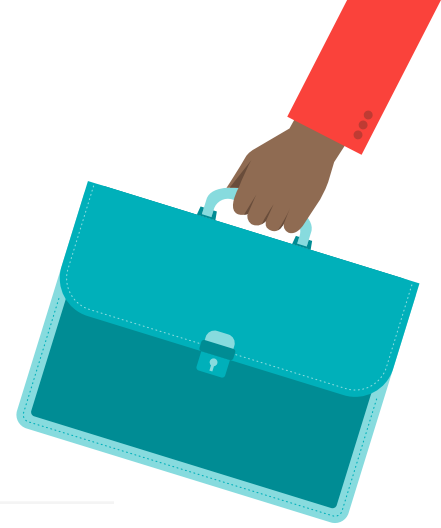
You've identified the need for a change, the limitations of your existing membership software platform and the functional and technical capabilities you're looking for in a new AMS. But not everyone at your organization understands the challenges with the existing platform, much less envisions the value that a new solution could provide. You need to persuade your organization to consider an upgrade.

Here are some tips for making your case in a manner that will get you the new AMS you need:

1

List the inefficiencies

Itemize the different ways your current system has been holding your organization back.

Inefficiencies generally can be found in three areas: technical, unnecessary time/effort and member services:

Technical
The role of IT in organization management is to build and maintain the system, not work in it every day. Are your coworkers inundating your IT team with tickets because of glitches in your current software? Do your coworkers have difficulty completing certain tasks without assistance from IT? Is the data in your system inaccurate or difficult to attain? Point out these inefficiencies.

Member services
If there are ways you could better serve your members but are unable to do so because of limitations in your membership software, your members are at risk of finding an organization that will better serve them. Create a list of things that your members have asked for, explicitly or implicitly, and determine what effort it would take to fulfill them with your current system— or if it's even possible.

Unnecessary time and effort
This type of inefficiency can have a huge impact on the overall productivity of your organization, if corrected. One way to surface these issues is to talk with each department about where they spend the majority of their time. For example, if you find that the account managers are doing a ton of manual data entry because they are handling event registrations manually, record that in this list. Replicate this approach for every department and you will come away with a sizeable list of opportunities to streamline processes throughout your organization

2 Demonstrate the research

If there are ways you could better serve your members but are unable to do so because of limitationsin your membership software, your members are at risk of finding an organization that will better serve them. Create a list of things that your members have asked for, explicitly or implicitly, and determine what effort it would take to fulfill them with your current system—or if it's even possible.

3 Explain the life expectancy of your current solution

Point out the following aspects concerning the life expectancy of your current membership software:

Technology
If your system is heavily reliant on a technology that is being sunsetted (discontinued), bring this up. Your executive team and board of directors don't necessarily keep up on technology trends and need to be informed.
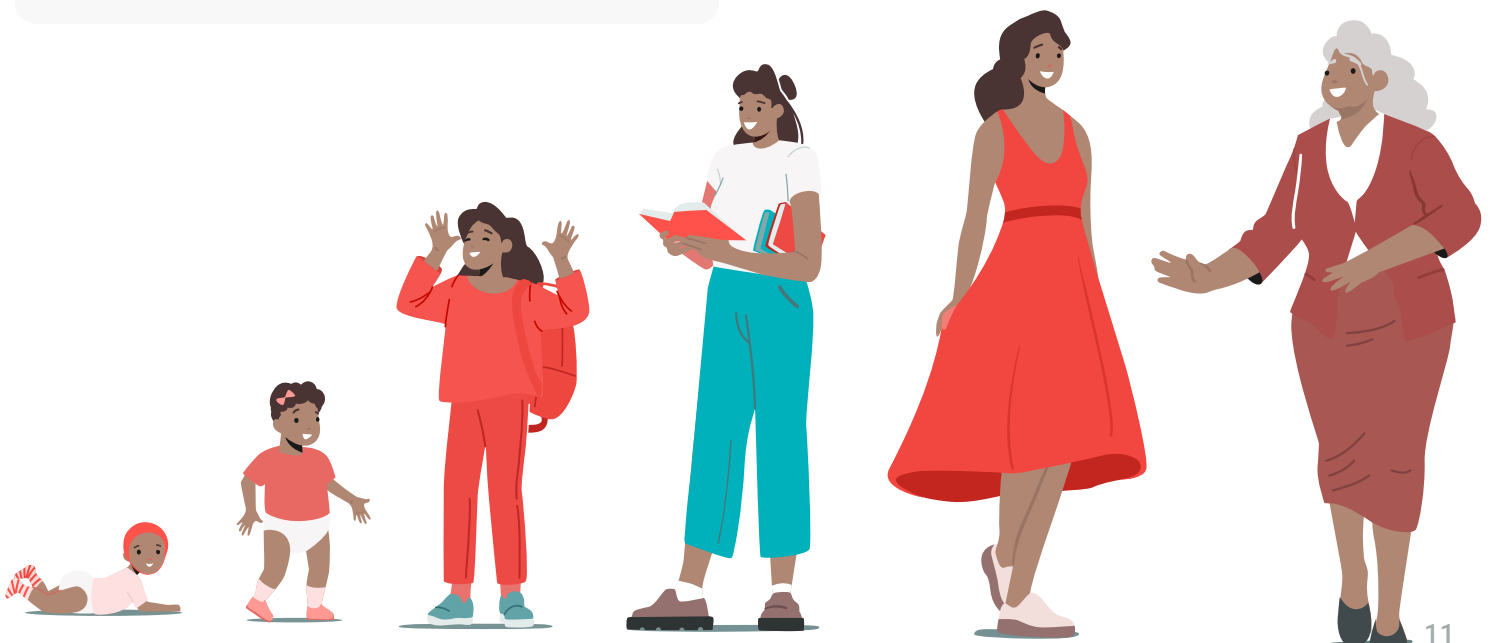
Members
Have any members threatened to leave if you don't fix certain issues or offer particular services? For all members who have voiced a concern, point out all of the others who have the same issue but remained silent as they shop around for another organization to join.

Cost
Quantify how much it's costing you to keep your current system in working order, beyond the standard license or subscription cost, to demonstrate how long you can afford to keep it. Also, if the cost to keep your system going for a few months is greater than the cost of an entirely new system, you have a really good reason to upgrade.

Presenting your case for an AMS upgrade in terms of life expectancy create a sense of urgency. A deadine gives people a psychological signal that something must be done, and that there are negative consequences (financial, member satisfaction, etc.) of allowing the problem to continue.

4 Define functional requirements in terms of team efficiency

By listing the limitations of your current membership software and talking with other departments about their needs, you should have a solid list of the features you'll need. Take some time to add context as to why those features are necessary.

Here are a few ideas of how to do this by adding columns in a spreadsheet:

Task
For each feature, assign which task it will help complete. Add details about how the task is currently being completed.

Department
State which department owns the task.

Requires additional resources?
Does the current workflow require the task owner to reach out to another department? Note that here.

Time to complete
Estimate the current time and effort to complete the task versus how long it will take with the new system.

Benefit to members
List the benefits your membership will receive.

By adding context to your wish list of features for the new membership software, you can prioritize your needs. If increasing efficiency is your most persuasive argument for upgrading, start with those features. If your executive team is more concerned with member satisfaction, start there.

5 Be prepared for the cost barrier

Remember that there will be an up-front cost to upgrading your membership software. And, cost is most often the cause for pushback from the executive team and board of directors.

The good news is that you've already laid the groundwork to focus the discussion on value. You already know how a new system will make your organization more efficient. Plus, you can point out the ways in which you'll be better serving your members.

But still, be prepared to hear phrases like "this isn't in the budget" or "this isn't the right time" during your presentation. Combat this type of thinking with your previous research and efficiency calculations to create the most compelling case for new software.

Four important ways to prepare for your data migration

Once you have approval and have selected a new AMS, it's time to make sure your organization is prepared for the migration of your data into your new AMS.

Data migration can be challenging. But, it also provides the opportunity for your organization to work across silos on a project that positions your organization to take better advantage of the data in your care.

Here are four important steps to prepare for your data migration:

1

Identify your data

Identify all of the sources containing data you will (or might) migrate to the new system. Besides your existing membership database, include systems or files containing member, customer, student and attendee data. Be sure to ask your colleagues about other databases they use. For example, they may be using their own methods to store data because your old system wasn't userfriendly enough for them, or because they didn't trust the accuracy of the data in your old system.

Next, decide how much data you want to migrate to the new system, where it's coming from and what state it's in. The complexity – and, therefore, the duration and cost – of data migration is determined by the amount of data, the number of data sources and the cleanliness of the data. The more data you have, the more time it will take for you and your team to review it, decide whether it stays or goes and get it cleaned up for migration. And, the more time it will take your software vendor or implementation partner to map that data to the new system, convert it and test it.

Note that the older the data, the more likely it's no longer accurate. It can be helpful to set rules about historical data (for example, keep only data from the last five years). Remember, the more data you plan to migrate, the more data you have to prepare, and the longer the membership software migration process becomes.

Financial data can be tricky during a data migration. The general rule: Migrate only open invoices and transactional data associated with funds still to be collected. Close as many open invoices as possible before migration. You can keep historical financial transactions available for viewing in archive tables.

2 Clean your data

The process of data cleansing ensures that only accurate and complete data is migrated to the new system. **Here's a brief plan for cleansing your data:**

- Determine the cleanliness of the data you will migrate – how accurate, complete and current is it?
- Delete or merge duplicate data.
- Purge old data.

- Clean up inaccurate or incomplete data, for example, bad email and mailing addresses.
- Fix poorly formatted data so it conforms to business rules.

This is a good opportunity to establish or revise your association's business rules for data management Decide and document how data will be formatted and entered into the new system from now on.

3 Make sure the new platform is configured properly

Your software vendor or consultant will talk about data mapping – the process of reviewing and comparing the data fields in your old database to the fields in your new database. They have to know exactly where each field in each table of your old system is going to end up in your new system – and make sure your new system is set up correctly for that data. Be prepared to have someone on your team work with your AMS vendor to ensure your data resides where you want it in the new system. This takes time and requires knowledge of the data's purpose.

4 Define your team's roles and responsibilities

Define your team's roles and responsibilities Be sure to understand who's responsible for each aspect of the data migration – your association's staff, the software vendor or a third-party implementation consultant. If you can, arrange for your software vendor or implementation consultant to do the heavy lifting; they'll know the new system well and have experience from working on many migration projects.

But your team isn't off the hook! You'll need:

- A cross-departmental team of system users and stakeholders to meet regularly with your software vendor to identify data, provide information about it and explain how you currently use that data in your business processes and workflows.
- A working group to oversee data governance and management.

- System users to help your software vendor with testing as they map data into the new system – and later when the system is nearing its go-live date.
- Select members to test the member-facing aspects of your new system.

Getting users involved early in system testing is a good way to gain their buy-in to the new system, espeically for those who are resistant to change.

Take the next step to AMS success

Choosing the right AMS can take your association to the next level and ensure success for years to come. The right solution can help you efficiently manage membership activities, strengthen engagement with members, and uncover data insights that improve decision-making and ultimately drive growth.

- Membership is more complex • Has a sophisticated IT/developer team that wants to configure or develop on its own
- Upgrading will be just as extensive and costly with current provider, so should look at all options

- Looking to improve the member experience through personalization on member portal and shopping experience
- Custom, unique needs
- Strict security requirements and prefer to host solution yourself

- Sophisticated processes and looking at how to automate them with workflows
- Needs endless integrations with other systems

Consider Aptify, an AMS by Community Brands that puts you in the driver's seat to make connections, make decisions, and make good on your promises to your members.

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