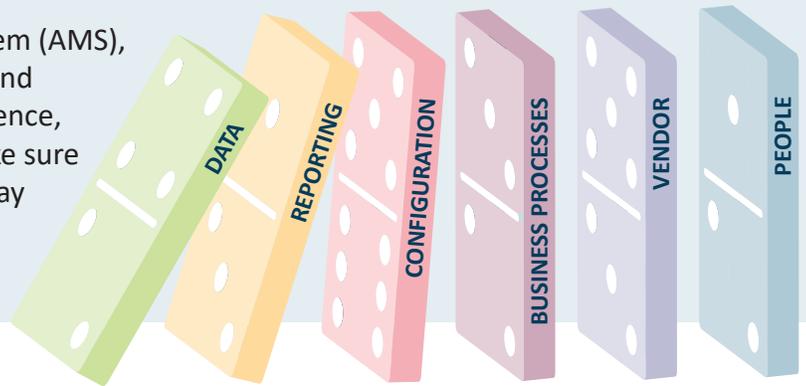


# AMS Selection Dominoes

You can stop the domino effect by looking at your project as a whole.

As you shop for an association management system (AMS), it's easy to get caught up in the system features and overlook crucial supporting factors. In our experience, these are the six areas that you can't ignore. Make sure you ask your vendor about each domino. They may seem small, but ignore one and you may knock down your implementation.



**DATA:** How will the vendor help you map, convert, and evaluate your data?



## MAPPING

How will the vendor help you map your data from your old system to the new system? At a minimum, staff will need a legend to understand the new table and field names so they can match data from the legacy system. Find out how much mapping will be done by the vendor and what your organization needs to do.



## CONVERSION

How will the vendor help you convert data? Data conversion involves much more than just moving data from one system to another, and it's not always clear who is responsible for conversion. Ask the vendor how they will help transform your data to fit in the new system.



## EVALUATION

Will the vendor help you evaluate your converted data to ensure it is accurate? Data quality assurance should help you validate that the quality of the data was maintained. Find out if the vendor provides tools or reports to identify errors or potential gaps. If they don't, what is your quality control plan?

**REPORTING:** Will the reporting options meet your needs?



## OPTIONS

Will the system's standard reports and dashboards meet your requirements? Create an inventory of the reports that your organization needs, then compare it to the system's basic capabilities.



## FLEXIBILITY

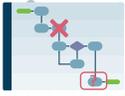
Can you adjust the standard reports? Once you know what comes with the system, find out how much flexibility you have to modify baseline queries and reports. Ask the vendor about options available to copy and modify data outputs (e.g., dashboard, reports, queries).



## SHARING

Will you be able to share reports effectively with your colleagues? Ask the vendor about options for team members to view custom dashboards, schedule queries, and subscribe to regular reports.

## CONFIGURATION: What will it take to make the system work for you?



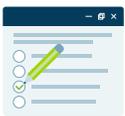
### ADAPTATION

How will your legacy data and processes translate into the new system? Ask the vendor to demo one of your most complex processes in their system. Can you live with their suggestions? For example, if the vendor takes a single form and turns it into a multi-step form with a workflow, are you able to adapt?



### ADOPTION

Will you have options to configure the system? Talk to the vendor about the limitations and boundaries on configuration. For example, can you change dues calculation rules or define a baseline group registration process? Within reason, you want to find a system that is user-friendly for both your staff and members without having to customize the platform to death. If you're concerned about a lack of configuration options, address it with your vendor sooner to avoid paying for customization later.



### CUSTOMIZATION

Can you customize the AMS without compromising the system's longevity? Most vendors and customers try to exhaust realistic configuration options before resorting to customizing the system, but sometimes it's necessary—and that's okay! In our experience, 99% of all implementations will require some level of fine tuning. However, if the vendor has strong objections to your approach to a complex activity, listen to them and work together to define a formal project to build the functionality.



### MEMBER EXPERIENCE

Are you including the member point of view as you configure the system? While most project goals include member experience or member engagement, many projects do not actually include direct member input. Consider including members in discovery discussions and mapping the customer journey or value stream to inform the configuration.

## BUSINESS PROCESSES: Are you prepared to change the way you work?



### FOLLOW THROUGH

How will you hold yourself accountable for changing your processes? Everyone has great ideas about changing business processes at the beginning of a selection, but resolve tends to degrade over time. Focus on creating clear, logical changes based on supporting data and feedback from members and staff. Demonstrate the value of the change and then reiterate that when you meet resistance.



### DECISION-MAKING

Have you documented your decision-making process? Associations that establish an internal change management process before project kickoff are often the most successful. This does not need to be a complex process; in fact, simplicity is key. Start by identifying who will make decisions and how.



### RISK MITIGATION

Have you considered the risk of failing to plan or adapt? Avoid unplanned cost and extended timelines by using your business processes and requirements as a guide while pursuing efficient solutions.

# AMS Selection Dominoes

You can stop the domino effect by looking at your project as a whole.

**VENDOR:** How will the vendor support your team before and after implementation?



## METHODOLOGY

How does the vendor design and deliver functionality? Whether they use an agile, iterative, or hybrid methodology, it's crucial that the process matches your culture. For example, while an iterative process will allow teams to focus on subsets of functionality, it will also require more discipline and trust.



## ISSUES

How will the vendor triage and resolve issues? The last thing you want is a parking lot full of neglected needs. Before you begin implementation, run through examples of potential problems with the vendor so you know what is in scope and how they will handle issues with the system.



## TRAINING

What will the vendor do to support user adoption? Staff training cannot be accomplished in a one-hour session. Training needs to be a long-term commitment that includes live sessions, one-on-one and group instruction, online support, and user communities. Ask your vendor about initial and ongoing training.

**PEOPLE:** Do you have the right resources to complete the project?



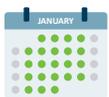
## SPONSORSHIP

Do you have strong support from leadership? Projects without executive support are doomed from the start. Choose a senior staff member to champion the project as an executive sponsor. They will act as the liaison between the executives and the project team.



## COMMUNICATION

How will you communicate with your staff and members throughout the project? The project manager should be responsible for setting the tone for communication. Establish regular check-ins with both staff and members to show progress and request feedback.



## TIME

Do you have enough time to devote to selecting and implementing an AMS? If you aren't prepared to dedicate a resource to manage the project, consider working with a consultant.



## MEMBER PARTICIPATION

Are you asking your members for feedback? If you want to improve the member experience, you need to understand how your business processes will impact them. Show them how customer-facing workflows will function in the new system, listen to their feedback, and adjust.

**Questions? Contact us.**

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