# The Ultimate Guide to Implementing Membership Software

Your playbook for getting started with a new system

Aptify®

# Introduction

Congratulations! You've decided your organization needs new membership software. You built a request for proposals (RFP), met with vendors, made a selection, got board approval, negotiated contracts, and probably went through countless other steps along the way. You've seen what your new software will be able to do, and you can't wait to get started.

But, wait. There are a few things you need to consider first.

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### Challenges and opportunities of software implementation

Software implementation is a time of work before you can reap the rewards of your new system. There can be long hours, conflicting ideas, and various obstacles along the way.

But the news isn't all bad. Change might be hard, but it can also be rewarding. This is also a time of opportunity.

Implementation allows you to review your processes and change what hasn't been working. It gives you permission to question priorities and to build a team that will lead your staff into new territory.

### Your ultimate guide to implementing membership software

This guide will help you take advantage of the opportunities the implementation phase presents. It will show you how to:

- keep your implementation on time and on budget
- build the right team and communicate with them so everyone stays on pace
- gain organizational buy-in throughout the experience
- understand the implementation timeline, so you have full insight into the process of what happens when

Let's get started...

# Staying on budget
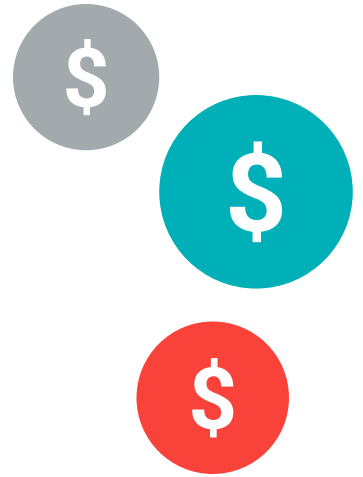
A new membership system is a major investment. Managing the costs of your new membership software extends well beyond the shopping and selection stages. As you enter the implementation phase, there are several strategies you can employ to make sure the project stays within budget and in scope.

## Be prepared for change

Successful implementation projects require time, patience, and flexibility. Rarely does the initial plan turn into a reality, as changes are often needed. It's essential to go into this process with realistic expectations. Doing so will help you tackle each phase of the project in a more productive manner.

The key to keeping your implementation within budget is to look to best practices. The more you can commit to following best practices, the more predictable and the lower your implementation costs will be.

Following best practices, though, is directly tied to being ready for change. Chances are, what you've always done in the past won't be the best way forward. After all, if you're looking to do what you've always done, can you really expect different results?

Be open to the idea of change when your implementation team suggests a best practice. Sometimes this might mean that you'll need to prompt those in senior management to accept something new; other times you might have to finesse a conversation with the board about changing policies and bylaws to adopt a new process.

Just remember: The result will be a system that best helps you achieve your organization's goals. There may be new paths to get there, but the outcome will be better — and less costly — in the end.

## Work in phases

Most mid-to-large organizations have complex needs, so when you set out to gather your requirements, the list can get very long, very quickly. The best way to tackle this while keeping costs down is to work in phases. For instance, plan to implement half of the full requirements in the first phase, then in the next quarter the second, and remainder in the third.

While this could be seen as more of a cost-delay than a cost-reduction model, it's not.

Here's why: Organizations that decide to implement in phases typically find that once they go live after phase one and get comfortable with working in their new system, their total requirements are actually reduced. This doesn't necessarily mean that everything will be taken care of in phase one, but you may see your list of original requirements start to shrink after go-live.

**TIP** This approach relates back to being prepared for change. Those organizations that are open to change will find that, with phase one fully implemented, new ways of doing things might eliminate the need for additional configurations that were originally planned.

And here are three more benefits of working in phases:

1. After phase one, you and your team will be familiar with the system, and you'll likely find that it's easier to move forward in a system that's already up and running.
2. Releasing incremental functionality after you're live will save more time and money than if you converted everything all at once.
3. You'll be able to stop paying maintenance fees to your outgoing vendor once you turn your new system on. A phased implementation will have you doing that much sooner.

## Avoid scope creep

We've all been there. It's halfway through a construction project and, while everything is ripped up and exposed, why not add another bathroom or redo the floors?

The same goes for membership software implementation. You might have been detailed in your requirements gathering, but once you get into the implementation, those seemingly "little" requests and add-ons start appearing.

Managing scope creep is one of the best ways to stay within budget. And the bulk of this management should take place right from the start. Spending time up front to stay on track, versus veering off on new things toward the middle or end of the project, will save a considerable amount in time and money.

To that end, talk with your vendor's implementation team about exactly what you want and need. Here's why:

- These discussions tend to reveal deeper requirements.
- The implementation team can bring to light the needs and best practices of similar clients.
- The team might be able to suggest a requirement you'll need for processes that will save you time and dollars in the future.

# Establishing the right team

Assembling a strong team for your software implementation will put your organization on a path for success and growth. The first step is to find the right people – those who understand (or will at least listen to) your concerns and who share your goal of getting things right. The implementation team consists of both your staff and vendor reps.

Here's what the team looks like:

## The internal team

When assembling your internal team, look for a broad representation from your organization, preferably at least one or two people from each department. Input from across the organization is essential, because each team and department has different needs, processes, and problems to be addressed.

Your internal team should include the following:

- **Executive sponsor** – The executive sponsor offers support, direction, and guidance to team members at all levels of the organization. This includes assisting with the change management strategy and rolling communication out to the greater organization. This person is the ultimate cheerleader for the project, advocating for continued support and commitment from within, as well as resolving any escalated issues.
- **Project manager** – Your internal project manager will work with the project manager on the vendor side to monitor and control budget, schedule, scope, and quality. This role is responsible for addressing resourcing issues and removing obstacles from the overall project, as well as ensuring key milestones are completed.
- **Subject matter experts –** Your subject matter experts are tasked with providing business process input in the early stages. They also author key documentation, provide data and functionality validation, and are key to making sure staff are properly onboarded in preparation for go-live.
- **Technical team** – The technical team provides the necessary infrastructure and administrative support, including data conversion assistance and testing.
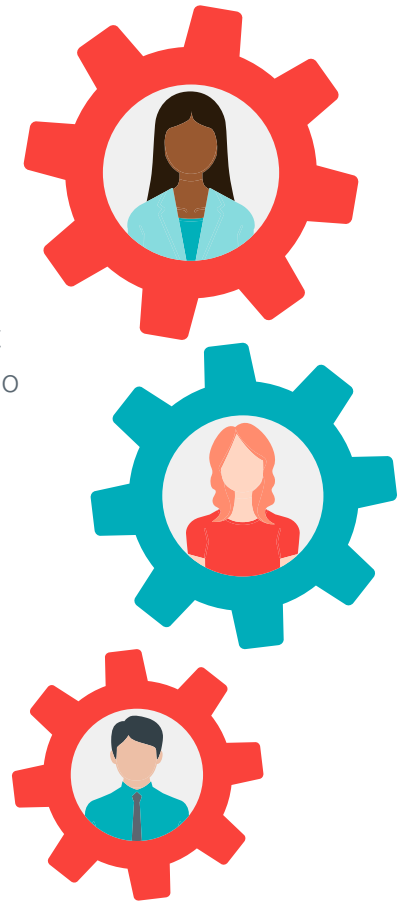
## Choosing an internal team lead

The internal team needs a leader who will be the "final say" when the team can't come to 100 percent agreement on issues. The team lead should:

- **Be familiar with processes** – Because the membership software will be used across the organization, it's important that the team lead have at least some understanding of the processes, procedures, challenges, and best practices of all departments that will be using the software.

- **Have authority** – Even if the person has the know-how, the team won't think they have the final say unless they have a position of authority. This might mean assigning a more suitable title to a great mid-level manager, or even turning to an executive-level managers. Just choose someone who others will listen to and follow.

- **Be knowledgeable** – It's important that your team lead understand three vital elements:
  1) the technology behind the software (to be able to identify and understand best practices and solutions), 2) the organization's business processes (to track the metrics the business side needs), and 3) the people (to facilitate buy-in, communicate go-live details, and set up onboarding).

- **Be dedicated** – Finally, the process of implementing membership software is lengthy. You need someone to head it up who has dedication to the issue so that they won't give in to fatigue or boredom, or simply toss up their hands if the going gets tough.

# The vendor team

When evaluating system providers, consider their experience level with implementations, especially ones that are similar to your organization's. Generally, if the providers have that experience, they're able to deliver faster and also provide you more realistic estimates.

Also, you can expect the vendor to probe you with questions about your processes, procedures, customers, data, and much more. You need to feel comfortable enough to trust them. If you don't, they will not be able to help you get the most out of your software.
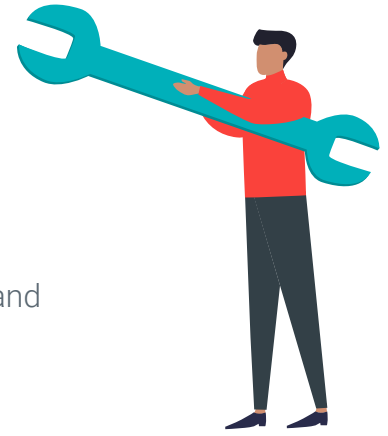
**TIP**

Exercise caution when dealing with software vendors that don't implement the software themselves or have control over the underlying platform. If they don't do the implementation, then sometimes it's difficult to determine which party should be held accountable if there are support or system issues. It's good to set those guidelines and expectations from the beginning.

Your vendor team might include:

- **Executive sponsor** – The vendor's executive sponsor is there to provide support and remove hurdles from the overall progress. This role is the vendor's counterpart to your internal executive sponsor.

- **Project manager** – This role operates much the same as the internal project manager does – monitoring and controlling the budget, schedule, scope, and quality. Additionally, this person should listen to your changing needs and make adjustments as necessary.

- **Solution architect** – This role leads the early stages of implementation, identifying the design and approach for the project and promoting industry best practices.

- **Business analyst** – This position examines and documents your business processes and requirements while acting as a liaison between the internal and vendor teams.

- **Lead technical consultant** – This role builds the technical design document based on specifications from the solutions architect and the business analyst. This person creates the effort estimates for work products and has overall responsibility for design, development, and deployment activities.

# An optional team: third-party implementer

With you and your team having to juggle your day-to-day jobs and the impending implementation process, it can be tempting to consider using a third-party implementation provider to assist you. If you opt to do this, be sure to do your research.

Make sure they follow best practices in the membership software industry regarding implementation practices and that they aren't endangering your upgrade path. The downside to having a third-party implementer is that they might not follow the software developer's toolkit and instead might do what they feel is best practices and what they are most familiar with.

However, depending on your organization's needs, it might make sense to work with a third party. They can provide you with structure for the implementation process and help you move things along. Just be sure to research your options thoroughly before you proceed.

**The Importance of Communication**
Whether you're dealing with people from inside your organization, those representing your software vendor, or a team from a third party, open communication and trust are essential to keeping the project running successfully. Being honest and keeping the lines of communication open will make the entire experience much more enjoyable and stress-free. And, who knows, if all goes well, you might even want to spend time with the group after go-live!

**TIP**

# Getting organizational buy-in

Some people think of change in a positive light: It comes along with the promise of a new beginning and a fresh start. But, change can also be hard.

Change management fosters acceptance for your new membership software and gets employees used to new work processes. It happens successfully when the fundamental need for change is realized, and that realization is then used as motivational drive to continue with the change. It also involves continual encouragement and support.

**Here are some helpful tips:**

## 1 Set expectations

No matter the number of demos, the length of your RFP, or the completeness of the functional requirement documents your subject matter experts compile with your consulting team, something will always come up. That doesn't mean everyone failed at project management, that's just the reality of having multiple people involved.

While it's impossible to expect the unexpected, you and your staff should be prepared for a degree of flexibility in the process. Things come up, changes are made, and people get nervous. It's best to face concerns head on and set the expectation that not everything will happen exactly as planned.

## 2 Be willing to identify & address doubts

When implementing any new software, you can always expect to meet some resistance from team members. It's completely normal. Over time, people get set in their ways, and when the time comes to change, there is that hesitation of disrupting their job.

Instead of disregarding their concerns, actively listen to them. Show them the ROI and how it will streamline processes, specifically ones that impact their roles. Show, don't tell. Sometimes all it takes is an actual demonstration of how much it will improve their job to open their minds to the idea.

**3** **Present the software to the users**

Vendor presentations are usually reserved for the software selection committee and perhaps a few high-level execs who need to sign off on the expenses. But, it's a good idea for the selected vendor to also present their solution to everyone.

This does several things: It shows your staff that you are transparent. It explains to them how the new membership management system will affect their daily work processes. And, it answers a lot of their questions, alleviating fears and gaining support for the new software.

Also, during the implementation, keep the team updated on what's happening. The more they are involved, the more comfortable they'll feel to ask questions, and hopefully in time, that will alleviate fears and give them a sense of optimism.

**4** **Maintain open communication**

During the software implementation process, it's important for all parties to clearly articulate their needs and ask as many questions as necessary. As you go, if something comes up that doesn't feel quite right or if something needs to be added, bring it to light immediately and make sure staff feels comfortable doing this as well. It's better to voice your concerns as soon as they arise than wait until the eleventh hour or, worse yet, not voice them at all.

**5** **Celebrate wins**

It's important to take the time to celebrate milestones along the way of the implementation, whether they're big or small. Incremental milestones are important in a long-term project, when that end goal can seem far away. Maybe you and your staff don't have the budget for blow-out parties at each step along the way, but some pizza, candy, or a late afternoon toast at the end of each implementation phase can go a long way toward easing everyone's stress levels and keeping the focus on small victories.

Along these same lines, determine internally which employees are the best to lead the change and the positivity. Having them be "change champions" can help generate buy-in from those who are struggling with the work and the changes.

**TIP** **The Importance of Communication**
Consider including the implementation in employees' job descriptions for the year the implementation takes place. That way, it's overwhelmingly clear that a successful go-live is everyone's responsibility and should be at the forefront of everyone's minds.

## 6 Keep the goal in mind

There's a reason you're making a software change and, most likely, that reason is because you're moving toward something better. If it starts to feel overwhelming, help your team focus on where you'll be after the project is completed. Your new system and what it will do to help you and your members will make it all worth it.

## 7 Maintain the skillset

To do things the "new and improved" way, you first must come up to speed on how to do them. Good training will allow you to do your job better, work more confidently, and onboard other teammates who can follow the new processes and procedures.

Everyone in the system is going to be doing something that helps run your organization. If staff members know how to use the system properly, then they can execute their job better. And you will realize a greater return on the investment in that system by having the people using the system the way it was intended.

# Understanding the process

So, you've budgeted correctly, your team is in place, and you have an entire staff energized about the new system and ready to celebrate. What's next? The actual implementation. This is where the rubber meets the road and the work begins.

# What to expect: time commitment

Every organization is different. Your specific schedule will be largely determined by the amount of data you'll be converting and the functional requirements produced in the initial phase. Implementation projects average about 11 to 12 months, but can last more than two years, depending on requirements.

Each phases requires different level of commitment from your team. Here's a quick breakdown of the typical amount of time you can expect to dedicate during each phase of the project:

- Design: 2–3 months
- Build: 4 months
- Validation: 3 months
- Deploy: 2 months
- Post-production: 2 months

Greater commitment is often needed during the initial and final phases. Throughout the project, expect your team to have the following commitment levels:

- Discovery and design: Medium to high commitment
- Build: Low commitment
- Validation: Medium commitment
- Deployment: Medium to high commitment
- Post-production: Low to medium commitment
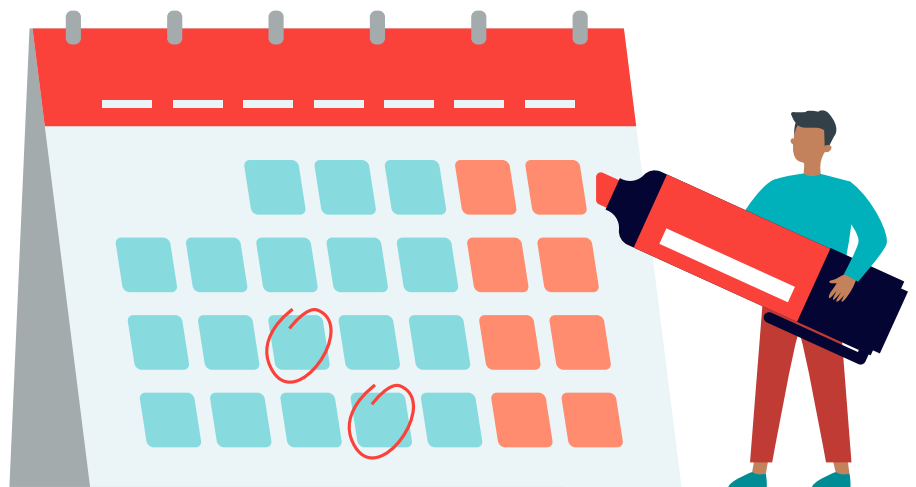
# Getting ready: data conversion

Typically, the most time-consuming task in an implementation project is the process of data conversion. It's also crucial to your implementation success.

To cut down on expenses, some organizations are tempted to tackle data conversion in-house, but this is a risky move. Even the most expert in-house IT department won't have the experience with the new system like your software vendor has. After all, the vendor team is made up of experts in the new system and can (and will) save time, frustration, and money in the long run when you turn the data migration process over to them.

That said, your IT team will be heavily involved. They're the experts in the current system and know the data intimately, so they absolutely need to be active in the process. But the ultimate responsibility for making sure data conversion happens and goes through successfully should fall to the vendor team working the implementation.

## The data conversion process

Data conversion starts as early as the sales process, where you'll start talking about the amount of data moving over and how to prepare for the process. You'll identify the data sources that you will need to convert to the new system, including data from existing membership management systems, spreadsheets, and any other systems of record.

Then data is mapped into the new system.

This is done through a lot of small iterations, where little bits of data are moved into the new system. This is also a good time to get users involved so they can start seeing the data in the new system and start testing it. This process helps with user buy-in to the new system and gives staff the opportunity to keep the teams updated if something is missing or if everything's migrating over correctly.

Once it's working, the next data set is pulled over. This occurs throughout the implementation, and the process can vary from running data conversion a dozen times to running it almost weekly over the course of a year. The data conversion process runs from start to finish. An organization will run data conversion one final time during go-live to ensure all data is up to date during the last weekend before the system fully launches.

The data you'll be converting often falls into three categories:

- Types and codes: Includes values in drop-downs and various codes in the system.
- Master data: Data such as people, companies, and employees that exists only once in the system; transactions are used repeatedly.
- Transactional data: Data describing business activity, such as orders and subscriptions.

**TIP**  Duplicate records or inconsistent data can cause issues during the conversion process, so data cleansing is a necessary step during data conversion. Be sure that you establish a data cleansing plan so that the data you enter after implementation is correct, complete, and not duplicated. Then, put steps into place to assure that the data remains accurate after the system is up and running.

# The end of the beginning

Even after the implementation phase is over, your team should continue the close relationship it's built with your vendor. Ask questions and seek solutions from support staff when needed.

Once you've reached the final stage, take some time to celebrate. Your team has worked hard to ensure the process goes smoothly. Plus, now that the implementation process is over, you can start enjoying the rewards of the new system, managing your organization from an intuitive, efficient platform, and focusing less on the system itself and more on serving your members.

The tips and best practices in this guide come from the knowledgeable team at Aptify. Aptify is a membership management solution built on a scalable, flexible platform for large associations, international organizations, and unions. It's part of the integrated software suite for associations by Community Brands that includes solutions for membership management, learning management, and career development. They work together to help you provide value throughout the member journey.

**Learn more about why Aptify AMS is the ideal solution for large, complex associations.**

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