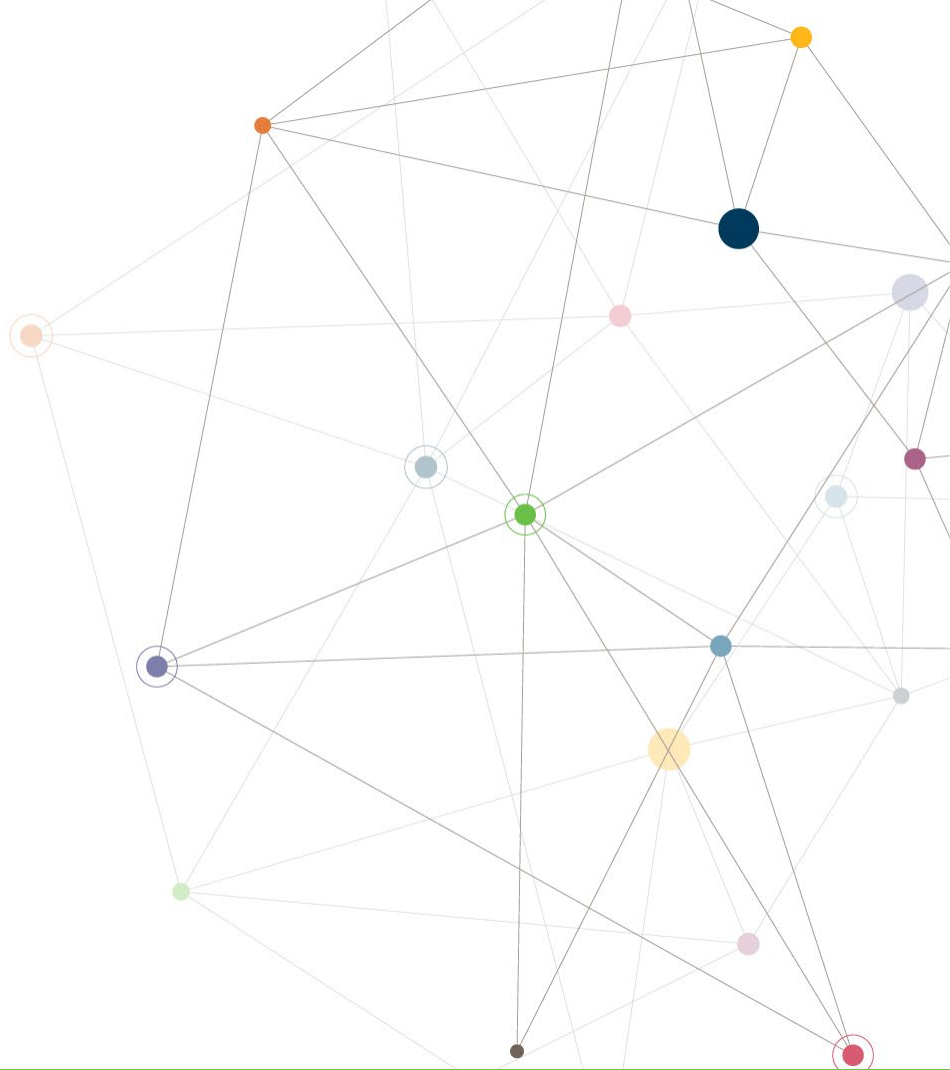# AMS BOOTCAMP
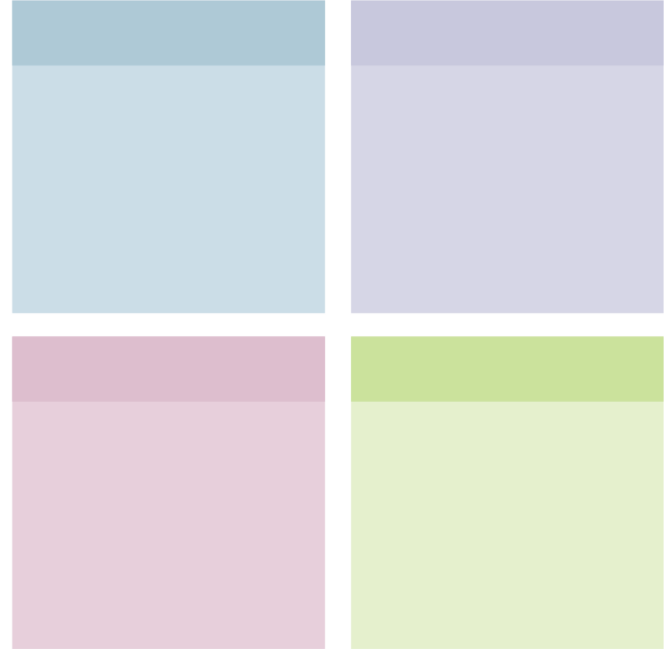
AMS Fest

Fall 2024

EXERCISE: OUR MAIN CONCERN IS…

WORD WALL (Post-Its)

What are your system concerns?

What are your vendor concerns?

I want to make sure we cover….

What is your confidence level?

INTRODUCTIONS: TECHNOLOGY GUIDES

Gretchen Steenstra
Kitten Fosterer

Kelly Gardner
Bumblebee Friend

DELCOR SNAPSHOT

DC OFFICE:
SILVER SPRING, MD

MIDWEST OFFICE:
CHICAGO, IL

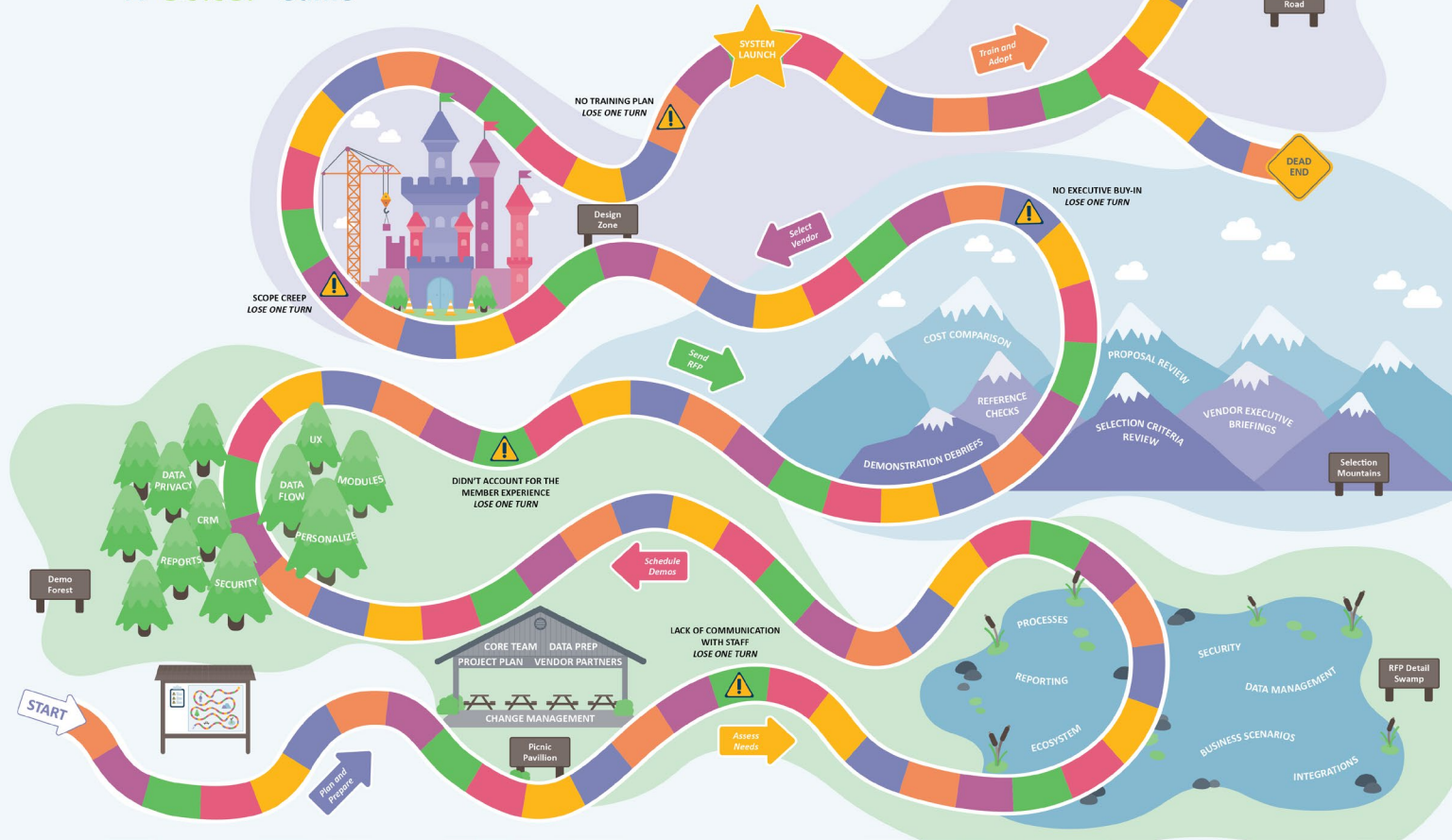| 501(C) COMMITMENT | 35+ YEARS IN BUSINESS | 90+ FULL-TIME STAFF | 40+ DIFFERENT CERTIFICATIONS | VENDOR-AGNOSTIC CONSULTING |

AMS ADVENTURE
A delcor Game

© DelCor Technology Solutions, Inc.

AGENDA

Manage the Change for People

- Establish a foundation for change

System Selection 101

- Warm Up

- Essential Selection Steps: What is critical vs. nice to have?

- Tools: Discuss and test tools to help develop the selection documents (charter, RFP, review, etc.)

- BREAK

System Selection Details

- Business Processes: What do you need to consider, define, and adjust NOW versus during the Implementation Phase?

- Requirements: Review several approaches to develop and share business requirements

- Selection Decisions: How do you evaluate RFPs, compare prices, and select a vendor?

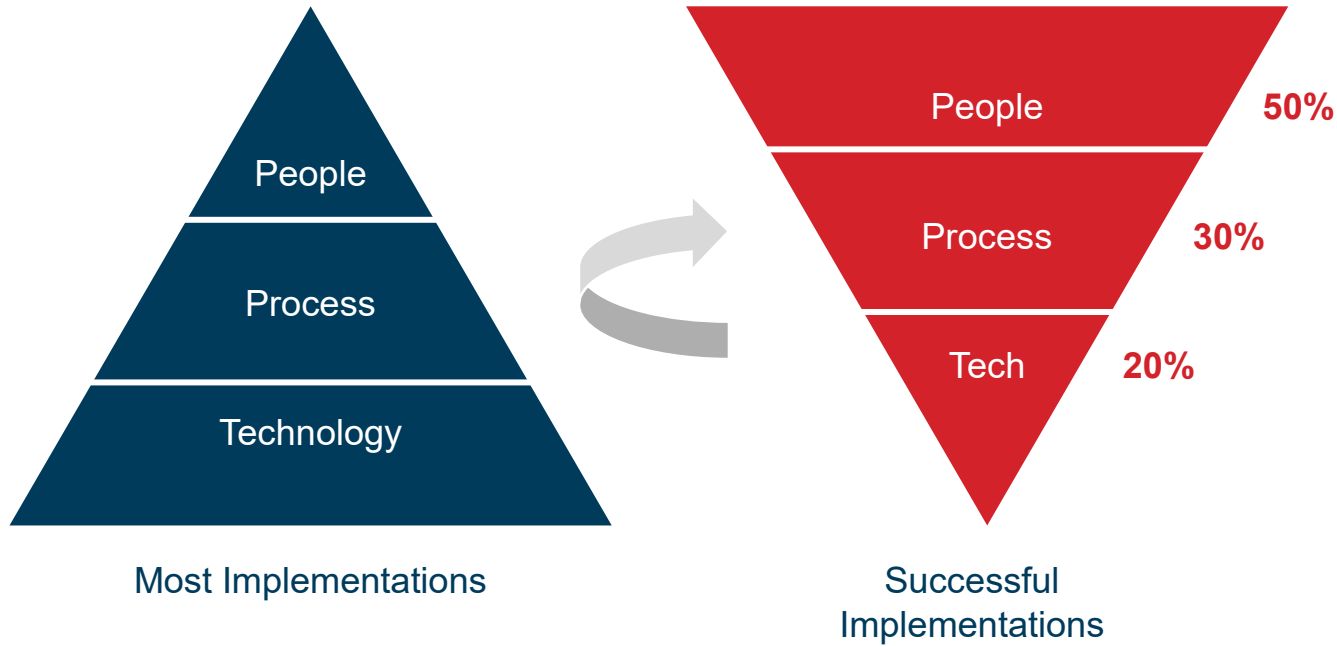- Contracts: What should associations consider to augment the legal review?

CHANGE MANAGEMENT

WHY DO BIG TECH IMPLEMENTATIONS FAIL?

Most Implementations

Successful Implementations

People 50%

Process 30%

Tech 20%

CHANGE MANAGEMENT: PEOPLE
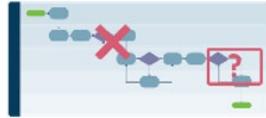
Change control is the decision to make a change, whereas change management refers to the aftermath of that decision. The fundamental elements of change management are key to a successful launch.

Engagement

Understanding

Preparation

Adoption

Reinforcement

CHANGE CONTROL VS. CHANGE MANAGEMENT

Change control is the decision to make a change, whereas change management refers to the aftermath of that decision.
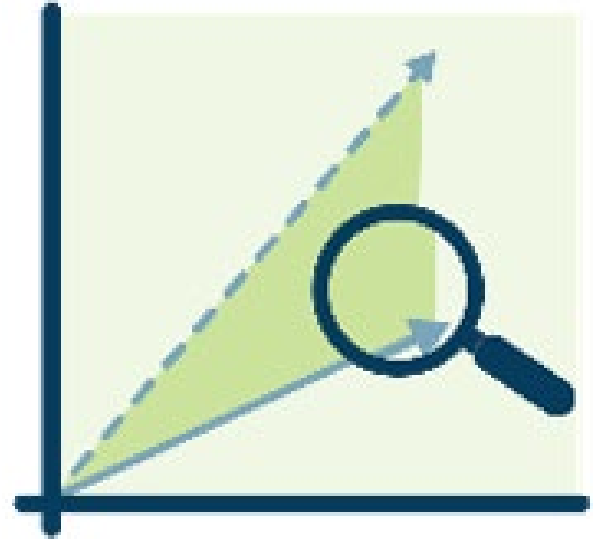
Change management = [change control] + communication + training + adoption

ADOPTION – START PLANNING

- **System Change -> Work Change**

- **Identify Major Changes now**

  - System

  - Staff Process

  - Member Expectations

- **Training**

  - What can you learn now?

AMS, CRM OR ??

AMS VS CRM

Function (Sample)	AMS	AMS/CRM Blend	Enterprise CRM + Apps
Customer Management	✓	✓	✓
Awards	✓	✓	Integrate with App
Chapters	✓	✓	Integrate with App
Committees	✓	✓	✓
E-Commerce	✓	✓	Integrate with App
Events	✓	✓	Integrate with App
Finance	✓	✓	Integrate with App
Membership	✓	✓	Advanced Config
Products	✓	✓	Integrate with App
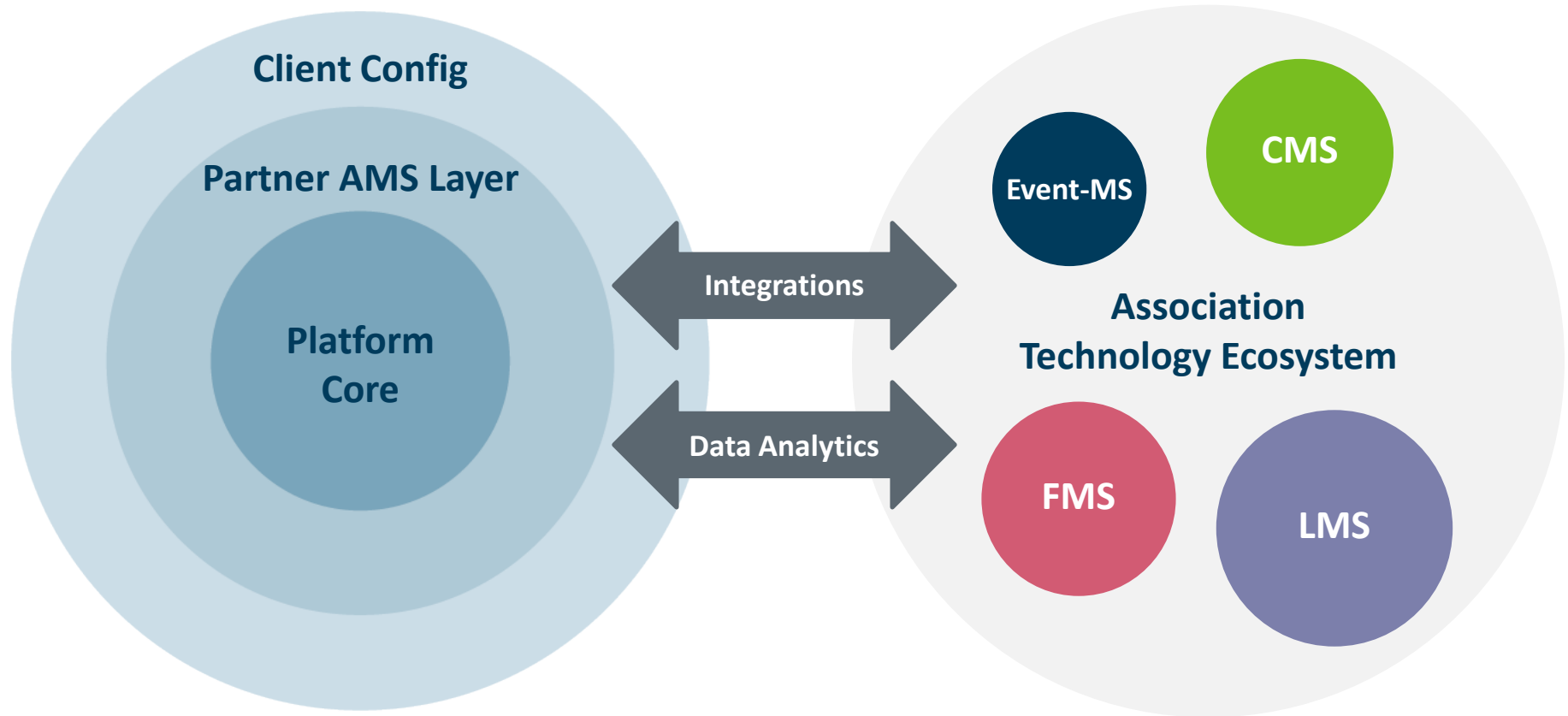
RISK: ALL IN 1 OR DIVERSIFY – MAKE A SLIDE OF PRO/CON

Major Functionality Missing from Demo

Simple Functionality Missing (Low Risk, Low Volume)

Required Functionality is Not Offered by the Vendor

STAY OR GO?
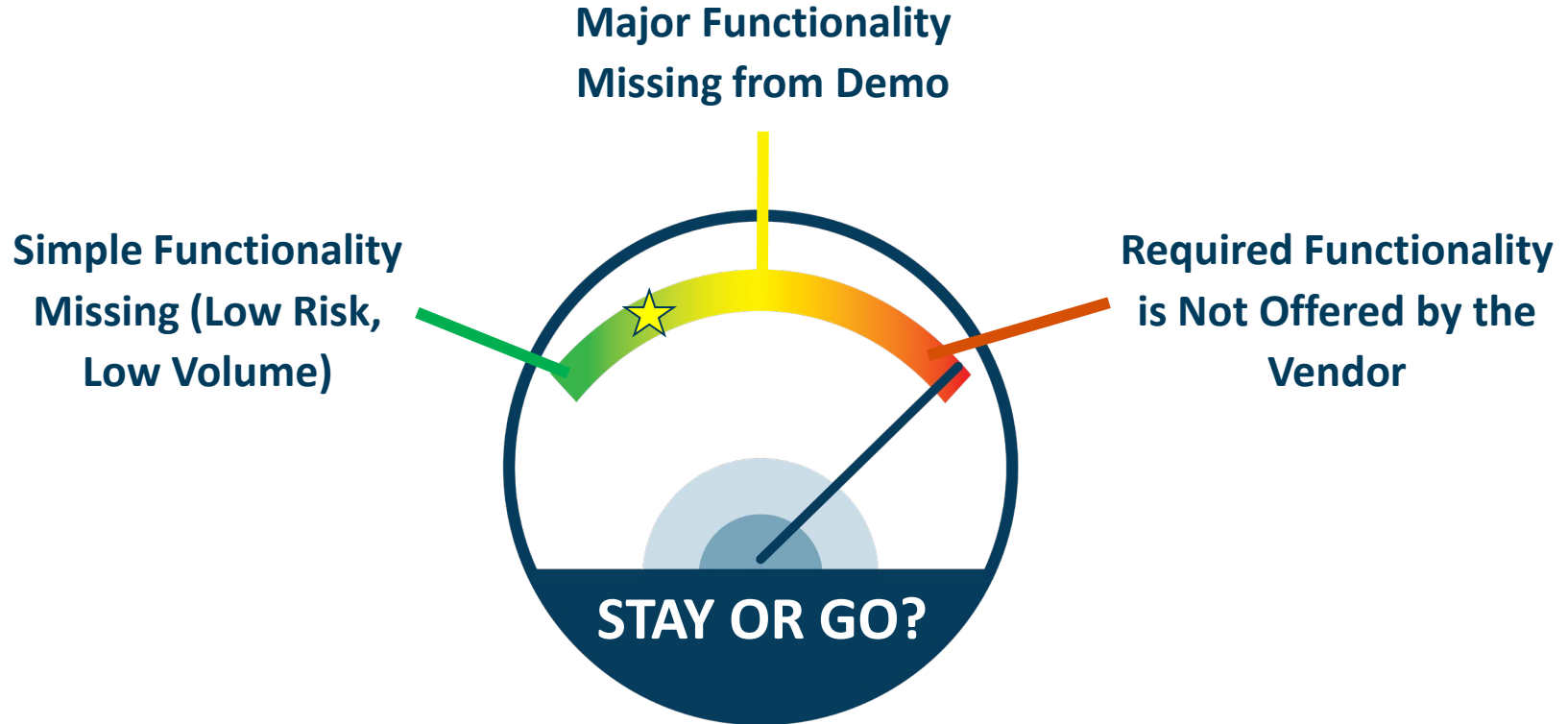
ECOSYSTEM: DRAW YOUR ECOSYSTEM (SCREEN BREAK)

Include if:

1. **Revenue**

2. **Member benefit (real one)**

3. **Support future growth**

OTHERWISE

-**Leave it behind** or integrate

YOU NEED THIS!

SAMPLE

Future State Ecosystem Diagram
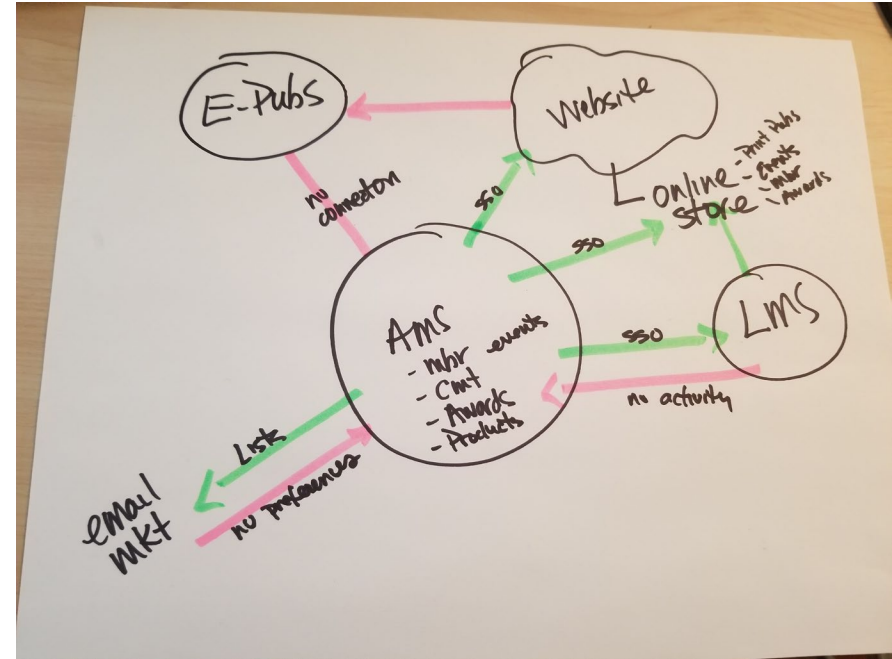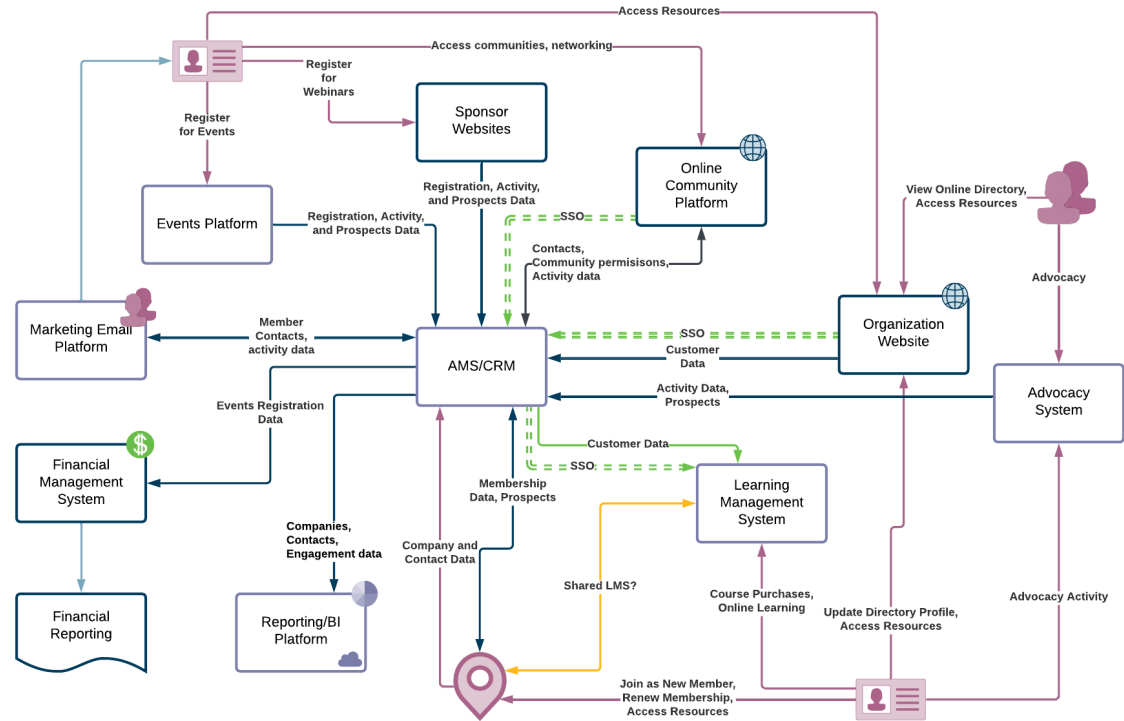
AMS ADVENTURE
A delcor Game

START

Plan and Prepare

Picnic Pavilion

CORE TEAM | DATA PREP
PROJECT PLAN | VENDOR PARTNERS
CHANGE MANAGEMENT

Demo Forest

DATA PRIVACY
CRM
REPORTS
SECURITY
UX
DATA FLOW
MODULES
PERSONALIZE

DIDN'T ACCOUNT FOR THE MEMBER EXPERIENCE
LOSE ONE TURN

LACK OF COMMUNICATION WITH STAFF
LOSE ONE TURN

Assess Needs

Schedule Demos

PROCESSES
REPORTING
ECOSYSTEM
SECURITY
DATA MANAGEMENT
BUSINESS SCENARIOS
INTEGRATIONS

RFP Detail Swamp

Send RFP

COST COMPARISON
REFERENCE CHECKS
DEMONSTRATION DEBRIEFS
PROPOSAL REVIEW
SELECTION CRITERIA REVIEW
VENDOR EXECUTIVE BRIEFINGS

Selection Mountains

Select Vendor

Design Zone

SCOPE CREEP
LOSE ONE TURN

NO EXECUTIVE BUY-IN
LOSE ONE TURN

NO TRAINING PLAN
LOSE ONE TURN

SYSTEM LAUNCH

Train and Adopt

DEAD END

Adoption Road

POLL

How long should the selection take?

a) 1-3 months

b) 3-6 months

c) 6-9 months

d) 12+ months

SYSTEM SELECTION PHASES

Kickoff Meeting

Charter

RFP

Demo

Decision Process

Make a Decision
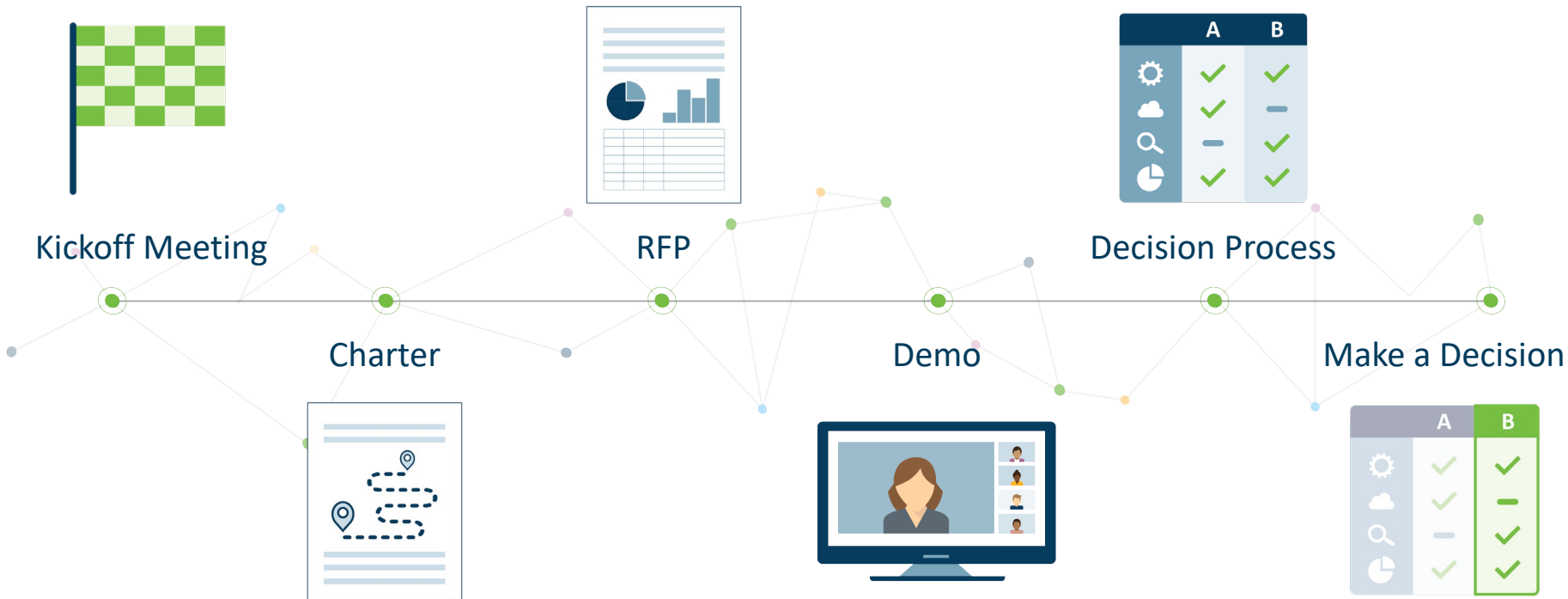
CORE TEAM - SELECTION

How many people should be on your core team? Do you have the following?

- Decision Maker

- Business Owners

- Finance

- Marketing/Communication

- Customer Service

ROLES AND RESOURCES

- Identify staff roles

- What resources will be needed?

  - Time needed

  - Duration

  - Communication

  - Change Managment

- Staff roles

  - Backfill position

  - Longer hours

  - Temp

ENGAGEMENT – CHANGE LEADER ON THE CORE TEAM

- **Who?**

  - Who is looking out for major changes that will impact staff, members?

- **What?**

  - Is this a staff responsibility, vendor, partner?

- **How?**

  - Communication, Training, Education

SELECTION TIME COMMITMENT

Phase	Timeframe	CLIENT Staff Task	Staff Time Commitment	
			Core Team	Stakeholders
I: Selection Planning and Initiation	4-5 weeks	Prepare Background Information for Review	2 hours	
		Participate in Initial Meeting	2 hours	
		Participate in Project Kickoff Meeting	1 hour	1 hour
II: Discovery and RFP Development	4-5 weeks	Participate in Discovery Meetings	1-2 hours per relevant session	1-2 hours per relevant session
		Participate in Meeting to Discuss Vendors	1 hour	
		Participate in Demonstrations (3)	24 hours	12-16 hours
		Participate in Demonstration Debriefs	3 hours	Optional
IV: Vendor Selection	4-5 weeks	Participate in Discussion to Identify Finalists	1 hour	
		Review Proposals (2)	2 hours min.	
		Participate in Final Vendor Selection Discussions	4 hours	
V: Contract Negotiations	3-4 weeks	Participate in Contract Negotiations	TBD	
VI: Implementation Planning and Initiation	TBD	Review Implementation Transition Plan	1 hour	
		Participate in Vendor Discovery Preparation	4-8 hours	
		Attend Vendor Discovery Meetings	TBD	
VII: Implementation Project Management	TBD	Participate in System Implementation with Vendor	TBD	TBD

ROLES AND RESOURCES – IMPLEMENTATION – PLAN AHEAD

Implementation Resource Commitment
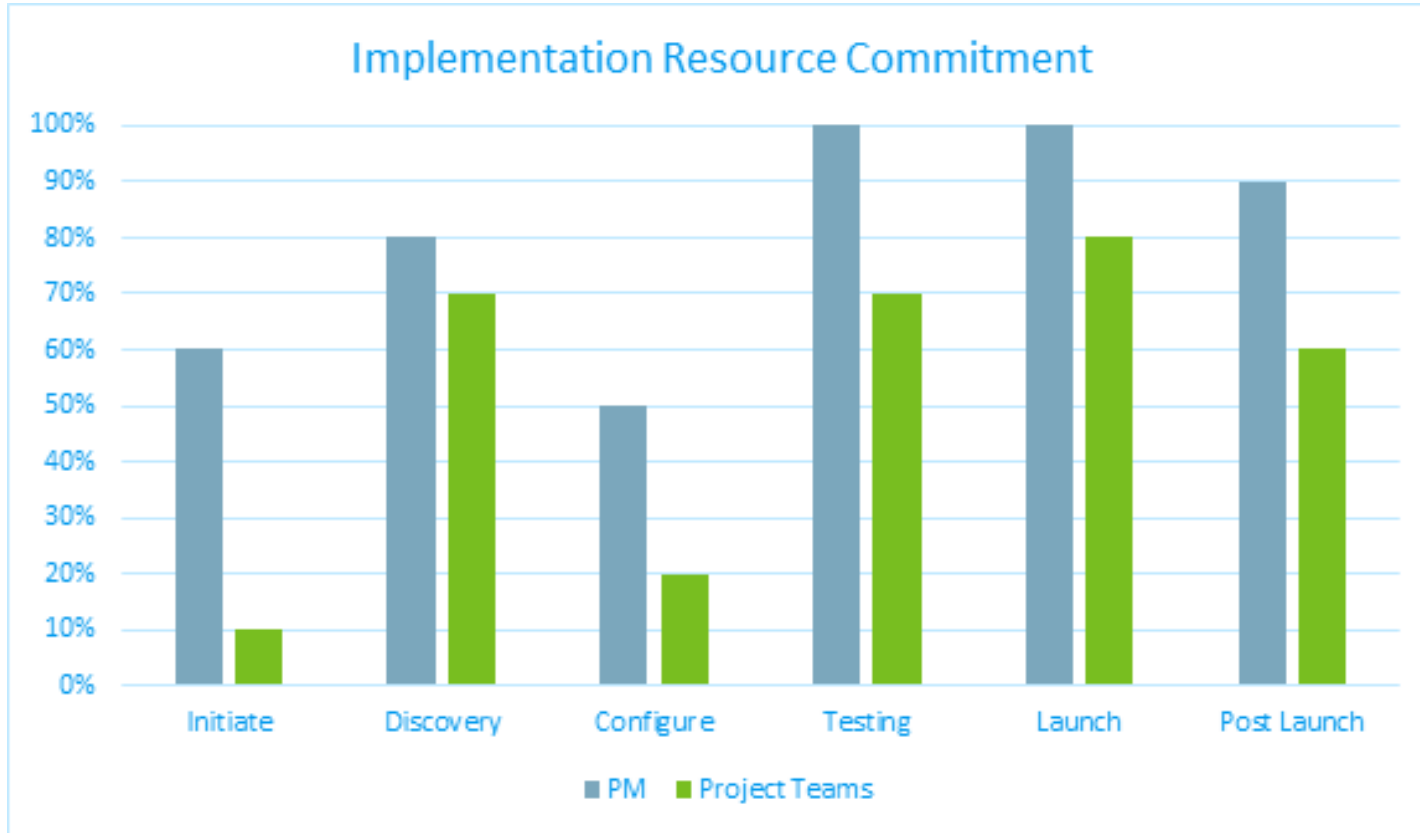
LACK OF COMMUNICATION

Lose a turn!

COMMUNICATION: PLAN AND IDENTIFY TOOLS

- Same info as a new product launch

  - Who, what, where, why, when

- Collaboration – what tools are being used?

  - Chat

  - Official information (e.g., requirements, decisions)

  - Updates/Status Reports

COMMUNICATION: INTERNAL AND EXTERNAL

- Internal

  - Updates of milestones and progress

  - Project Team, Staff, Leadership/Board

- External

  - Updates to leaders and members

  - Keep Vendor Partners informed

  - 'Coming soon – new registration process'

  - Ask members to provide feedback

PROJECT CHARTER

5 W's (Who, What, Where, When, Why)

Why are you starting to look?

Why now?

What is your pitch?

If you can't state your goal right now, you may not be ready

Association focus on WHAT and WHY

Vendor focus on HOW?

DISCOVERY TRAILHEAD

SECTION BREAK: RFP SWAMP

WHY A REQUEST FOR PROPOSAL (RFP)?

Use the RFP to organize your needs and state your goals.

- Focus on your business needs

- Align association goals and business functions

- Refresh and improve processes

- CLARITY (check the box)

- Same info from each vendor

WHERE DO YOU FIND REQUIREMENTS?

Standard Operating Procedures (SOP)

Tribal Knowledge

Organizational Goals
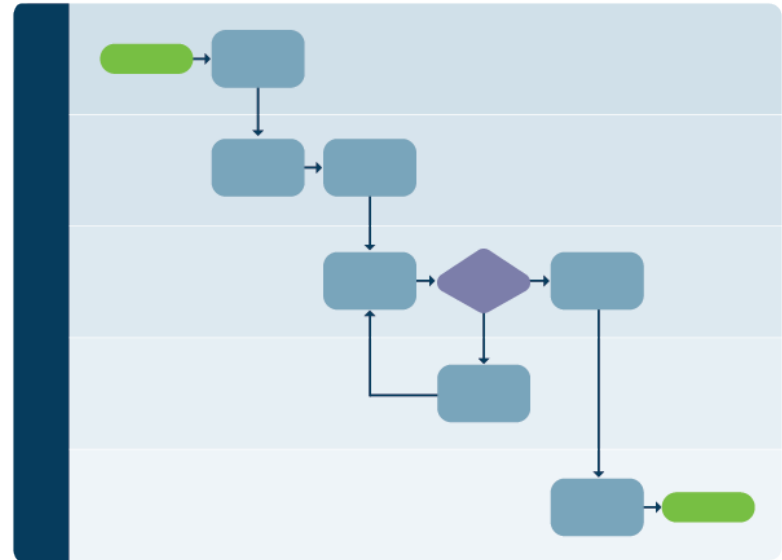
Member/Customer Needs and Processes

Staff Needs and Processes

BUSINESS processes

VS

business PROCESSES

TELL YOUR STORY

Find the best way to tell your story

Break it down into requirements – focus on what vs how

Functional Requirements (System Behaviors)

Non-Functional Requirements (System Performance)

COMPLETE

CONCISE

RELEVANT

SPECIFIC

TESTABLE

TRACEABLE

VERIFIABLE

CREATE A USER STORY

User stories:

- Are a way to simplify requirements.

- Expose the detailed requirements.

- Highlight the business reason for each functionality.

- Are testable.

As a...	I want to...	So that...	Acceptance Criteria
Member	Renew Online	I can pay immediately with my credit card	

DATA: REQUIREMENTS

What are you REALLY doing with your data?
What is the relationship between data and process?

- Data conversion

- Report inventory

- Data standards

- Data integration

REVIEW YOUR REQUIREMENT

- Is it comparable?

- Is it scorable?

- Is it a single requirement/single answer (baseline Y or N)?

- Can a stranger understand it?

- Do you need to add context? Vendors don't know all the facts about your 'special' process.

IDENTIFY AREAS OF POTENTIAL CHANGE

Use the selection process to identify business processes that may need to change

Difficult requirements

Areas that require customization

Processes that need the most customer service/TLC

Processes that support the most revenue

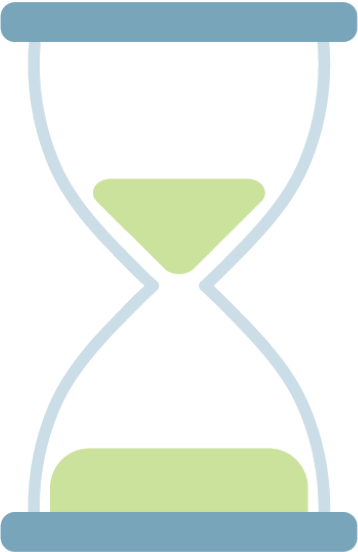Processes that can be automated

REQUIREMENTS: TELL YOUR NEIGHBOR

- Can you explain your business rule to a stranger?

- What is your business OUTCOME?

- What are the exceptions for small groups or individuals?

- Is it written for the legacy system?

10 MIN...GO!

RFP ARE A GUIDE FOR VENDORS

1. Clear Business Goals

2. Revenue-driving functionality – add details!

3. Unique configuration or custom apps that need to be replaced

4. Scope for initial project

5. Tolerance for future deliveries and smaller projects

PULL IT TOGETHER TO BUILD THE RFP

Why do I need an RFP? Can't I just ask for a proposal???
Checklist:

o   Introduce the project

o   Background of your organization

o   Project goals and scope

o   Business objectives

o   Overview of functional areas

o   **Ecosystem Current and Future**

o   Specific questions and needs (e.g., requirement)

o   Instructions to vendors

RFP: ADD ECOSYSTEM DIAGRAMS – FOCUS ON THE FUTURE

SAMPLE

Future State Ecosystem Diagram
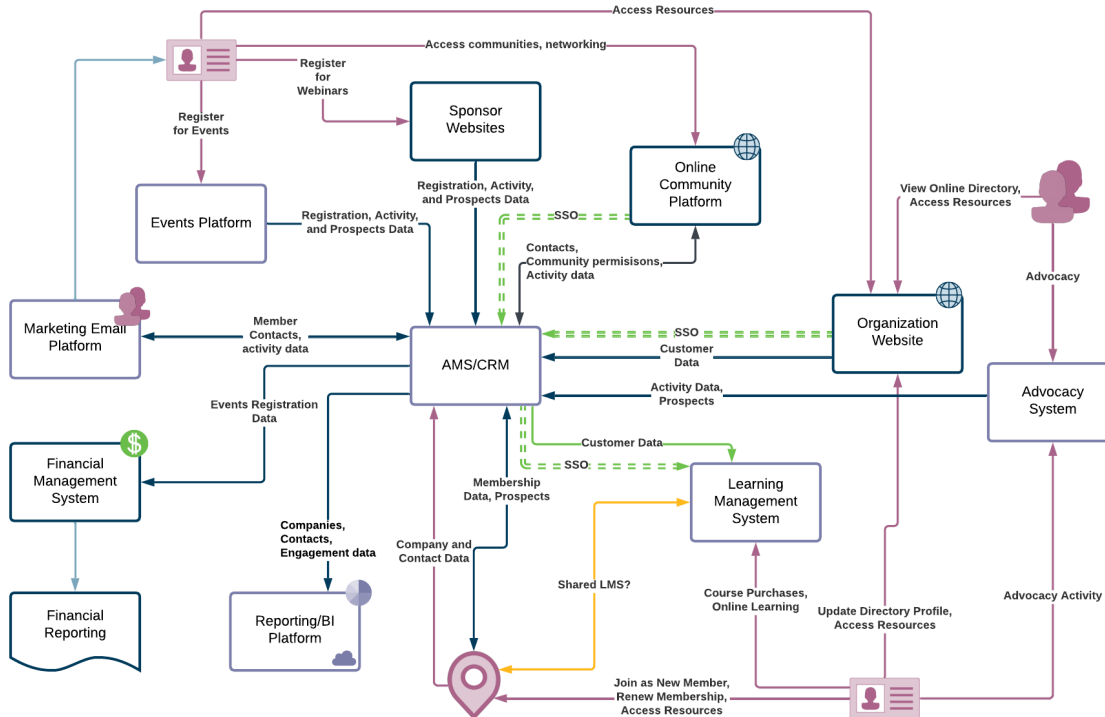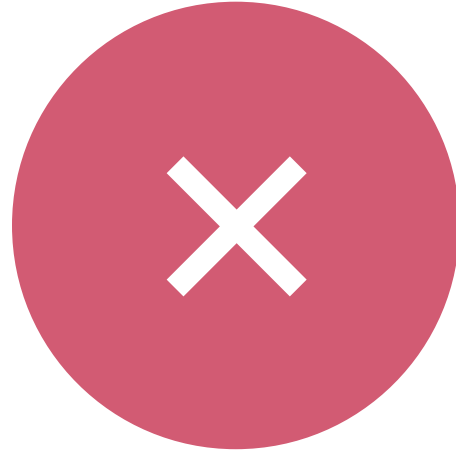
TRUE   FALSE

POLL

How many vendors should I consider?

a) 8

b) 2

c) 5

d) 3

e) All of the above (18)

VENDORS: TALK TO THEM!

Tell vendors what you need and then make them prove they can do it!

- Be honest

- Provide an overview of your association

- Discuss current AND future needs

- Share general budget range

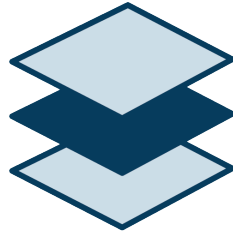- Share staff size and resources

- Use your RFP as a guide

SELECTION CRITERIA: HIGHLIGHTS

Functional Requirements

Customer-Facing
e-Commerce
Exports

Platform and Services
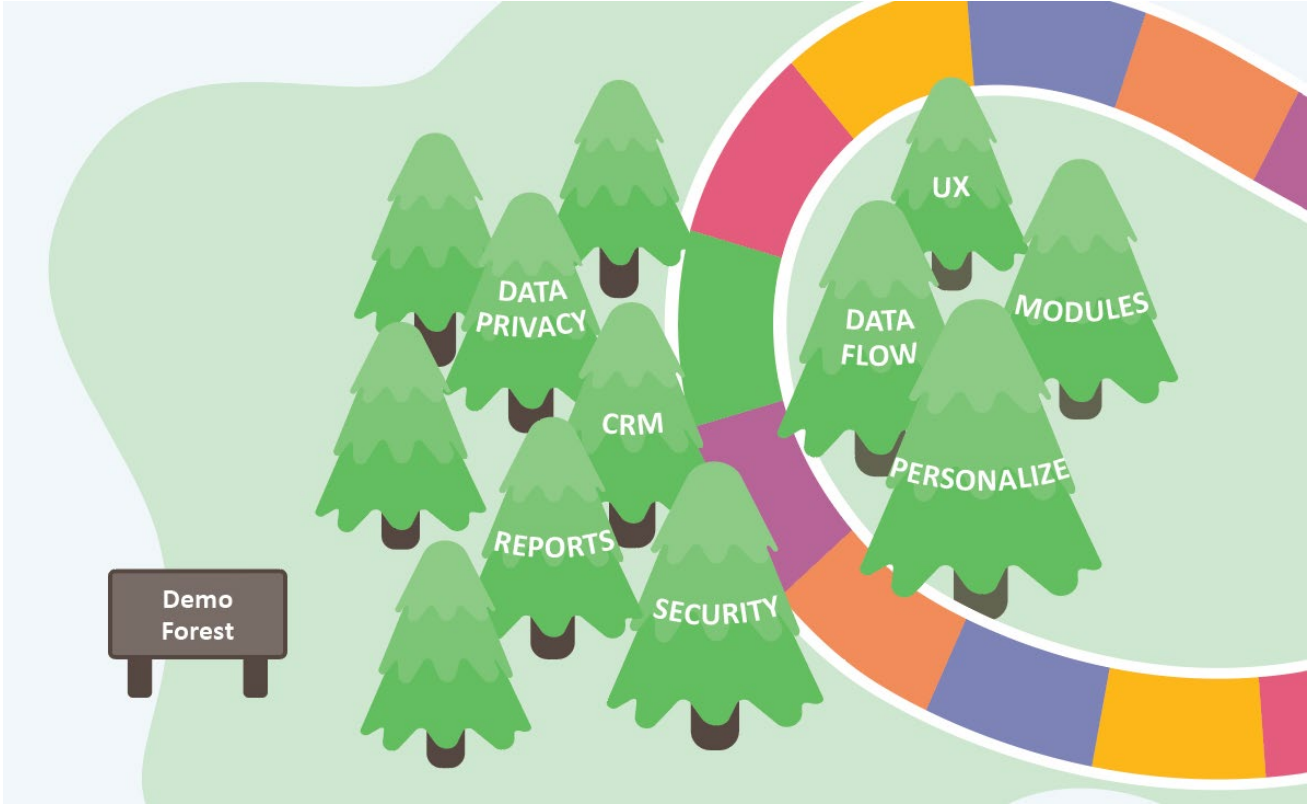
Integrations
Partners

Cost Requirements

Licensing
Implementation

Vendor Requirements

SECTION BREAK: DEMO FOREST

DEMOS: PREPARATION

- Provide Vendors

    - General agenda and outline

    - Business scenarios (tell the story of a set of requirements, describe critical, complex processes – bulk dues, group registration, chapter management)

    - Sample event and registration form

    - Draft RFP (for additional reference)

- Decide your process to evaluate vendors

DEMOS: AGENDA TOPICS

- Introduction

- Navigation

- Customer Management and Experience

- Membership

- Finance

- Query/Reports

- IT/Platform

DEMOS: OTHER CONSIDERATIONS

Depending on critical functions of your association, include the following:

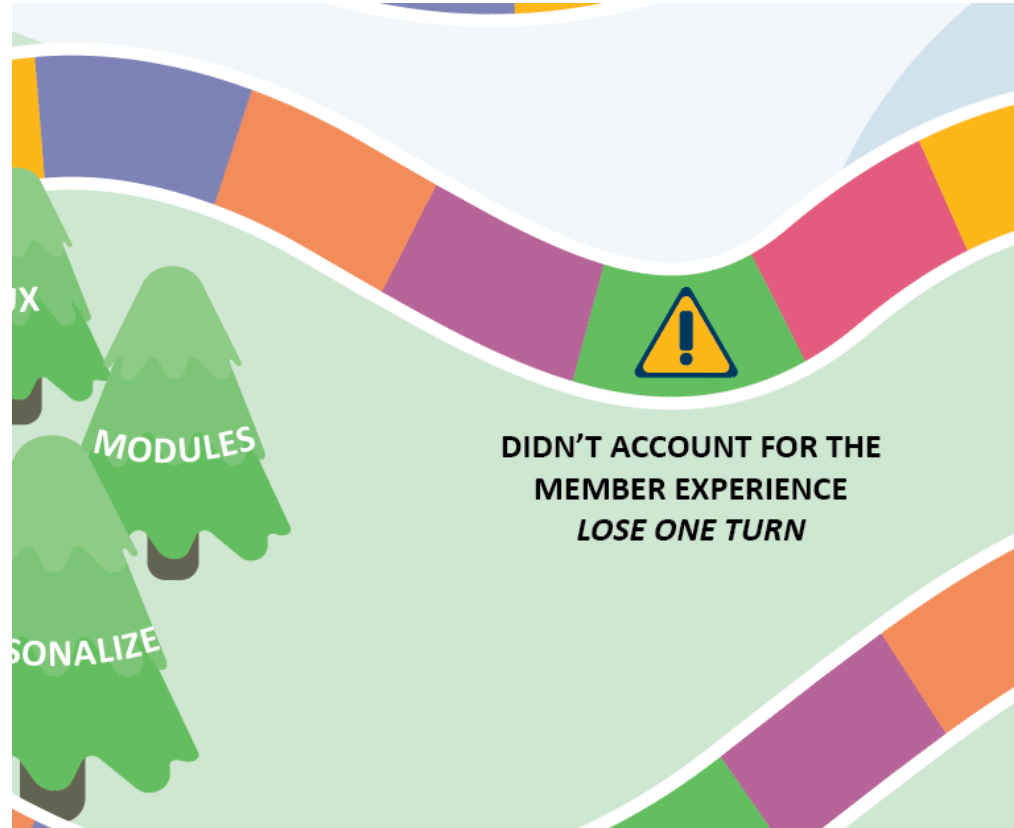Meetings/Events   Education/Certification   Publications

DIDN'T ACCOUNT FOR MEMBER EXPERIENCE!

Lose a turn!

DEMOS: IN-PERSON VS VIRTUAL

In-Person

- One full day to cover critical topics

- Follow-up demos as needed

Virtual

- One full day with a break

- Two half-day demos (either back-to-back or by topic)

- AVOID too many short meetings – you need time to focus

DEMOS: TIPS FOR VIRTUAL DEMOS

- **Pre-Test:** Ask vendors to join 15 minutes early to test access

- **Record:** Will vendors allow you to record and share?

- **Ground Rules:**

  - Identify a staff member to manage the schedule and give a 10-minute notice before a section's ending time

  - Once demo begins, staff will mute and turn off their camera to focus on the demo (okay for vendors to do same)

  - Use virtual chat feature to submit questions for vendor

EVALUATING DEMOS

Don't get distracted in notes. Focus on performance of key scenarios.

Create a 'Scoring Sheet' for Staff

- KISS

- Survey after each demo

- Focus on differentiating factors

  - E.g. customer experience, reporting, workflow tools, number of clicks

Debrief Immediately

- Score the vendor and submit right after the demo

- Identify follow-up

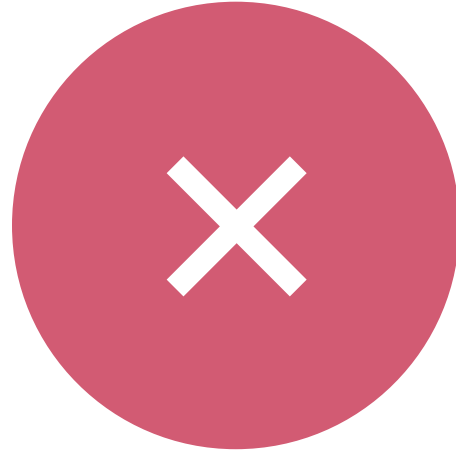- Decide to keep or reject (remember that this is a SELECTION)

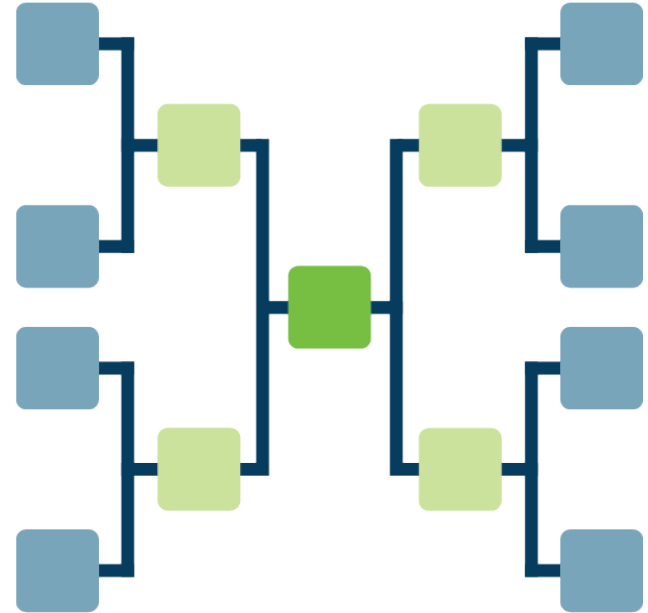# SHOULD I INCLUDE STAFF FEEDBACK THAT'S INCOMPLETE?

YES

NO

CAN YOU ELIMINATE 1 VENDOR?

Don't forget, this is a selection to identify

one vendor.

It's easier to compare two proposals, so

consider eliminating a vendor after demos.

SEND RFP – ASK FOR A PROPOSAL

RELEASE THE RFP AND THEN….

- Update selection criteria

- Define reference questions

SELECTION MOUNTAINS

PROPOSAL PACKAGE

- Master Services Agreement (MSA)

- Vendor Overview

- Response to Requirements

  - Written

  - Excel List

- Proposal Cost 'Investment'

  - Licensing, Hosting

  - Implementation

**IMPACT ANALYSIS - REVIEW <mark>INITIAL</mark> CONSIDERATIONS

What is changing?

Process today

What do you want to happen – future?

What policies, processes are needed?
- System, Workflow, Outputs, Communication

Who is involved?
- Business Owner, Finance, IT, HR, Partners

SCORING THE PROPOSALS

Don't make this too hard – focus on key elements that are essential

- Reference Check Feedback

- System Functionality

- Vendor Implementation Approach

- Vendor Resources

- Cost

- Member and Staff Experiences

	A	B
⚙	✓	✓
☁	✓	—
🔍	—	✓
◔	✓	✓

NON-TECHNICAL CHANGES>IMPACT

New Manual Process

Loss or change of functionality

More configuration and workflow options

Fewer configuration and workflow options

HANDOUT: COMPARE VENDORS (COST AND FUNCTIONALITY)

	Vendor 1	Vendor 2	Vendor 3	Contingency Budget
Discovery/Design				
Design Study/Planning				
Installation/Configuration				
System Setup				
Configuration				
Advanced Configuration				
Additional Services				
Data Conversion				
Mobile Apps/Services				
E-Commerce				
Services				
Project Management				
QA				
Testing				
Training (Admin)				
Training (General)				
Documentation				
Integration				
Website				
FMS				
Analytics & Reporting				
Product Licensing Fees				
User Licenses				
Hosting				
Additional Service fees				
Additional Services (e.g. extra test site for year 1)				
Ongoing support costs				
Day to day support				
Upgrade				

BUDGET

ALWAYS have a contingency plan: 20% minimum (don't tell PMI)

What is a good budget?

- 1% of IT budget

- $ per staff person

- Implementation (one time)

- Recurring Costs (licensing & environment)

What partner systems are you considering?

- Event, Exhibit

- DelCor Blog

DECISION

Functionality

Price

Intangibles

Best Choice

IT'S OKAY TO SELECT THE SYSTEM YOU LIKE

- Systems in the same class are similar

- What system can you SEE yourself using?

- Did it make sense during the demo?

- Make a choice

DECISION TIME!

CONTRACT (MSA AND SOW)

Legal

- Data Security
- Insurance
- Intellectual Property
- Service Level Agreement
- Termination
- Warranty...

Work Together

- Acceptance
- Deliverables
- Exit Strategy
- Fees/Payments
- Project Management
- Testing...

REMEMBER… THERE'S NO MAGIC WAND!

- Envision how the AMS fits within your data ecosystem (beholder of all data or piece of the pie)

- Define what success looks like to your organization post-launch
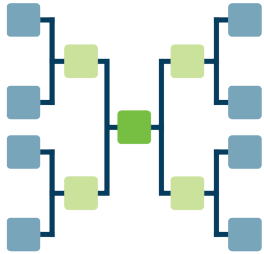
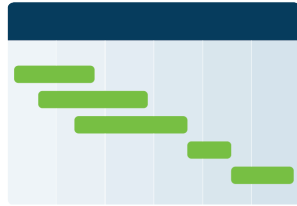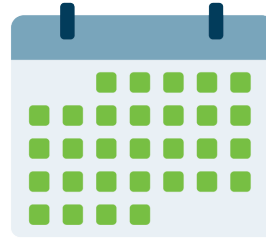- Set realistic expectations for your staff and volunteers

WHAT'S NEXT?

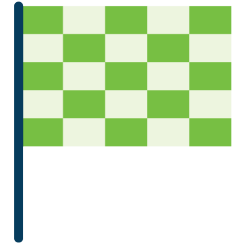| Partner	Plan	Schedule	Start

Choose the partner that is the best fit for your organization.

Review staff calendars and plan for the selection process.

Schedule the project kickoff and discovery meetings.

Get started! There's never going to be a better time to start.

ADOPTION CASTLE
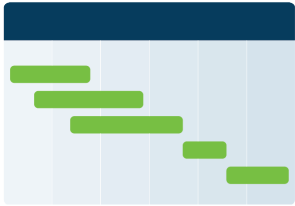
LOSE A TURN!

WHAT AREAS CAN YOU ADDRESS RIGHT NOW?

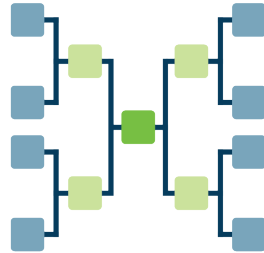# WHAT'S NEXT?

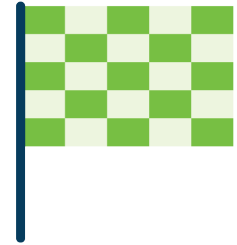| **Plan**	**Identify System**	**Schedule**	**Start**
Identify your goals and align with your association's strategy	Create a business system ecosystem map	Start small and build – this does not have to happen all at once	Get started! There's never going to be a better time to start.
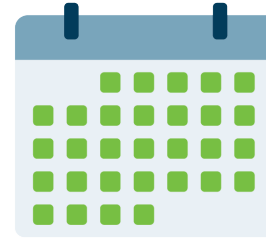
PREPARATION

- **Data Inventory**

  - Source

  - Type of data (customer, invoice, demographics)

  - Purpose

  - Quality

  - Will it convert?

IMPLEMENTATION PLANNING
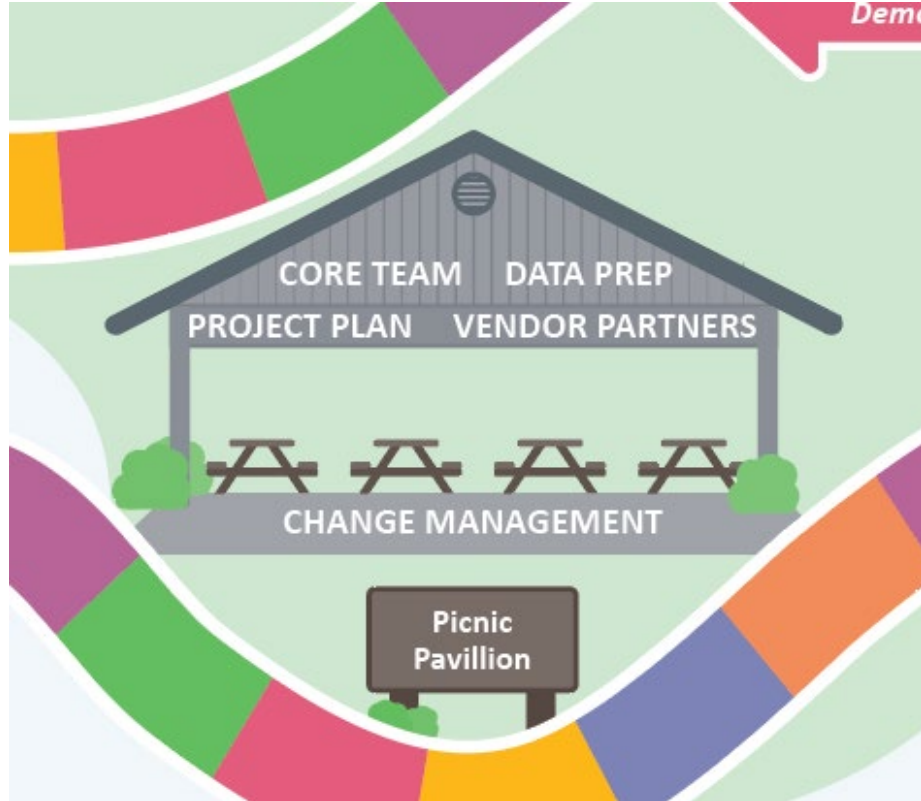
CORE TEAM TASKS

1. Reset Core Team

   1. Update roles for each implementation phase (discovery, configuration, testing, launch, post-launch adoption)

   2. Confirm executive sponsor

2. Establish feedback process

3. Establish change management process

4. Confirm roles at each stage of the project

PARTNERS

Ask about Partner network – this is very helpful!

- Experts leave application provider and start their own company
  - Element, Plutus, Aplusify, Meto-Dao, Velosio, En-SYNC
  - RSM, Fionta, fusionSpan, Wipfli

- Implementation Services

- Long Term Support

VENDORS YOU SHOULD VISIT AT AMS FEST?

IMPLEMENTATION PLANNING

Extra docs

COMMUNICATION: STAKEHOLDER ANALYSIS (FLIPCHART)

Dry Run for Selection – Critical During Implementation
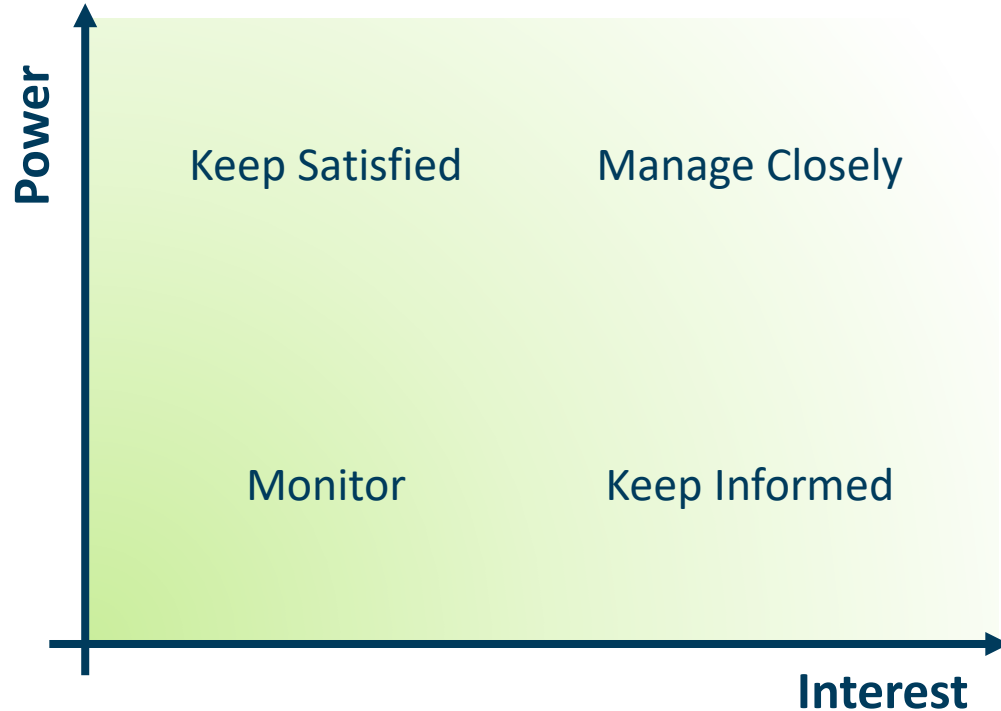
COMMUNICATION: RACI CAN MAKE OR BREAK

Responsible	Accountable	Consulted	Informed

Responsible
- Carries out the process or task assignment
- Responsible to get the job done

Accountable
- Accountable for the process or task being completed appropriately
- Responsible person(s) are accountable to this person

Consulted
- Not directly involved with carrying out the task, but are consulted
- May be a stakeholder or a subject matter expert

Informed
- Receive output from the process or task, or those who have a need to stay informed

COMMUNICATION: RACI EXAMPLE

The discussion of roles is as important as the chart. Only 1 A (Accountable)

Task	Project Manager	Business Analyst	Technical	Development	Finance	Executive
RACI Matrix						
Project Planning	A	I	C	C	C	C
Project Initiation	A	I	I	I	I	I
Project Charter	A	I	C	C	I	I
Stakeholder Analysis	A	C	C	C	I	I
Develop Use Cases	A	R	R	R	R	R
Participate in Demos	A	R	R	R	R	R

VENDOR DISCOVERY

Yes, information will be covered AGAIN!

1. Vendor review requirements and add details

   - Focus on your business OUTCOMES are validation requirements

2. RFP will be replaced by vendor implementation plan

   - CROSS CHECK carefully!

IMPACT ANALYSIS – ADD ADDITIONAL INFORMATION TO VENDOR DOCS

What is changing?	Separate system change and internal processes changes
Process today	
What do you want to happen – future?	
What policies, processes are needed?	• System, Workflow, Outputs, Communication
Who is involved?	• Business Owner, Finance, IT, HR, Partners

CHANGE MANAGEMENT ROLES AND RESPONSIBILITIES

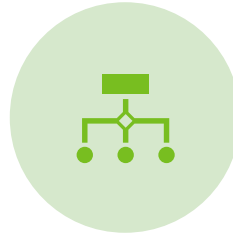| Role	Responsibility
Change Team	• Facilitate key functional configuration decision-making. • Obtain buy-in from business areas. • Manage customer experience and integrations with website partners. • Ensure change management initiatives are implemented (e.g., policy changes, external/member communications).
Project Change Manager	• Involve leaders by conducting leadership workshops. • Identify key stakeholders, complete a change impact assessment, and determine communication and engagement needs. • Coordinate with training delivery teams to develop/deliver training. • Engage with the Change Team.
Change Management Sponsor	• Executive team member who is accountable and responsible for the overall project.

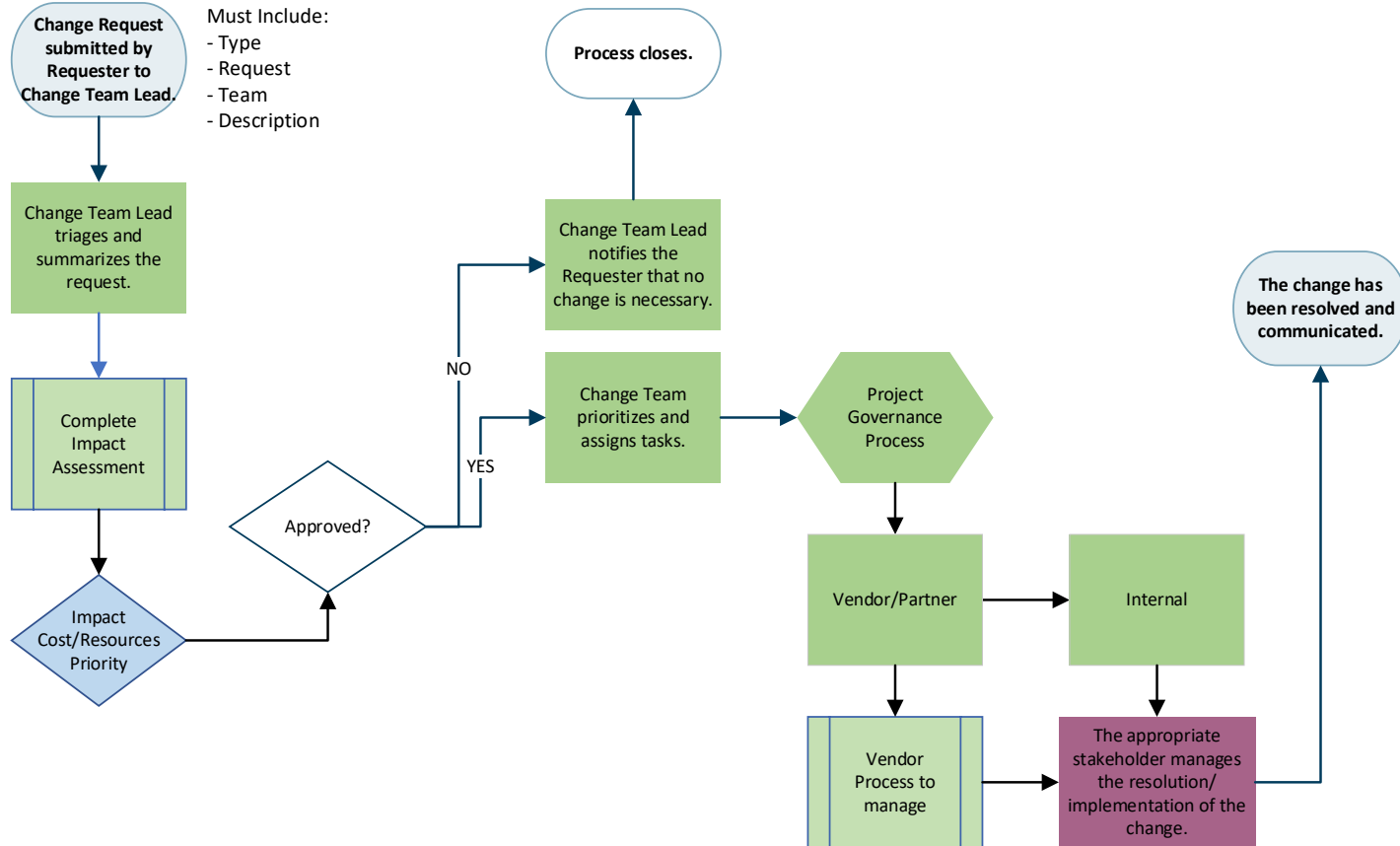# TYPES OF CONF OPTIONS

CONFIG CHANGE

ADD WORKFLOW/AUTOMATION

VALIDATION (AUTOMATED, MANUAL)

INTEGRATION/PARTNERS

SAMPLE WORKFLOW

Change Request submitted by Requester to Change Team Lead.

Must Include:
- Type
- Request
- Team
- Description

Process closes.

Change Team Lead triages and summarizes the request.

Change Team Lead notifies the Requester that no change is necessary.

The change has been resolved and communicated.

Complete Impact Assessment

NO

Change Team prioritizes and assigns tasks.

Project Governance Process

YES

Approved?

Impact Cost/Resources Priority

Vendor/Partner

Internal

Vendor Process to manage

The appropriate stakeholder manages the resolution/ implementation of the change.

REINFORCEMENT

- **Plan for Adoption NOW**

- **Develop Training Plan**

  - Onboarding new staff

  - Launch Training

  - Advanced Training

  - AMS +

    - SF Trailhead, Dynamics CRM, Power BI, Automation tools

- **Examine, Repeat, Adjust**

RESOURCES

- ASAE AMS Resources/ASAE Collaborate
- Consultants
- AMS Fest
- Review My AMS
- DelCor AMS Selection
- DelCor AMS Fest Resources

CONTACT US

📞 **877-4DELCOR**
301.585.4222

▶️ **@delcortech**

f **@delcortech**

📷 **@delcortech**

🐦 **@delcor**

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