

AMS Bootcamp

AMS Fest DC

November 2025

Exercise: Our Main Concern Is...

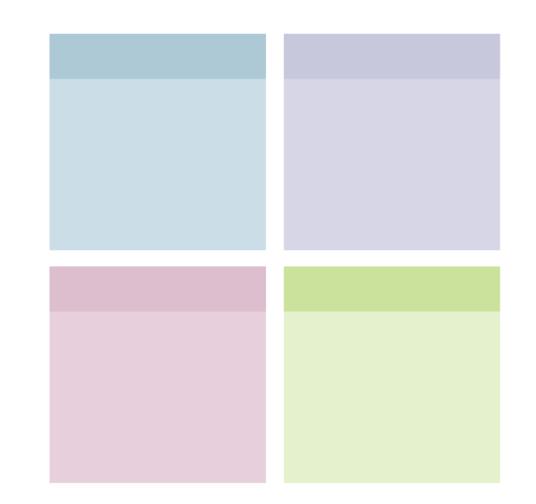
WORD WALL (Post-Its)

What are your system concerns?

What are your vendor concerns?

I want to make sure we cover....

What is your confidence level?



Label Yourself

What AMS are you using today?



Introductions: Technology Guides



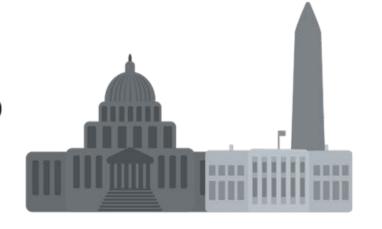
Gretchen Steenstra Soil Therapist



Kelly Gardner Bee Rescue

DelCor Snapshot

DC OFFICE: SILVER SPRING, MD



MIDWEST OFFICE: CHICAGO, IL

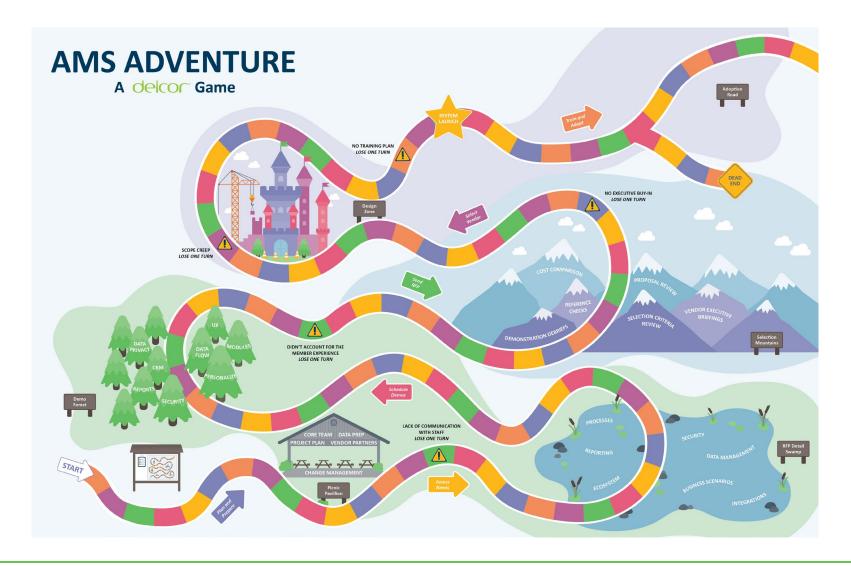


501(C) COMMITMENT 40+ YEARS IN BUSINESS

90+ FULL-TIME STAFF 40+ DIFFERENT CERTIFICATIONS

VENDOR-AGNOSTIC CONSULTING

AMS Adventure: A DelCor Game



Agenda

- Technology Partners
 - The AMS is PART of a tech stack
- System Selection 101
 - Essential Selection Topics: Member Benefit or Revenue
 - Tools: What tools do you need to help develop the selection documents?
- System Selection Details
 - Business Processes and Requirements: What do you define and how?
 - Selection Decisions: How do you evaluate vendors?
 - Contracts: What should you consider to augment the legal review?

CRITICAL INFO

Member Benefit/Revenue



Identify Changes

Inefficiencies: Identify processes that need improvement Listen for **Impact**

Preserve What Works: Maintain effective functionality Focus for **Outcomes**

Flag for Policy Review: Spot changes that may require policy updates Need **Action** Now?

Watch for Human Impact: Recognize changes affecting staff or members Plan for **Adoption**

Impact Analysis - Part 1

Type of Change	Impact Level	Adoption	
Process Improvement	High	Define workflow and impacts	
Policy Update	Medium	Develop and refine	
System Enhancement	Vary	Training and adjustments	
Staff Workflow Change	High	Introduce early in the process	

What do vendors need to know?

Can Compare	Very Similar
Customer Management & Relationships	Customer Communication Tracking
Membership Models	Committees
Chapter Models	General Finance (A/R, billing)
Events	Subscriptions (basic)
Finance (select info – deferral)	Email – Transactions and Reminders
Products	
Services	
MyAccount/E-Commerce	
Data (reporting/analysis)	
Integration & Partnerships	

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Common Functions of an AMS

Functional Area	Revenue (\$-\$\$\$)/Benefit	Partner?	Comments
CRM			
Membership			
Committees			
Certificate			This is not certification.
Chapter/Region			
E-Commerce/MyAccount			
Events (Basic)			
Finance			
Fundraising (Basic; Donations with Dues)			
Products			
Sales			
Subscription (Basic)			
IT			
Data and Analytics			
API Access			

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AMS, CRM, or ??

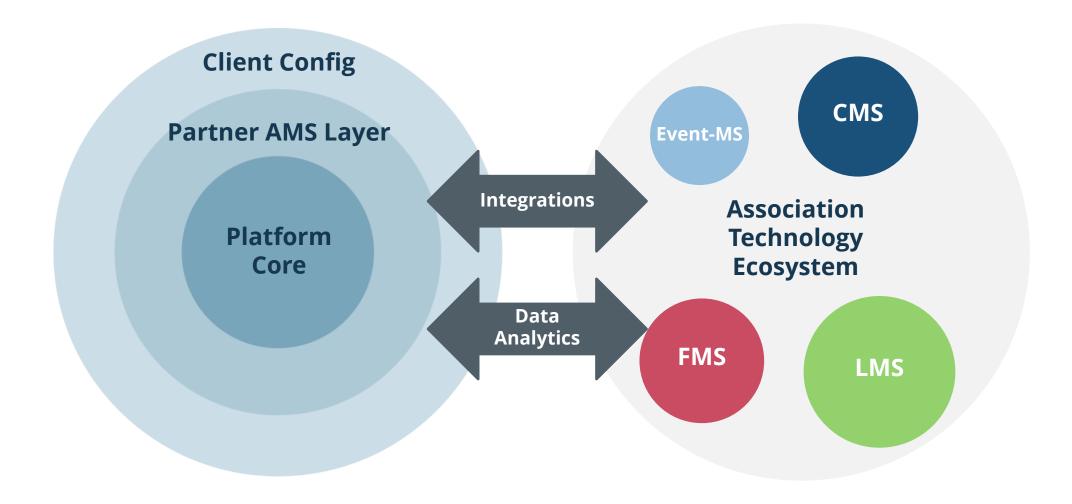
What system do you REALLY need?



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

Relationships: System, Vendor, and Association

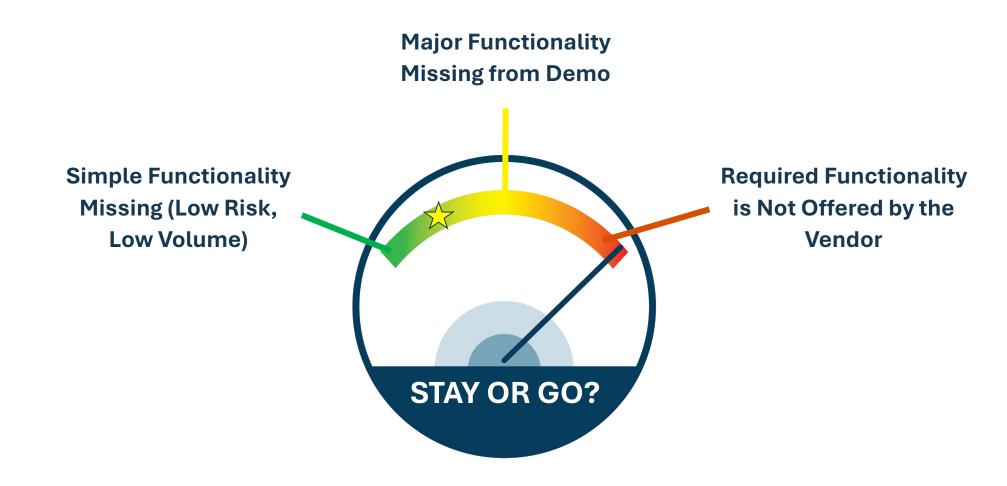


Integration Focus

AMS Data Source	Field	Purpose	Partner Systems
Update at save	Customer ID	Main ID to link customers across systems	From AMS Partner Systems
Update at save	Email	User Identifier	May be bi-directional
Update at save	Member Status	Pricing delivered by Partner	From AMS Partner Systems
AMS Receives Data: LMS	Field	Purpose	Direction
From LMS to AMS	Course Name	Provide a summary of course information in the AMS as part of the AMS record	One Way
From LMS to AMS	Course Date Purchased		One Way
From LMS to AMS	Course Amount (\$)		One Way
From LMS to AMS	Course Completion Date		One Way
From LMS to AMS	Invoice/Transaction ID		One Way
AMS Receives Data: CertMS	Field	Purpose	Direction
From Credential to AMS	CertID	Provide a summary of credential information in the AMS as part of the AMS record	One Way
From Credential to AMS	Each Credential		One Way
From Credential to AMS	Current Status		One Way
From Credential to AMS	Expiration Date		One Way

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Risk: All-in-One or Diversify? Make a Pro/Con Slide

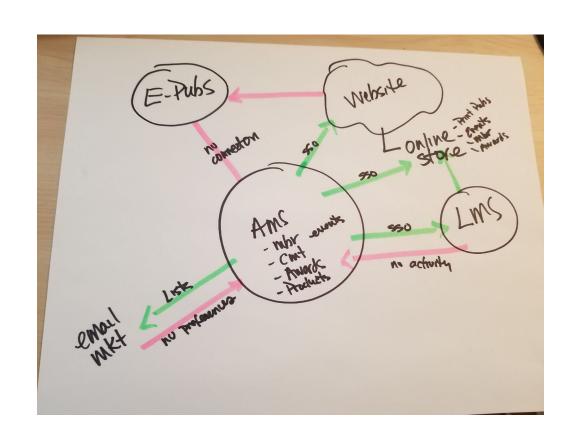


Ecosystem: Draw Your Ecosystem (Screen Break)

Include if:

- 1. Revenue
- 2. Member benefit (real one)
- 3. Support future growth

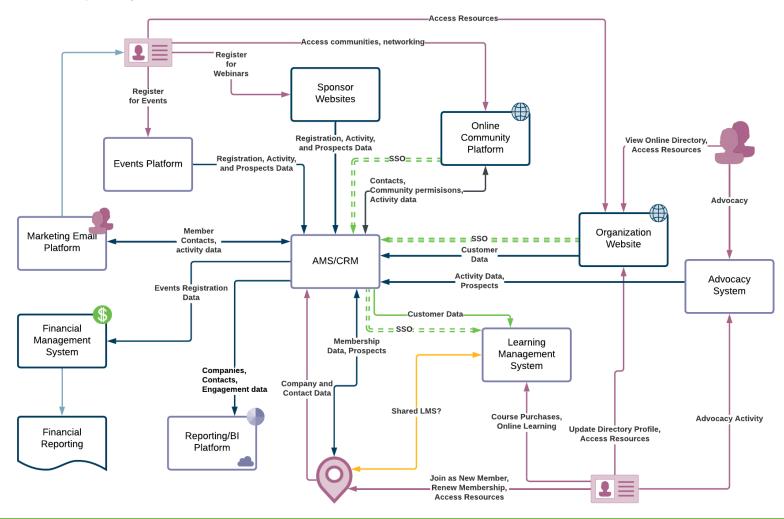
OTHERWISE, **leave it behind** or integrate!



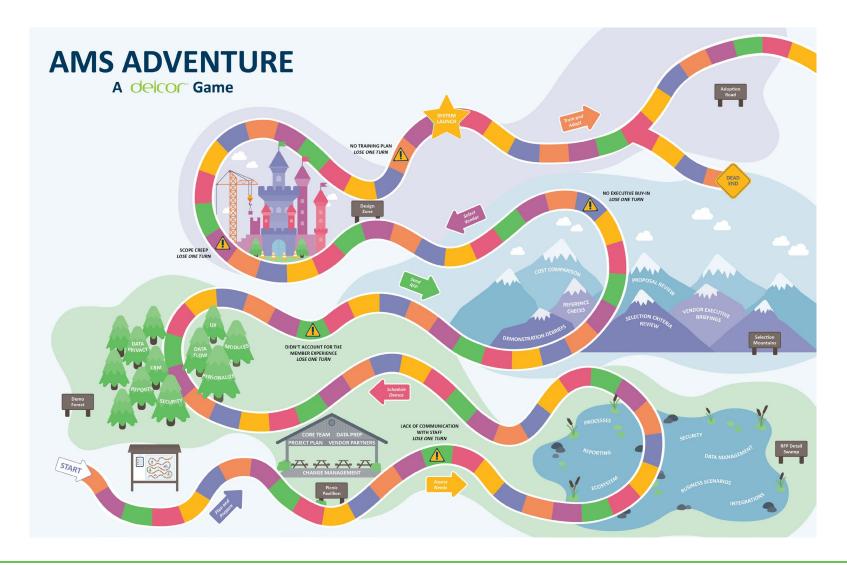
You Need This!

SAMPLE

Future State Ecosystem Diagram



AMS Adventure: A DelCor Game



Poll

How long should the selection take?

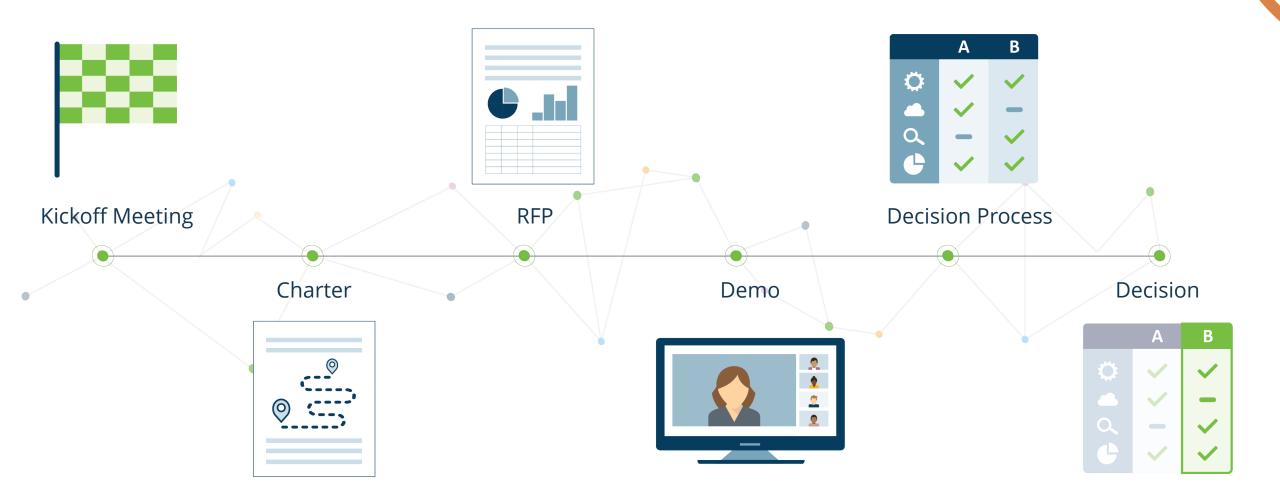
- A. 1-3 months
- B. 3-6 months
- C. 6-9 months
- D. 12+ months



Selection "Start"



System Selection Phases



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

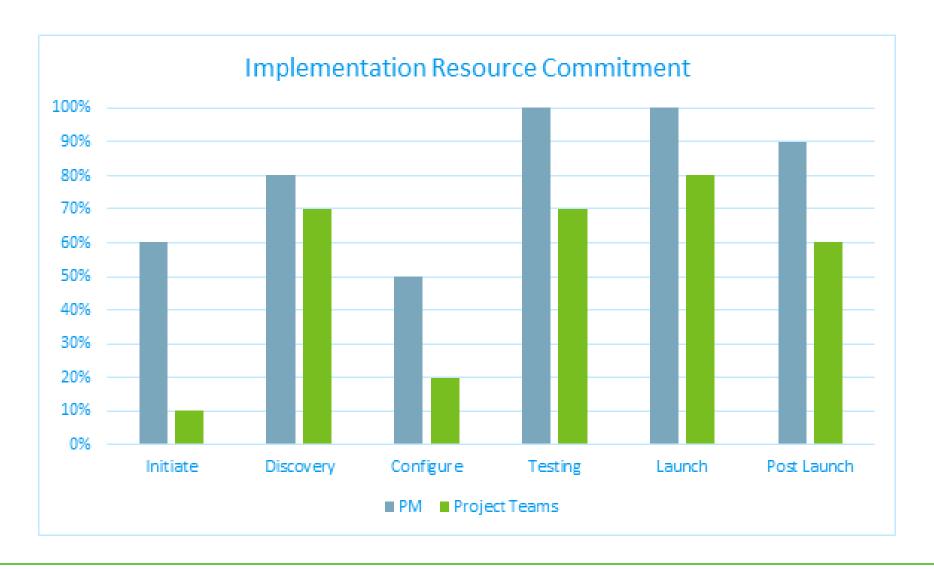


Selection Time Commitment

				Staff Time Commitment	
Phase	Timeframe	CLIENT Staff Task	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	

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Roles and Resources: Implementation



Lack of Communication

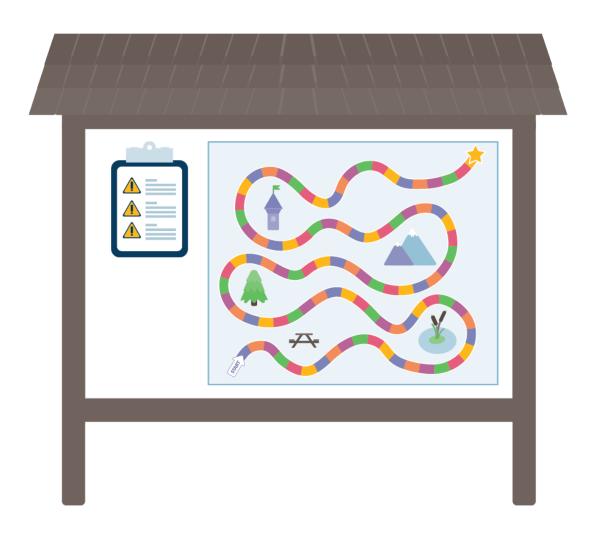
Lose a turn!



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

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 (What and Why – not How)
- Align association goals and business functions
- Refresh and improve processes
- CLARITY (check the box)
- Same info from each vendor



RFPs 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

Requirements Section



Where Do You Find Requirements?

Standard Operating Procedures (SOP)

Tribal Knowledge **Organizational Goals**

Member/Customer Needs and Processes

Staff Needs and **Processes**

Requirement: Add to RFP or Skip?

- 1. Salesperson said your needs are in baseline system
 - 1. Include in RFP?
- 2. Email is easy = Required
- 3. Integrate with other systems = Required
- 4. User Experience in intuitive = Required
- 5. Al included in solution = Yes

Requirement: Add to RFP or Skip?

- 1. Event Registration Process managed in cvent
- 2. Abstract Process managed in cOasis

*Integration requirements only – do not document full set of requirements

Al, Automation - what is the difference?

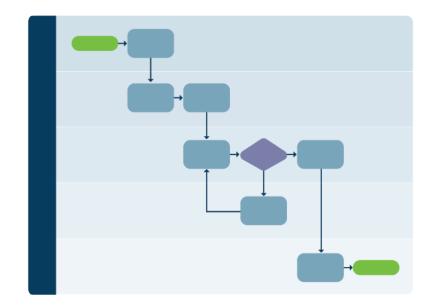
- Every system says the offer both. Consider the following questions:
- Automation help streamline a set of business rules to support a process.
 The automation is governed by defined rules and either works or does not.
- 2. AI has a VARIETY of definitions. AI makes DECISIONS or offers NEW information based on existing data that is available (public or private).
 - 1. What is vendor Al **model**?
 - 2. What **tool** is used (e.g. OpenAl, Google, custom)
 - 3. What is the vendor **data privacy and ethics policy** and actions?
 - **4. How** is the tool used?
 - 5. What **configuration** options are available to the client?
 - 6. What are **YOUR** ORGANIZATION'S **REQUIREMENTS** around AI?

Business and Processes: Just Enough Detail

BUSINESS processes

VS

business PROCESSES



Tell Your Story (What and Why)

Find the best way to tell your story and break it down into requirements. Focus on what vs how.

- Functional Requirements (System Behaviors)
- Non-Functional Requirements (System Performance)



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







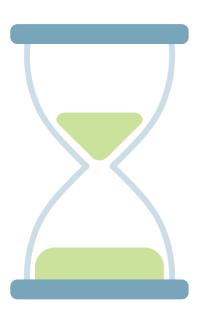
Review Your Requirement

- Is it comparable?
- Is it scorable?
- Is it a single requirement/single answer (baseline Y or N)?
- Can a stranger understand it?
- What is the member/customer point of view?
- Is this integrated with another system or process?
- What data is needed for reporting and analysis?
- Do you need to add context? Vendors don't know all the facts!

SAMPLE: User Story/Scenario: Points of View

- 1. Staff creates over 50 email templates: one for every event and every member type. The system has a drop-down to select the template for each event and member type. When a customer purchases a product, the email is sent to the customer using the customer email portal developed by the internal IT team.
 - 1. As a **customer service rep**, I want to send an email confirmation to members after a purchase.
 - 2. As a **member**, I need to receive an email with details about my purchase that includes details about the event.
 - 3. As an **IT team member**, I need to configure a workflow so that the payment and email process is executed without manual intervention.

10 Minutes...GO!





EXERCISE: Integration Case Scenario

- My organization has three major systems that rely on each other, the AMS has customer data and transactions.
 The LMS manages education from purchase to delivery.
 The website is where all information from the LMS is promoted.
 - 1. As a member, I want to sign up for a live webinar that is on my organization's website where I can earn **continuing education** and see my unified transcript in my AMS profile.
 - 2. As a **customer service rep**, I need to see if the member has paid for the registration, is able to access the course, if they completed it.
 - 3. As an **IT team member**, I need to configure a workflow to promote the course on the website, support sign in between the AMS and LMS, for appropriate pricing and access. As well as workflow to update the customer profile with the course completion.

Requirements Workshop

- 1. Write requirements for the case (what and why, not how)
- 2. Rotate
- 3. Edit/Refine
- 4. Review

Signal Words (Ask more questions!): intuitive, simple, user-friendly, easy, integrated, DIY, training and documentation, user, design

Review Your Requirement

- Is it comparable?
- Is it **scorable**?
- Is it a single requirement/single answer (baseline Y or N)?
- Did you include your future goals and outcomes? E.g. Automation/Al?
- Can a stranger understand it?
- What is the member/customer point of view?
- Is this integrated with another system or process?
- What data is needed for reporting and analysis?
- Do you need to add context? Vendors don't know all the facts!

Finalize RFP



REMINDER: Vendor Discovery Phase

Yes, information will be covered again!

- Vendor review requirements and add details
 - Focus on your business OUTCOMES are validation requirements
- RFP will be replaced by vendor implementation plan
 - CROSS CHECK carefully!

Pull It Together to Build the RFP

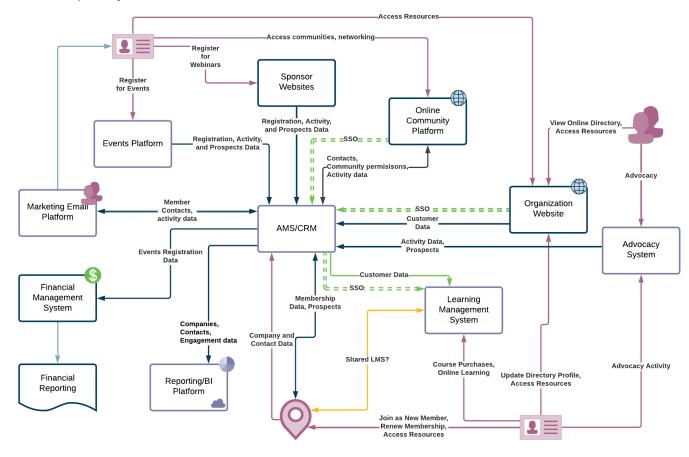
Checklist:

- ☐ Introduce the project
- Background of your organization
- Project goals and scope
- Business objectives
- □ Requirements of functional areas where the AMS is source of revenue or benefits!
- ☐ Ecosystem Current and Future
- Instructions to vendors
- Appendix: E.g. Summary of other functions such as committees, awards, etc. for reference and samples of complex reports

RFP: Add Ecosystem Diagrams (Focus on the Future)

SAMPLE

Future State Ecosystem Diagram



Release the RFP?





Poll

How many vendors should I consider?

- A. 8
- B. 2
- C. 5
- E. All the above (18)



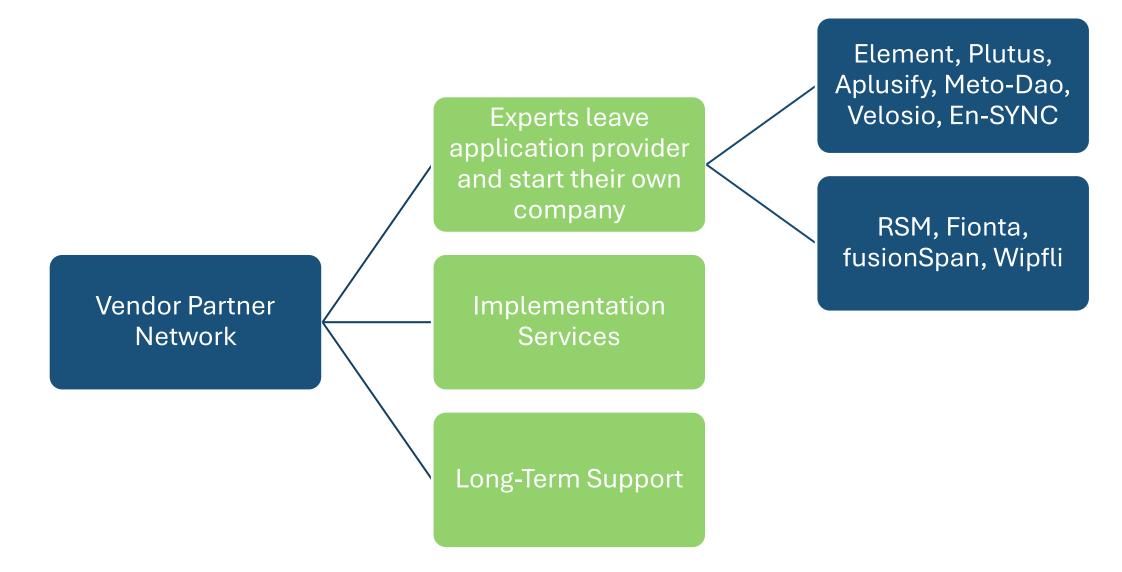
Vendors: Talk to Them!

Tell vendors what you need and then make them prove that 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



Partners: Diverse Expertise/Offset Risk



Selection Criteria: Highlights



Functional Requirements

Customer-Facing e-Commerce **Exports**



Platform and Services

Integrations Partners



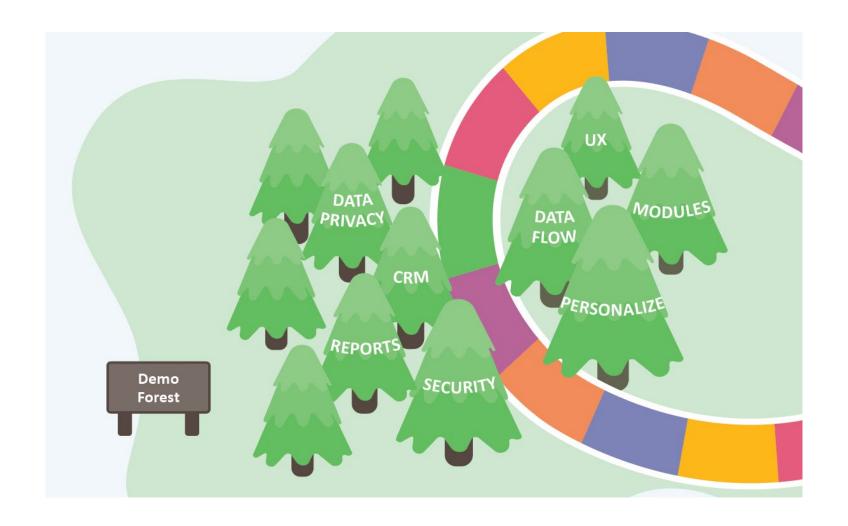
Cost **Requirements**

Licensing Implementation



Vendor **Requirements**

Section Break: Demo Forest



Demos: Preparation

- Provide the following to the vendors:
 - General agenda and outline
 - Business scenarios
 - Tell the story of a set of requirements
 - Describe critical and complex processes including bulk dues, group registration, and chapter management
 - Sample event and registration form
 - Draft RFP (for additional reference)
- Decide on your process to evaluate vendors



Demos: Agenda Topics

- Introduction
- Navigation
- Customer Management and Experience
- Membership
- Finance
- Query/Reports
- IT/Platform



Didn't Account for Member Experience: Lose a Turn!



Demos: In-Person vs Virtual

In-Person

- One full day to cover the 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 the notes. Focus on performance in key scenarios.

Create Staff 'Scoring Sheet'

- KISS
- Survey after each demo
- Focus on differentiating factors (e.g., customer experience, reporting, workflow tools, 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)

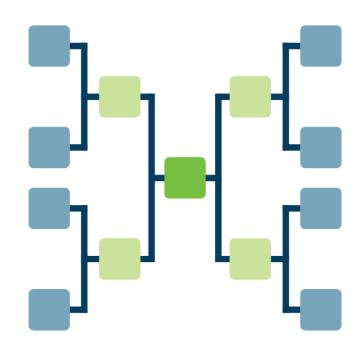
Should I Include Incomplete Staff Feedback?



Can You Eliminate One 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.



65

Send RFP and Ask for a Proposal



Release the RFP and then...

- Update selection criteria
- Define reference questions



Selection Mountains



Proposal Package

- Master Services Agreement (MSA)
- SOW for Implementation
 - Vendor Overview
 - Response to Requirements
 - Written
 - Excel List
- Investment Fees
 - Licensing (include sandboxes, ALL apps including partners)
 - Hosting (include back up, security, SOC2 compliance statement)
 - Implementation

Scoring the Proposals

Don't make this too hard. Focus on the key elements that are essential.

- Reference Check Feedback
- System Functionality
- Vendor Implementation Approach
- Vendor Resources
- Cost
- Member and Staff Experiences



Handout: Compare Vendors (Cost and Functionality)

Category	Vendor 1	Vendor 2	Vendor 3	Contingency Budget	Notes
Discovery/Design					
Design Study/Planning					
Installation/Configuration					
System Setup					
Configuration					
Advanced Configuration					
Additional Services					
Data Conversion					
Mobile Apps/Services					
E-Commerce					
Services					
Project Management					
Quality Assurance					
Testing					
Training (Admin)					
Training (General)					
Documentation					
Integration					
Website					
FMS					
Analytics and Reporting					
Product Licensing Fees					
User Licenses					
Hosting					
Additional Service Fees					
Additional Services (e.g., extra test site for Y1)					
Ongoing Support Costs					
Day-to-Day Support					
Upgrade					

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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

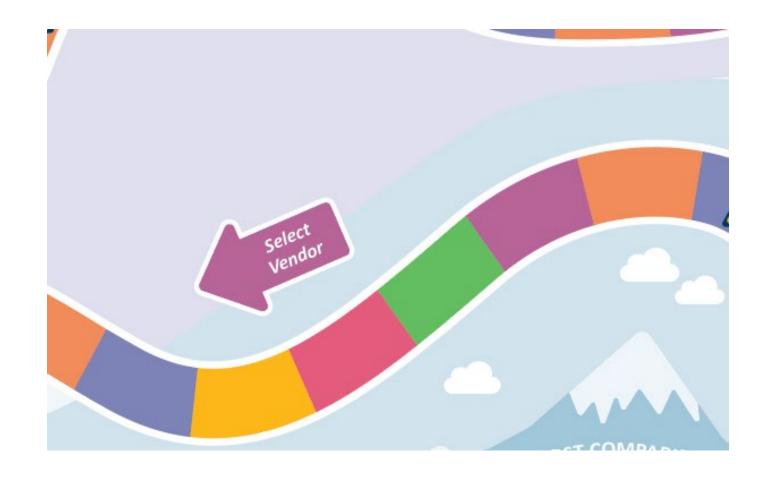


It's Okay to Select the System You Like

- 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...

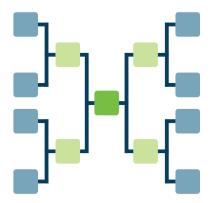
Remember...There's No Magic Wand!

- 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



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

Plan



Review staff calendars and plan for the assessment.

Schedule



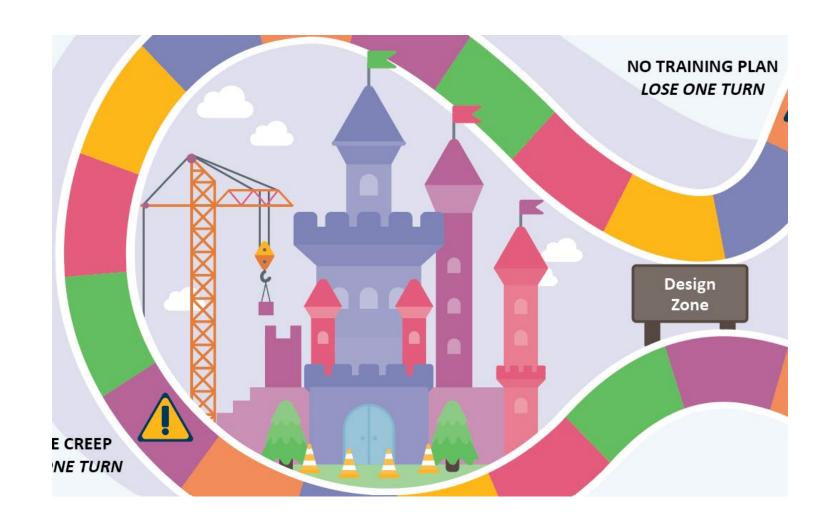
Schedule the project kickoff and discovery meetings.

Start



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

Adoption Castle



Non-Technical Changes > Impact



New Manual Process



Loss or change of functionality



More configuration and workflow options



Fewer configuration and workflow options

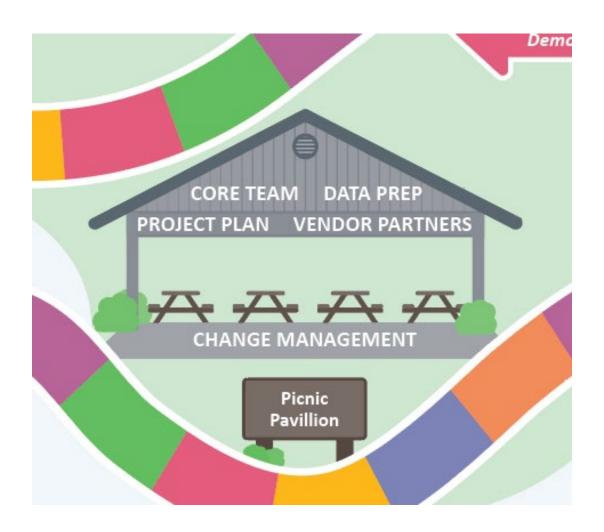
Scope Creep: Lose a Turn!



What Areas Can You Address Right Now?



Implementation Planning



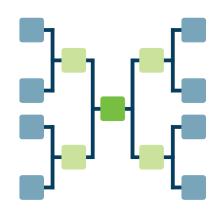
What's Next? Start Strong and Be Prepared

Plan



Identify your goals and align with your association's strategy

Identify System



Create a business system ecosystem map

Schedule



Start small and build – this does not have to happen all at once

Start



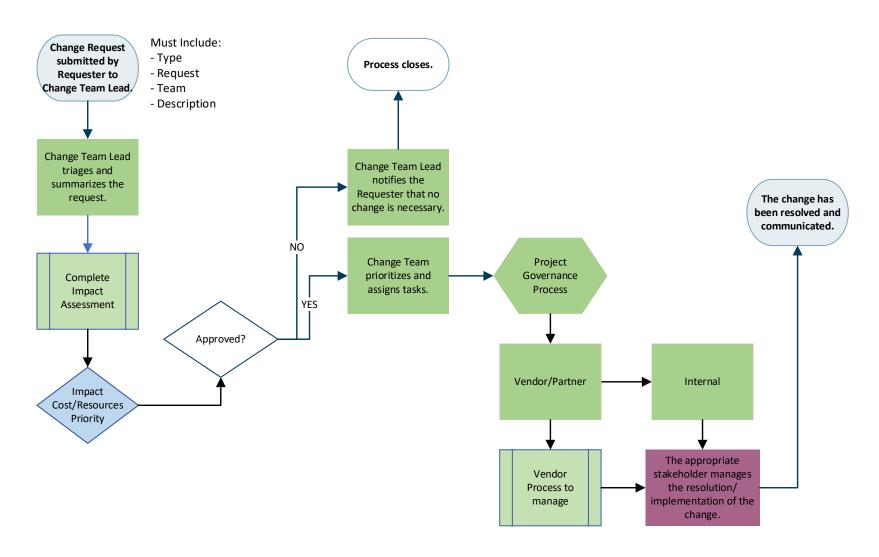
Get started!
There's never going to be a better time to start.

Core Team Tasks

- 1. Reset Core Team
 - Update roles for each implementation phase (discovery, configuration, testing, launch, post-launch adoption)
 - 2. Confirm executive sponsor
- 2. Establish feedback process
- 3. Confirm roles at each stage of the project (Discovery, Config, UAT)
- 4. Establish change management (OPPORTUNITY) process

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Sample Change Management Workflow



Impact Analysis - Add 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

Preparation

Data Inventory

- Source
- Type of data (customer, invoice, demographics)
- Purpose
- Quality
- Will it convert?



Vendors You Should Visit at AMSFest?

2025 FALL SHOWCASE COMPANIES + DEMO





























































Connect and Resources

Connect with a Colleague!

- ASAE AMS Resources/ASAE Collaborate
- Consultants
- AMS Fest
- Capterra
- Chicago Forum







HOME / DELCOR SELECTION BOOTCAMP | THANK YOU

DelCor Selection Bootcamp | Thank You

Apr 21, 2025

A Message from Gretchen



AMS Selection Resources

Session Materials

- Presentation
- Ecosystem Worksheet B
- Evaluation and Scoring Sheet ☑
- RFP Checklis
- Template Project Charter
- Template Reference Check 2
- AMS Fest Shopping Worksheet

Contact Us



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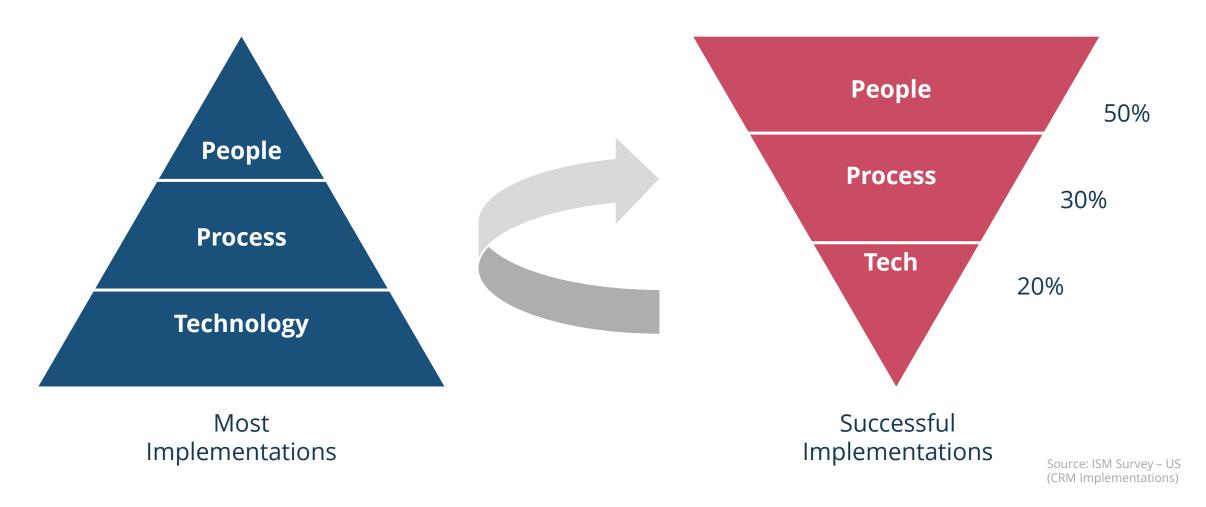


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Additional Materials



Why Do Big Tech Implementations Fail



Change Control vs. Change Management



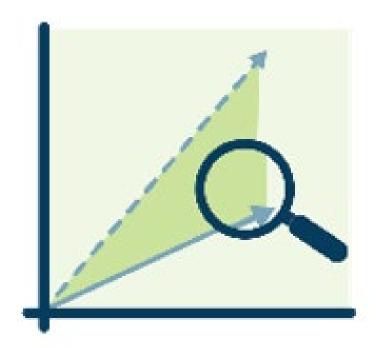
Change control is the decision to make a change, whereas change management refers to the aftermath of that decision.



Change management = [change control] + communication + training + adoption

Adoption: Start Planning

- System Change to Work Change
- Identify Major Changes Now
 - System
 - Staff Process
 - Member Expectations
- Training
 - What can you learn now?



Project Charter

5 Ws (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?

Communication: RACI Can Make or Break

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. Remember, only one A!

RACI Matrix						
Task	Project Manager	Business Analyst	Technical	Development	Finance	Executive
Project Planning	A	1	С	С	С	С
Project Initiation	Α	1	1	1	1	ı
Project Charter	А	1	С	С	1	ı
Stakeholder Analysis	A	С	С	С	ı	ı
Develop Use Cases	А	R	R	R	R	R
Participate in Demos	А	R	R	R	R	R

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.

Vendor Discovery

- 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



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