

The Essential Checklist for New Membership Management Software

How to find modern software to take your large membership-based organization into the future



Introduction

Does your association or labor union have the right membership management software to take your organization into the future? If not, then it might be time to look for new software.

Your large organization needs software that is powerful and comprehensive enough to support your complex needs today, yet flexible and scalable enough to adapt as your organization grows and evolves.

Having modern technology in place can also go a long way toward providing an exceptional member experience that drives greater loyalty. Research from Community Brands¹ shows that members who view their professional organization as an early adopter of technology are more satisfied and connected with the organization, more likely to renew, and more likely to promote the organization.

In this guide, you'll find an essential checklist and helpful tips to help you research membership management software and find the right solution to keep your organization going strong.



The essential checklist for your organization's next membership management software

As you research new membership management software for your organization, you will likely issue a request for proposals (RFP). An RFP is a document that can help you communicate your organization's needs, gather proposals from software vendors, and ultimately understand how well potential solutions meet your requirements.

One of the most important aspects of an RFP is your list of software requirements

As you build your requirements list, here is a checklist of vital capabilities to include:

✔ **Membership management**

Your organization is membership-based, so it's important to look for software that is a membership management solution at its core. Look for features that allow you to:

- Create an unlimited number of membership types and dues structures, including evergreen or lifetime memberships, as well as individual and organizational memberships.
- Create various pricing matrices to easily calculate membership dues, as well as set specific membership expiration dates for each membership type.
- Automatically generate renewal notices to make your renewal processes more efficient.
- Use advanced capabilities, such as member engagement scoring functionality, which allows you to automatically score members based on engagement metrics that you define, and then schedule automations and actions based on the scores.

✔ **Customer relationship management (CRM)**

CRM is critically important for membership-based organizations like yours. To keep pace with today's highly personalized online environment, you must be able to easily create and manage your organization's members and non-members as well as the employees and other constituencies you may need to track.

Look for membership management software with a relational database that allows you to see a 360-degree view of each person or company in the database. You should also be able to capture demographic data – whether entered through direct entry by staff or via an online portal by a member – so that you can engage with your members in meaningful ways.

✔ **Accounting**

Because accounting is a critical function within your organization, look for membership management software that handles core accounting activities, including orders, invoices, products, packages, and general ledger (GL). It should support batch accounting, with configurable batch accounting workflows, and the export of data to major third-party accounting software. The accounting functionality should also adhere to Generally Accepted Accounting Principles (GAAP) standards and be able to handle deferred revenue, tax tables, and proration tables, among other things.

✔ **Product and inventory management**

Another vital capability to look for is easy-to-use product and inventory management. You should be able to manage anything that your organization sells, including memberships, subscriptions, and event registrations. Make sure the software you're considering allows you to:

- Easily add attributes to products, such as specialized pricing tables, eligibility requirements, volume discounts, and renewal options.
- Track product availability in multiple warehouses.
- Handle backorders and inventory ledgers with ease.



✓ **Meetings and event management**

Your software should provide the tools needed to support the full lifecycle of events of various sizes, including seminars, conferences, and committee meetings. You should be able to:

- Plan and track floor plans, booth requirements, seating arrangements, and A/V equipment.
- Set up speaker assignments and registration for your events.
- Give members 24/7 online access to register and view event-related details.
- Manage housing and conduct analysis on events after they've occurred, so that you can look at year-over-year attendance rates, sponsor donations, etc., to evaluate results and better plan future events.

✓ **Business intelligence and analytics**

Look for software that allows you to view, report on, and interact with your data in real-time. You should be able to:

- See dynamic, actionable views of your data that allow you to drill down into each piece of data directly from the view.
- Easily export every view and report in the system to Microsoft Excel, Word, .CSV, and PDF.
- Automatically share any view or report, delivered on a set schedule to an email address(es), printer, or remote file location.
- Integrate with advanced, third-party business intelligence tools, such as Association Analytics and Tableau.



✔ **E-commerce/portal**

Your software should allow you to present an online portal to your members that allows them to easily:

- Browse products of any kind by category, name, or other attributes.
- See products based on their interests.
- Easily purchase products through a familiar online shopping cart experience.
- View order history and online payments.
- Access other information, such as committee information, polls and surveys, local and regional chapter information, professional education and certification programs, and more

✔ **Chapter and committee management**

Look for the ability to create chapters, define chapter positions, add members to those chapters, and generate automated chapter assignment rules. You should also be able to set up specific dues structures for chapters and display any chapter-related information on the web.

Also, look for the ability to designate committee types and terms, add members, track committee nominations, manage committee meetings, and provide online discussion forums.

✔ **Sales and opportunity management**

Make sure the software you're considering empowers your organization's sales team to close more deals through efficient opportunity tracking. Your management teams should have visibility into the sales process, thereby increasing predictability in revenue forecasting. Your software should allow your sales team to easily:

- Define and report against sales targets set by management.
- Track an opportunity's progress through the customer-defined stages of a pipeline.
- Deliver improved reporting on prospects, referrals, pipelines, and demand levels.

✔ **Case, grievance, and issue management**

To deliver excellent service and support for your members, it's important to efficiently handle cases, grievances, and issues – keeping processes moving forward and following their progress. Look for software that allows you to track the entire process cycle of issues, such as requests for service, support cases, and incoming complaints – through an integrated, workflow-oriented environment.

✔ **Subscription and publication management**

Your publications can be a valuable member benefit and a source of revenue. Make sure your software allows you to:

- Manage an unlimited number of publications and subscriptions, with the ability to sell them directly through agencies and online.
- Track delivery, process replacement requests, and set recurring delivery schedules.
- Integrate with your accounting functionality to ensure seamless order entry.

✔ **Marketing and campaign management**

Make sure your software allows you to create targeted marketing campaigns to maximize the exposure and potential of your organization's offerings. Look for the ability to target and identify audiences based on any specific filter criteria, and then use bulk e-mail capabilities to send personalized messages regarding product information, seminar reminders, event surveys, and more.



Other factors to consider for your next membership management software

In your search for software that can support your organization now and for years to come, here are some additional factors to consider:

✓ **Platform flexibility and configurability**

Your membership management software should be built on a flexible platform so that it can adapt and grow with you as your organization's needs evolve and as technology changes. Look for a platform that can be highly configured to meet your complex business needs, yet still allow you to stay on a product upgrade path.

✓ **Ease of use**

While your software should be powerful and comprehensive, it shouldn't be so complex that your non-technical staff can't use it. Look for software that allows your staff to easily run reports, create dashboards, and manage member data so that your staff doesn't need IT assistance just to manage processes and access the data they need each day.

✓ **Your organization's needs for international capabilities**

If your organization operates internationally, or if you plan to expand internationally, make sure your software is ready to support you. It should offer multi-currency and multi-language capabilities, Unicode characters, and multi-time zone support.



✔ **Support for customer success**

A successful move to new membership management software requires training and ongoing support. Make sure your software has a strong community of people and resources behind it to ensure your success during the software implementation and beyond.

✔ **Software vendor's history and reputation**

Your membership software is a foundational component of your technology ecosystem. The firm you select as your partner should be managed and staffed by people you trust. For example, look for a software vendor that shares your commitment to innovation and security. And make sure they have a long history of working successfully with large membership-based organizations.

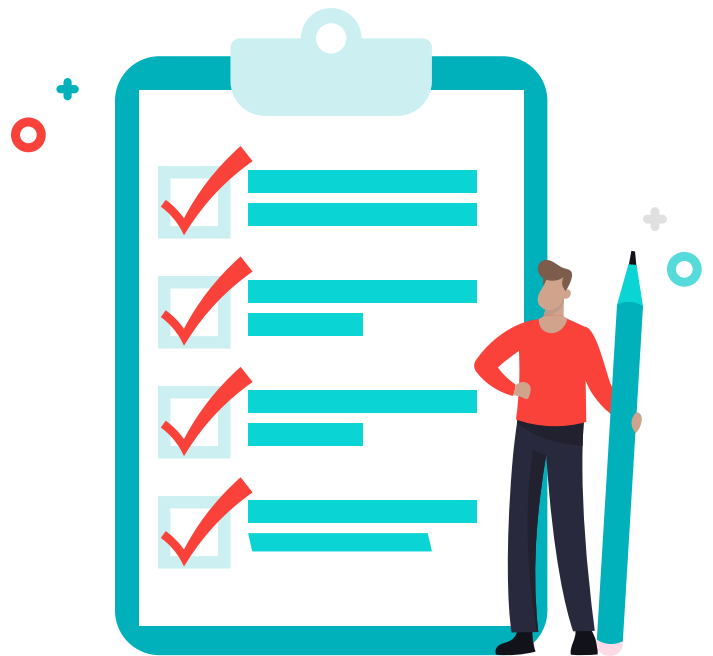
✔ **Customer satisfaction**

The software vendor's clients can tell you a lot about working with the company. Read the vendor's case studies and testimonials. Also, talk with the vendor's references, and ask your network of peers if they have experience working with the vendor.



Take the next step.

Choosing the right software can help your membership-based organization operate more efficiently and effectively today while becoming more prepared for the future.



Aptify by Community Brands is membership management software built on a scalable, flexible platform for large associations and unions. It's part of the Community Brands connected network of solutions for associations that includes job board software, learning management systems, and much more.

Learn more about why large, complex member-based organizations turn to Aptify as their membership management solution:



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