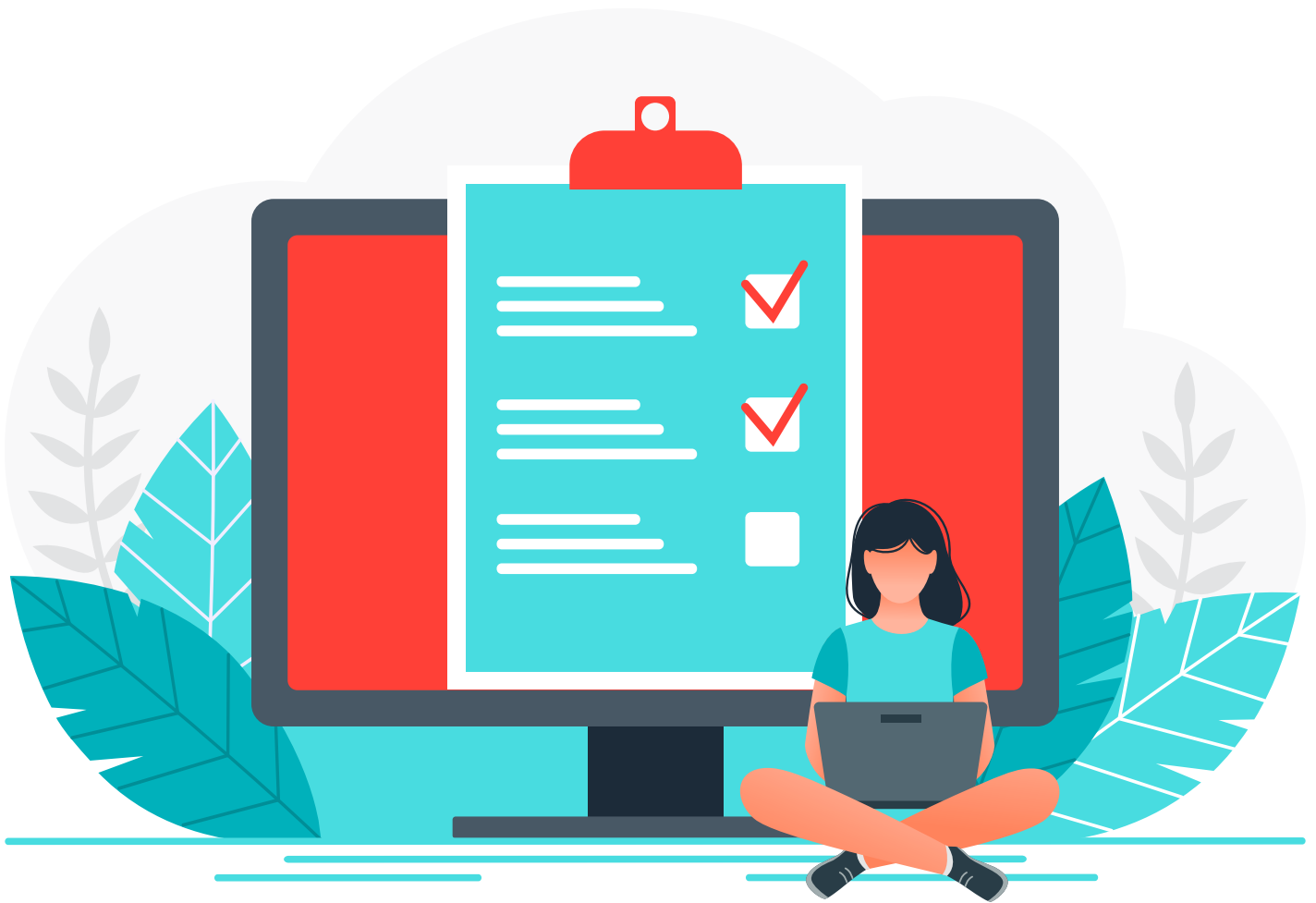


The IT Checklist for Evaluating Membership Management Software



Introduction

When it's time for new membership management software for your organization, you must closely evaluate the software vendors that make the final list. And as an IT professional, you'll naturally be the one your colleagues look to for guidance.

To make things easier, here's a handy checklist of factors to consider and questions to ask as you evaluate software vendors.

- 1 Software vendor's company history and reputation
- 2 Customer satisfaction and happiness
- 3 Platform flexibility and configurability
- 4 Implementation and migration process
- 5 Growth potential



1 Software vendor's company history and reputation

Your membership software is a foundational component of your technology ecosystem. The firm you select as your partner must be managed and staffed by people you like and trust.

Do you have compatible values and concerns?

Decide what's most important to your organization's culture in case these questions don't resonate with you:

- ✓ How innovative are you both when it comes to technology and related processes?
- ✓ How committed are you both to your staff's professional development?
- ✓ How purpose-driven are both your cultures?
- ✓ How serious are you both about cybersecurity and protecting data?

Do your due diligence on the company.

Be sure they'll stick around to support your technology and have the funds to invest in research and development.

- ✓ How long have they been in business?
- ✓ How financially stable are they?
- ✓ How deep and long-standing is their client base?

How experienced and knowledgeable are they about your organization?

Find a technology partner that understands membership-based operations, governance, lines of business, processes, membership models, revenue issues, and other critical challenges.

- ✓ How long have they been working with member-based organizations?
- ✓ What percentage of their client base are member-based organizations?
- ✓ Do they work with clients that share some of your organization's particular traits, such as size and complexity, company memberships, or chapter networks?
- ✓ Do they offer multiple solutions to support membership organizations?
- ✓ Do they belong to, participate in, and support ASAE, CSAE, and/or state SAE programs and events? How serious are you both about cybersecurity and protecting data?



TIP: For more than 25 years, Aptify has been a trusted provider of membership management software for large associations and unions.

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Customer satisfaction and happiness

The vendor's current clients can tell you a lot about working with the vendor.

Find out how other member-based organizations are using the software and if the software (and support) has met their expectations.

Just keep in mind that there are two sides to every story:

- ✓ Read the vendor's case studies and testimonials.
- ✓ Find out what past and current clients say on ReviewMyAMS. If something you read is concerning, ask the vendor about it.
- ✓ Ask your network of peers for stories about their experience with the vendor.

Talk to references.

A critical part of the due diligence process is talking to client references, clients the vendor lists as references as well as clients they don't list. Use the same list of questions for every vendor reference so that you can compare "apples to apples." Here is a sampling of questions to ask:

- ✓ Did your project stay on budget and on schedule? If not, why?
- ✓ How did the vendor work with other vendors on integration?
- ✓ How well did the vendor communicate during the project?
- ✓ How responsive are they?
- ✓ Describe the typical path from reporting an issue to resolving it.
- ✓ What are the vendor's strengths and weaknesses as a technology partner?
- ✓ Would you do it all over again with them? Why/why not?

We found only a few software options that could handle the complexity and scale we needed in a membership management system. There are many times that I've thought how glad I am that we chose Aptify.



Sara Steffens

Secretary-Treasurer,
Communications Workers of
America

3

Platform flexibility and configurability

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

Keep in mind the difference between configuration versus customization. Configuration enables you to change the behavior of the system without modifying the underlying core code. You can "plug in" new functionality and modules that enhance the system without changing it.

On the contrary, customization requires developers to rewrite the core code so they can change how the system functions—and that will add to your budget. Customization usually doesn't allow for a seamless and affordable upgrade path.

How configurable is the software?

- ✓ Does it have out-of-the-box applications and/or modules that meet your business needs; for example, event management, committee management, and inventory?
- ✓ Can you add your own functionality? What programming is required to do that?
- ✓ Can you make the configurations on an as-needed basis, or do they require support from the vendor?
- ✓ Will it allow you to run your most critical business processes?

Ask the vendor to demonstrate the extent of possible configuration:

- ✓ Examples of simple, moderate, and complex functionality that map to your needs
- ✓ Adding new fields, tables, forms, and validations
- ✓ Updating a data view
- ✓ Give the vendor a typical workflow and ask them to demonstrate how to build and run it.

Find out how the upgrade process affects configurations.

- ✓ How do your configurations get upgraded?
- ✓ Are they naturally preserved in the upgrade process, or do they need to be reapplied to the upgraded system?
- ✓ If they must be reapplied, how long does that process typically take?



TIP: Aptify is built on a platform that easily adapts to meet your needs today and in the future. It's highly configurable, so you can custom-brand member-facing portals, upgrade, and add modules without needing to re-build the core system.

4

Implementation and migration process

The implementation of your new system is a critical success factor for your project. It's important to avoid any missteps.

Ask vendors to walk your team through the discovery, data migration, implementation, and training processes.

See if you can get a sense of the extent of the guidance and support you'll receive from them.

- ✓ Do they speak in technical jargon, or do they use language your organization can understand?
- ✓ Do they anticipate your concerns and worries?
- ✓ Do they patiently answer all questions?

Ask them to explain their process for understanding your functional requirements and business processes.

- ✓ Do they have experience leading the discovery process with clients?
- ✓ Do they provide advice to clients about existing business processes?
- ✓ Who is responsible for what on both of your teams?
- ✓ Are they giving your team enough information about the work that lies ahead?
- ✓ What type of project timeline are they proposing?
- ✓ What are the vendor's strengths and weaknesses as a technology partner?
- ✓ Would you do it all over again with them? Why/why not?

Find out what you need to know about data migration.

A phase of the project that can take more time than anticipated by many organizations. The duration and cost of data migration is determined by multiple factors, including the amount of data you have, the number of data sources, and the cleanliness of your data.

- ✓ Ask when you should get started on data cleansing. (Hint: The answer should be, "Right away!")
- ✓ Discuss the data sets you plan to migrate: data sources, types of data, and how you use that data. To produce an accurate proposal, the vendor must understand the complexity of the data migration project.
- ✓ Ask the vendor about their history of migrating data from multiple systems.
- ✓ Ask for their advice on data migration: What should go and what should remain in archive or look-up tables.
- ✓ Ask if your staff will test functionality on dummy data or actual data. Do they patiently answer all questions?

Remember that your membership software is part of an ecosystem of software and vendor partners.

- ✓ Will their software interact and integrate with your existing systems?
- ✓ Have they integrated with these systems before?
- ✓ What about your custom-built systems?
- ✓ Ask the vendor to discuss their APIs and any functional or price considerations you should know about.

Find out about the vendor's implementation team.

- ✓ Who's on their implementation team and what are their roles?
- ✓ What are their qualifications and experience?
- ✓ What else will members of the implementation team be working on while involved with your implementation?

How will the project be managed from their end?

- ✓ Who is the vendor's project manager and what's their experience? (Make sure your organization has your own project manager to oversee progress on your end.)
- ✓ How is project scope managed and communicated?
- ✓ How often will you review project status?
- ✓ Is there a regular check-in between their executives and your executives?
- ✓ How are problems handled? What is the escalation process?

Find out about training during implementation and in the years ahead.

Training is a critical element of the implementation process, and it doesn't end when the system goes live.

- ✓ What type of training do you offer during implementation?
- ✓ What about ongoing training?
- ✓ Do you have training for different types of end users and different levels of experience?
- ✓ Is training onsite, virtual, or both?
- ✓ Do you offer training resources online?
- ✓ Do you have an online community for software users?
- ✓ Do you have a user conference?



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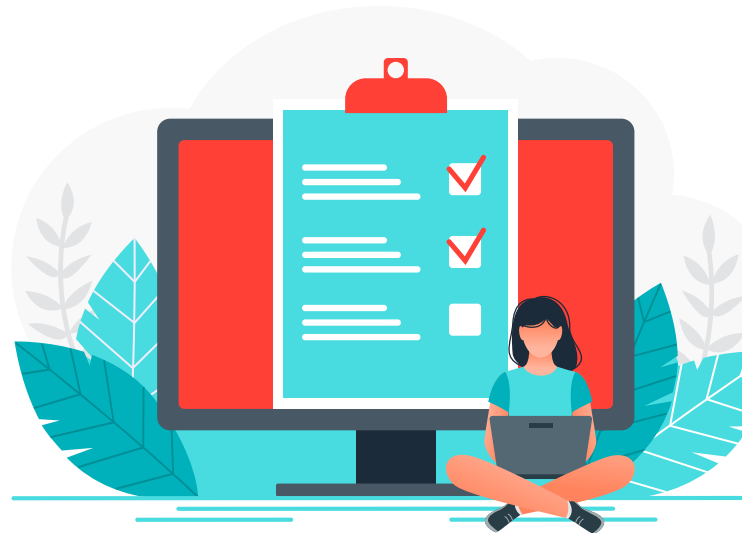
Growth potential

Your investment in membership management software is for the long haul. But the future isn't always certain. If your needs change in a few years, you shouldn't have to replace the software.

- ✓ Have you talked with the vendor about the future for your organization? Are they interested in how your needs might change?
- ✓ Does the vendor have a history of innovation? Do they invest in research and development?
- ✓ What does their product roadmap look like?
- ✓ How often is the software upgraded?
- ✓ How simple will it be to upgrade the software? What is the typical time, effort, and cost required? Do they offer fixed-price upgrades?
- ✓ Can you do upgrades yourself or does the vendor have to do it?

We hope this checklist will be helpful as you find your next membership management software.

Meanwhile, consider taking a look at Aptify by Community Brands. It's a membership management solution built on a scalable, flexible platform for large associations, international organizations, and unions. Aptify is part of the Community Brands connected network of solutions for associations, including job board software, learning management systems, and more.



Learn more about Aptify:

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