



AMS Bootcamp

AMS Fest DC

September 2026



Exercise: Our Main Concern Is...

WORD WALL (Post-Its)

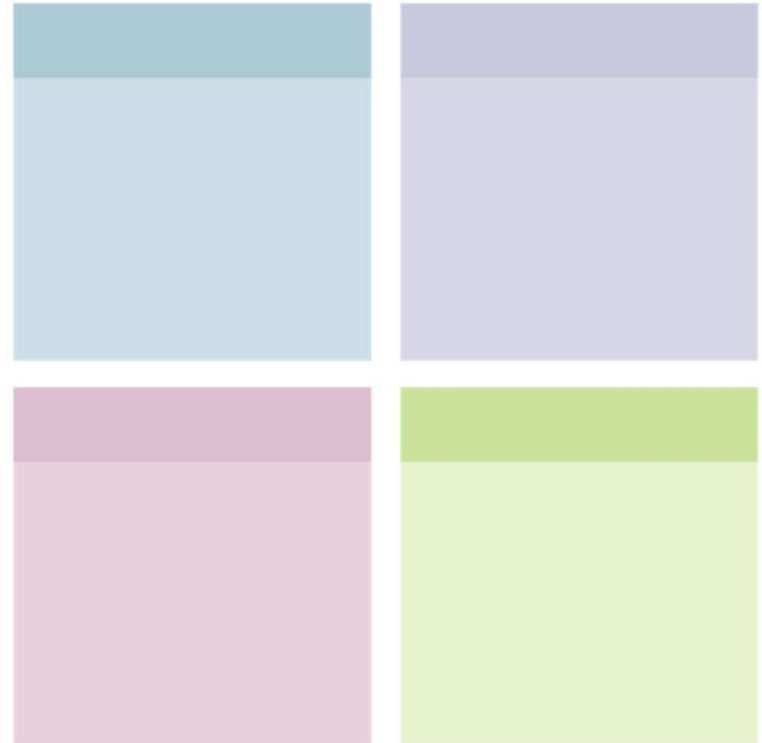
Poll: Stay, Fix, Go

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



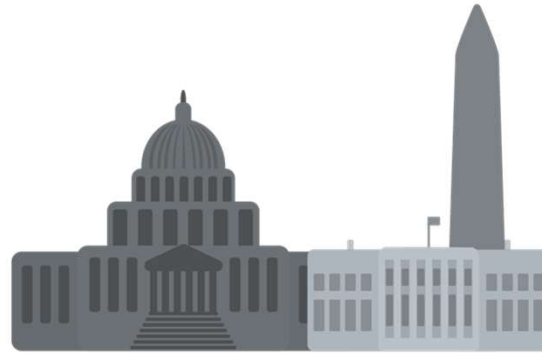
Gretchen Steenstra
Soil Therapist



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



Agenda

- Stay or Go?
- 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?

Stay or Go?



STAY

The AMS fits future needs and issues are operational.

Impact: Low

Next move: Optimize configuration, training, process, data governance.

Add partner system such as Awards Mgmt.

INVEST

The AMS is annoying yet functional.

Impact: Medium

Next move: Invest resources to run a targeted improvement sprint and define success measures.

GO

Core requirements, ecosystem, vendor, or strategy fit cannot be resolved.

Impact: High

Next move: Start selection with weighted criteria and documented requirements.

Separate Feelings from Facts

Emotion is useful. Evidence makes it actionable.

Feeling signals

"It's ugly."
"We hate the vendor."
"No one likes the portal."
"It takes too many clicks."
"We have to export everything."

Fact checks

Can users complete critical journeys?
What data is inaccurate, and why?
Which workarounds are required?
What does the vendor roadmap actually address?
What KPIs are blocked today?

Business Owners vs. IT

- Association maturity
- Shifting skills
 - Business Owners: Have more responsibility as admin
 - IT: Environment, Security, Access, Integration
 - Self-sufficiency: Workflow and AI Services
- Communication and Coordination
 - Load balance across teams and partners
 - Competing processes and work overlaps



Ecosystem Goals: Centralize or Shrink the AMS

The AMS is one part of the member experience, not the whole universe.

System	Data	Integration	Security/Access
AMS			
FMS			
LMS			
Event MS			
Marketing (email)			
Analytics			



Ecosystem Goals: Centralize or Shrink the AMS

Questions to Consider:

1. What are high-value experiences and revenue areas?
2. Should elements of the AMS move to other systems (e.g., events, certification)?
3. How do IT strategies support the organization (Technology, AI, Data, Integration)?
4. How is “source of truth” defined?
5. How are integrations managed?
 1. System to system
 2. iPaaS
6. How are analytics developed?
7. What are AI expectations (business and member)?

We Need a New AMS: Vendor



Talent and knowledge left

Experienced staff were cut, and the institutional knowledge they carried walked out the door with them.



Support eroded

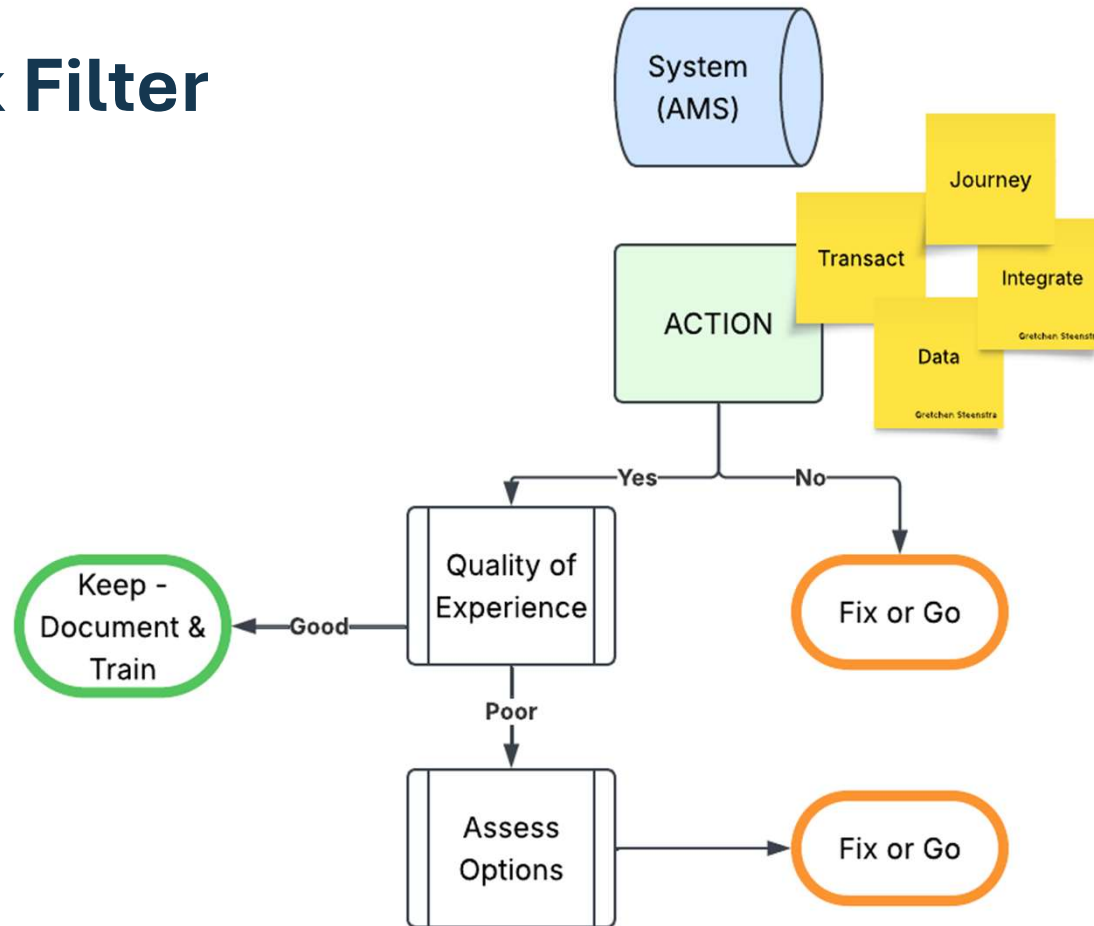
Associations were left with systems that are harder to trust, harder to evolve, and harder to love.



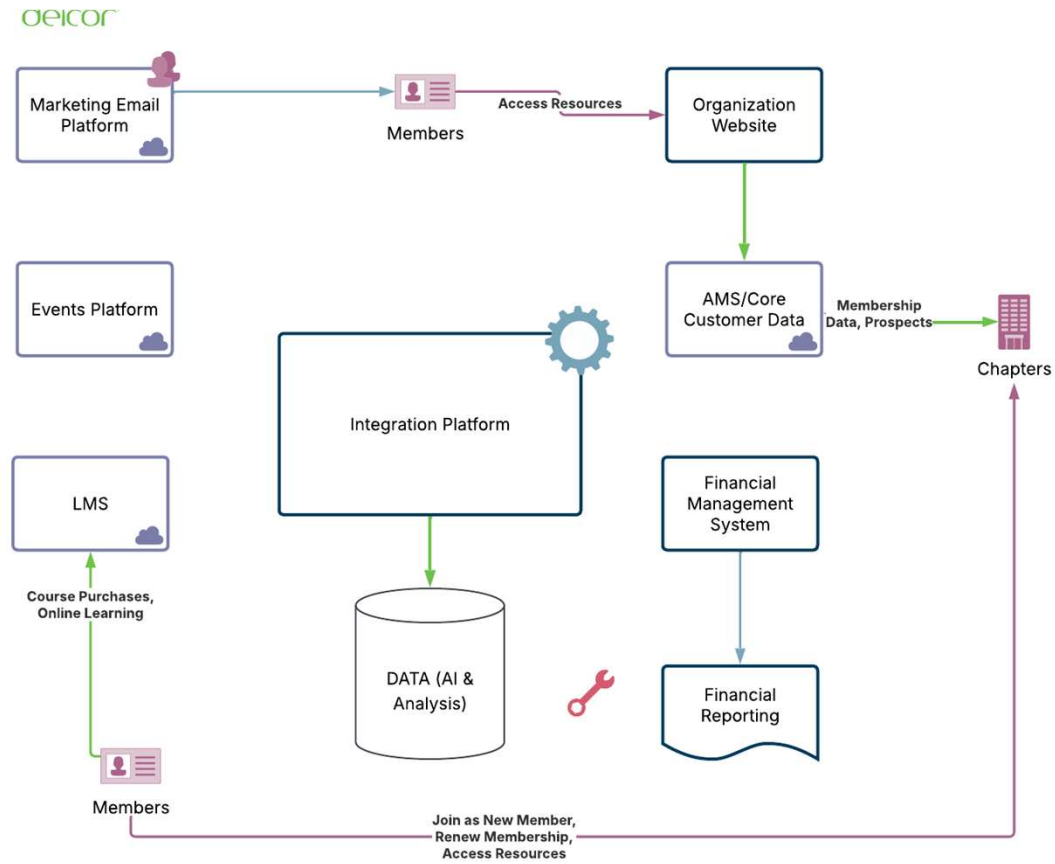
Costs stayed high

Many organizations still pay six figures, sometimes much more, for that experience.

Feedback Filter



Ecosystem



Data and Governance: Own It

Bad data can make a good AMS look broken.

Ask

Which data is wrong?

Who owns fixes?

Are business rules documented?

Can reports be trusted?

Are integrations creating conflicts?

Consider

Data cleanup can be less expensive than replacement.

A conversion will not magically fix unclear rules.

Governance gaps often follow you into the next AMS.

Decision clue

Stay if the platform supports the rules and the problem is trust/ownership.

Go if the platform cannot model what the organization must do.

Pick a Lane

STAY

- Focus on key features & functions
- Talk to Partners

INVEST

- Goals to educate vendor
- Talk to your vendor partner about their roadmap – how does it support your association?
- Talk to implementation partners

GO

- Preview vendors
- Meet implementation partners

AMS Solutions

What system do you REALLY need?



AMS vs CRM

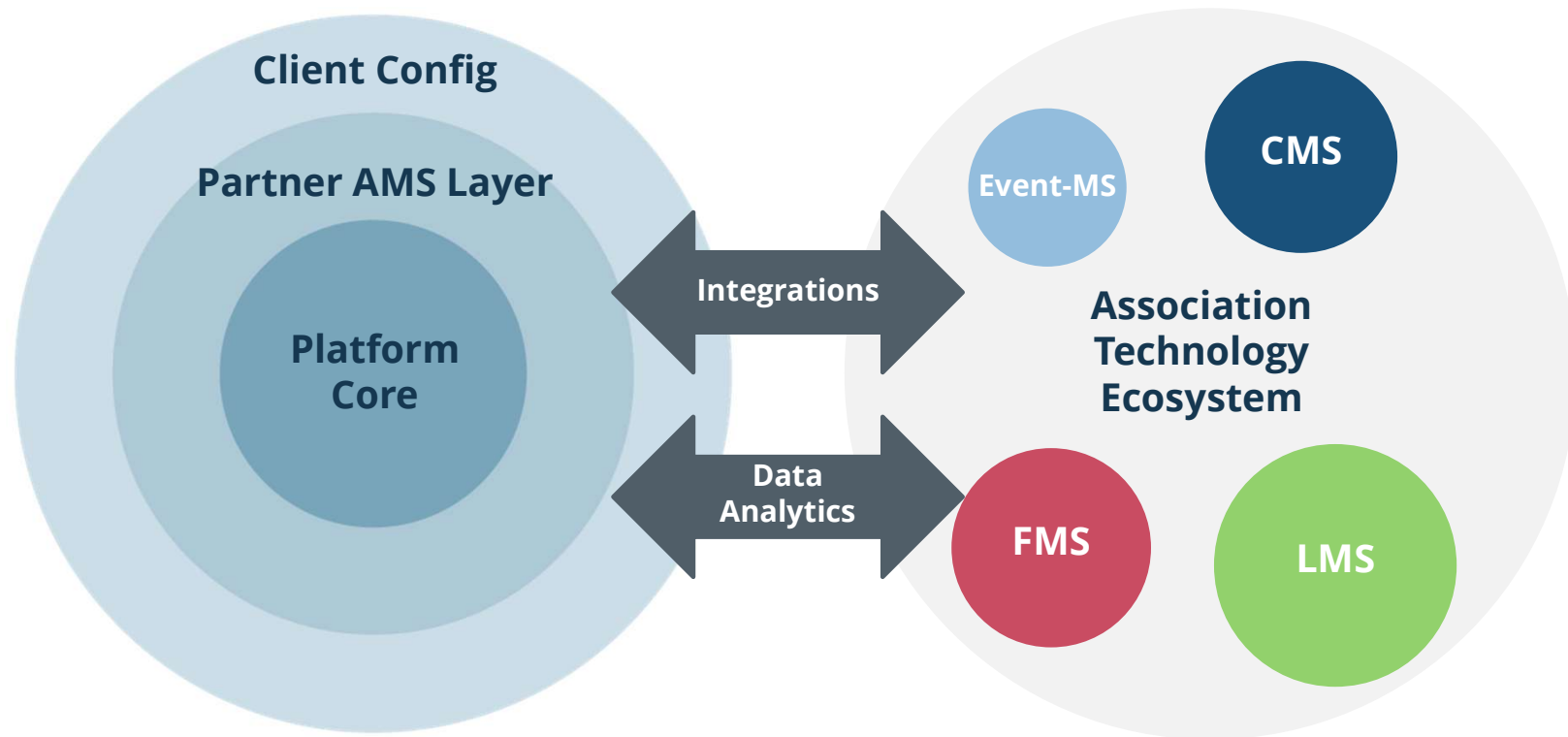
Function (Sample)	AMS	AMS/CRM Blend	Enterprise CRM + Apps
Customer Management	✓	✓	✓
Awards	✓	✓	Integrate with App
Chapters	✓	✓	Integrate with App
Committees	✓	✓	✓
E-Commerce	✓	✓	Integrate with App
Events	✓	✓	Integrate with App
Finance	✓	✓	Integrate with App
Membership	✓	✓	Advanced Config
Products	✓	✓	Integrate with App



AMS/CRM Feature Compare

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	Awards
Services	
MyAccount/E-Commerce	
Data (reporting/analysis)	
Integration & Partnerships	

Relationships: System, Vendor, and Association



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

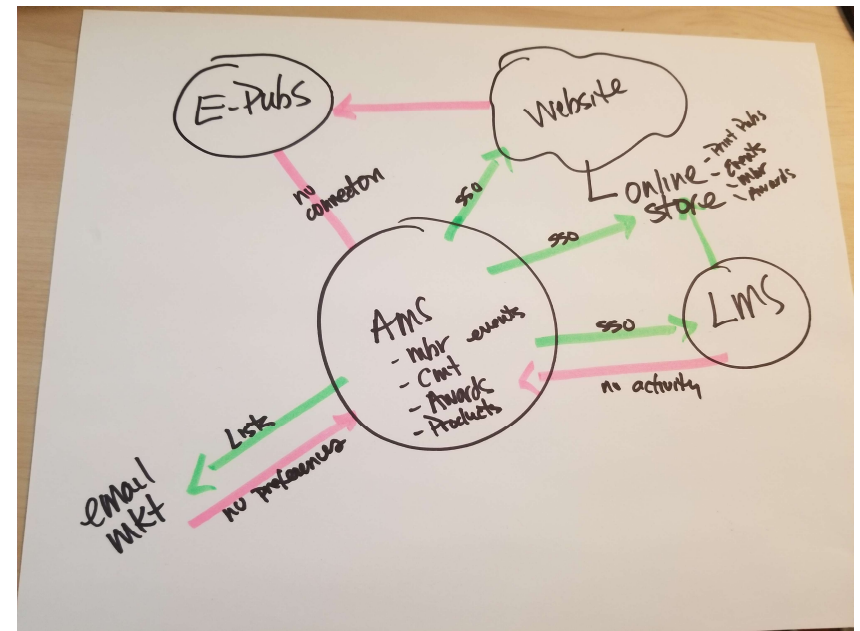


Ecosystem: Draw Your Ecosystem (Screen Break)

Include if:

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

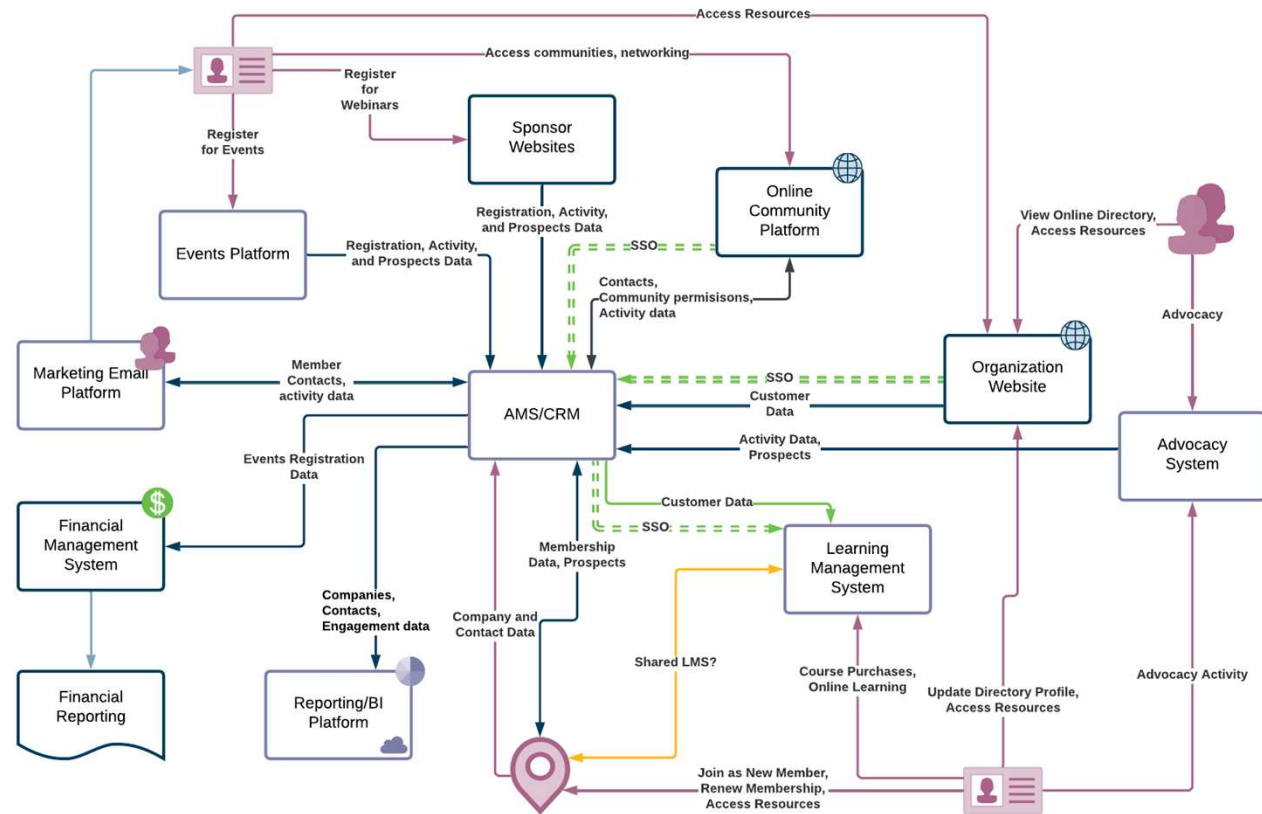
OTHERWISE, **leave it behind** or integrate!



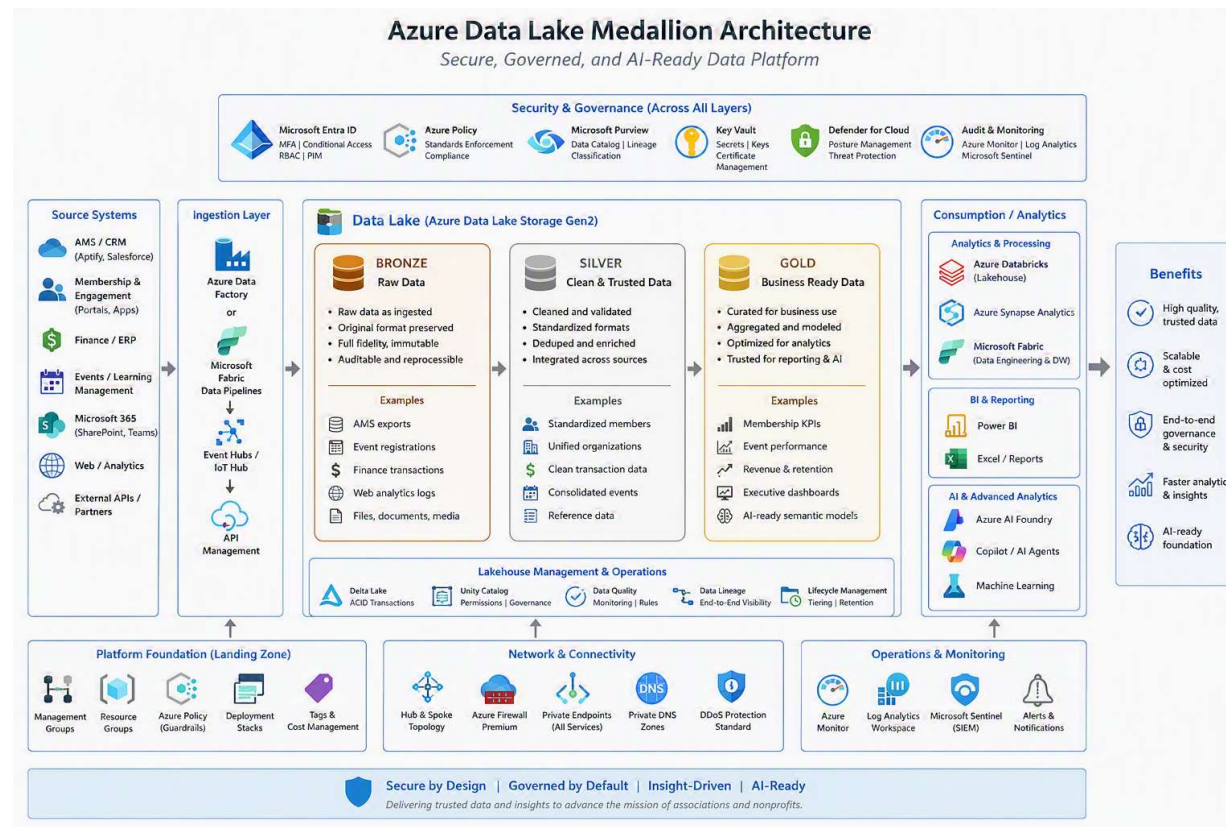
Ecosystem – Business System

SAMPLE

Future State Ecosystem Diagram



Ecosystem – Data: Who has CONTROL of the lake?



GS1

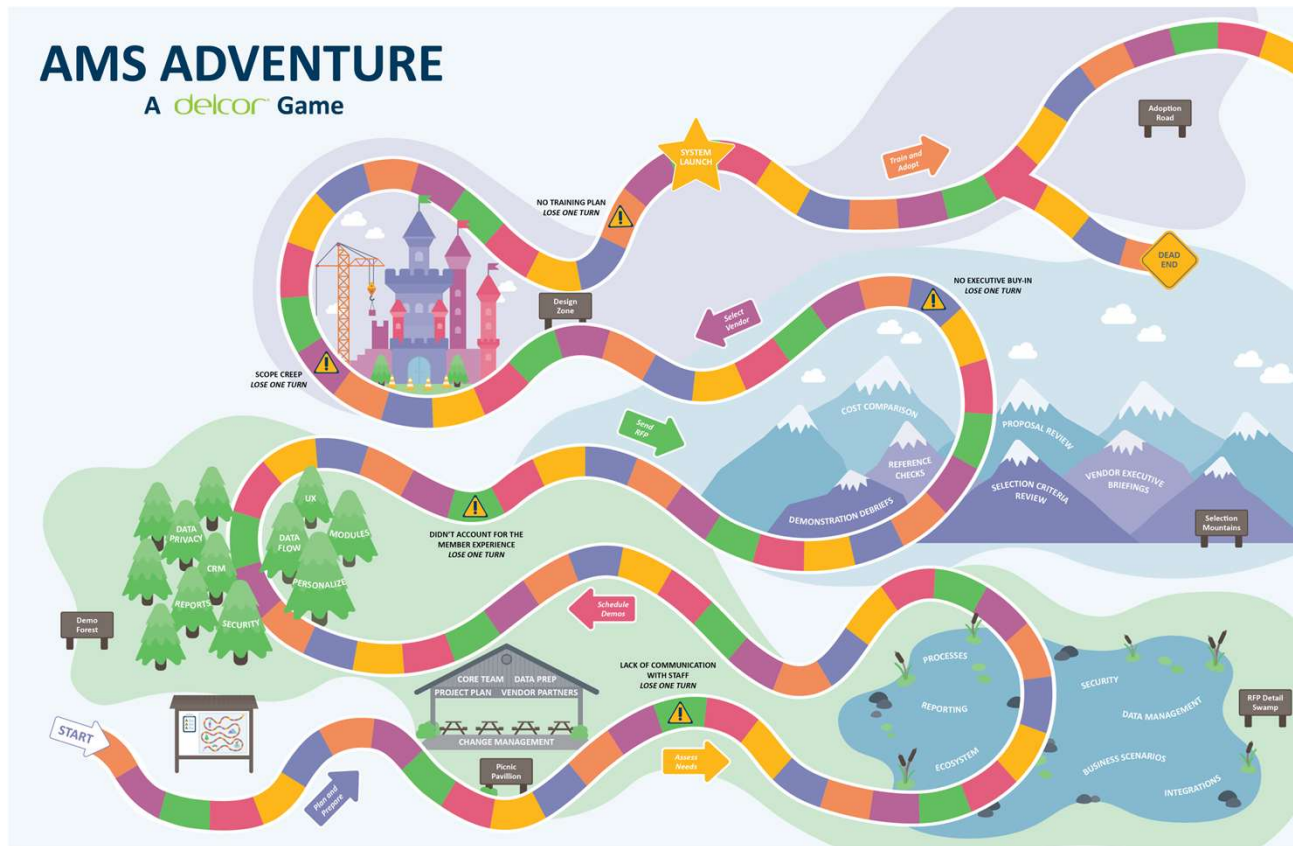
Slide 25

GS1

Make a better slide w/Richard of the center and edges.

Gretchen Steenstra, 2026-09-14T18:24:30.254

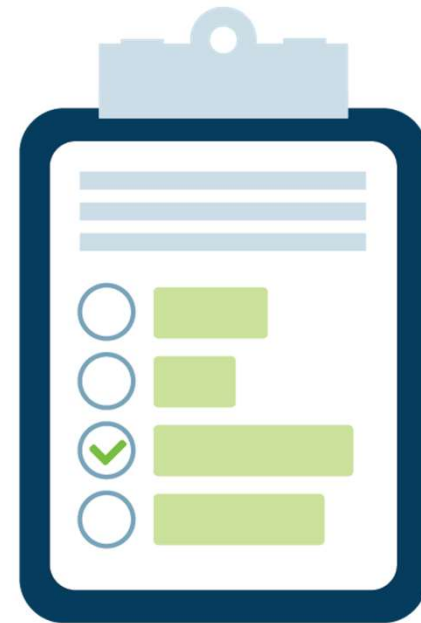
AMS Adventure: A DelCor Game



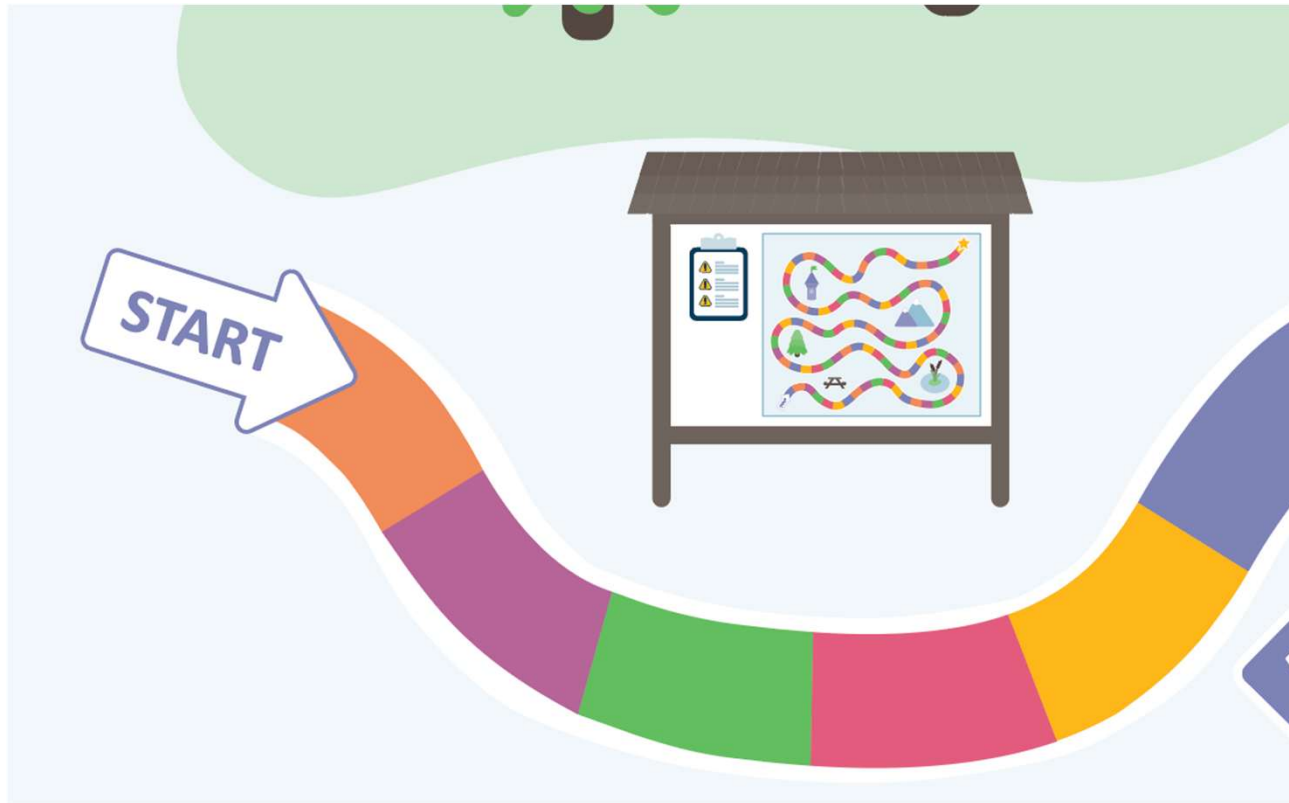
Poll

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?

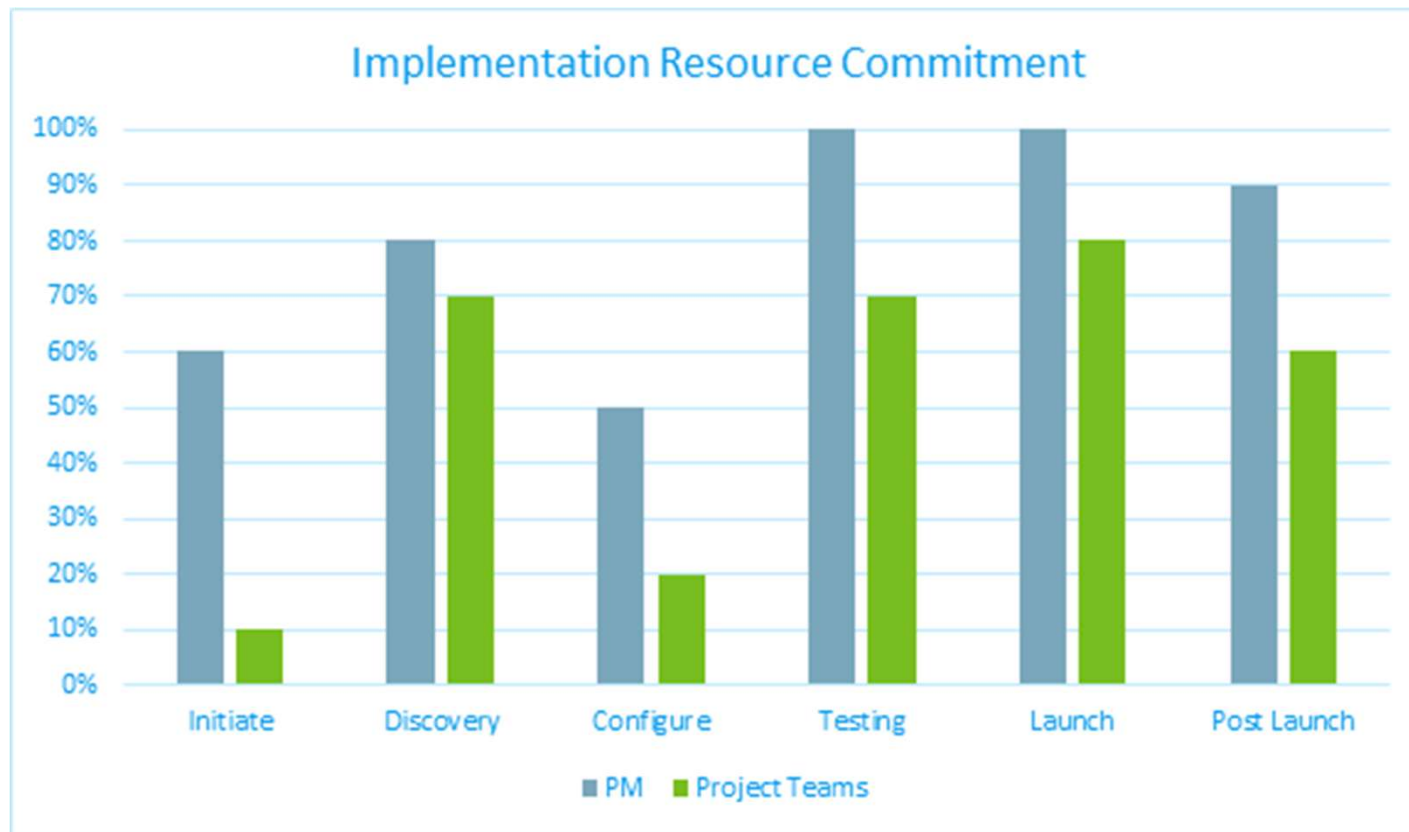
- Decision maker
- Business owners
- Finance
- Marketing/communication
- Customer service



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

Roles and Resources: Implementation



Lack of Communication

Lose a turn!

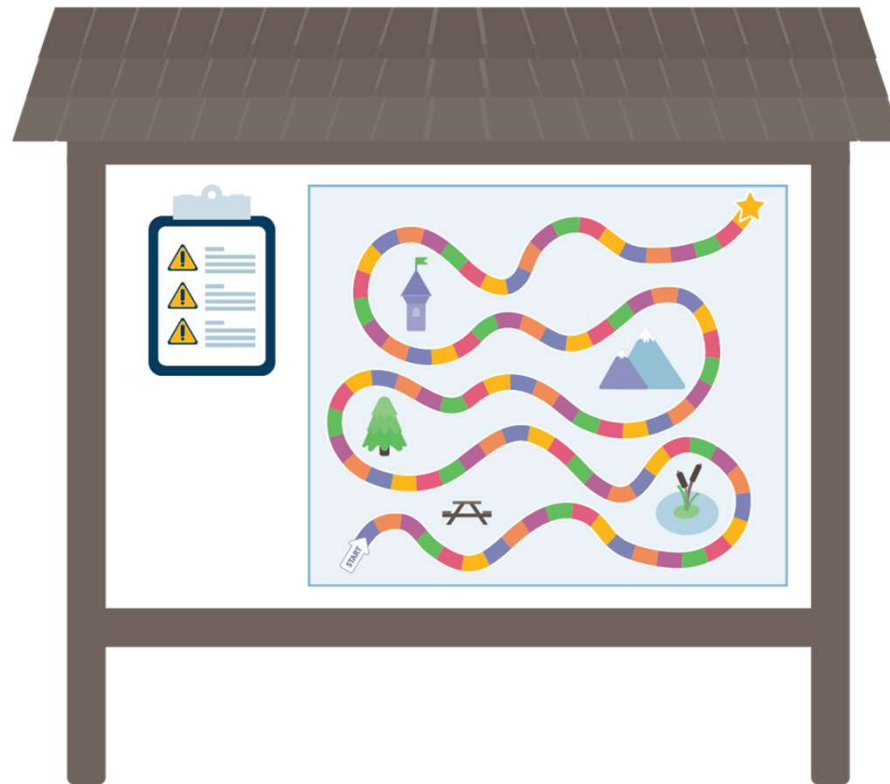




Communication: Internal and External

- 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



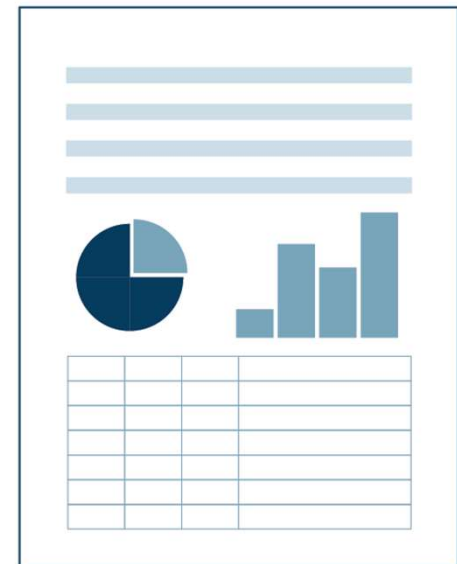
Section Break: RFP Swamp



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

Can AI do this for me?



Rely on a select expert to align functions, culture and fit

Project	Difficulty Level	Consider
Develop Requirements	Med – do you have the data?	-Depends on your data quality and interaction. -Record and Diagram with AI
Create RFP	High – limited data	RFP's include organization goals, future needs, gaps in current processes and functions and directions for vendors.
Identify Vendors	High – more than 1 and 0	Vendor identification is an art and a science.
Create Demo Agenda	Low – build the base	
Evaluate Proposals	Med – help compare and evaluate	AI tools help compare proposals and identify gaps.
Build an AMS or system from scratch	EXTRA HIGH – technically possible	Invest in tools to augment your systems. Starting from scratch is difficult for the average person.

Requirements Section





Identify Changes – Be Specific

-  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**

Where Do You Find Requirements?

**Standard Operating
Procedures (SOP)**

**Tribal
Knowledge**

**Organizational
Goals**

**Member/Customer
Needs and
Processes**

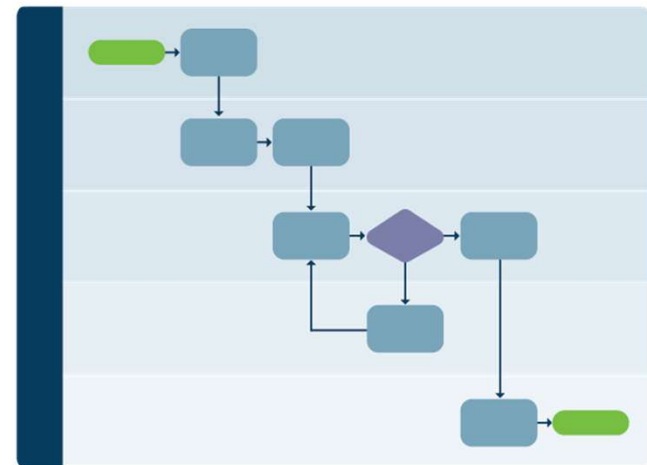
**Staff Needs and
Processes**

Business and Processes: Just Enough Detail

BUSINESS processes

VS

business 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 is intuitive = Required
5. AI 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

Integration Requirements

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



AI & Automation Requirements

- Every system says the offer both. Consider the following questions:
 1. **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 AI **model**?
 2. What **tool** is used (e.g. OpenAI, 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?

Goals and Requirements from Each Business

- Define goals and outcomes for each business area
 - Membership, Customer Service, Finance, Technology
- Create sample workflow
- Refine future state ecosystem diagram
- Define data

What else is missing?

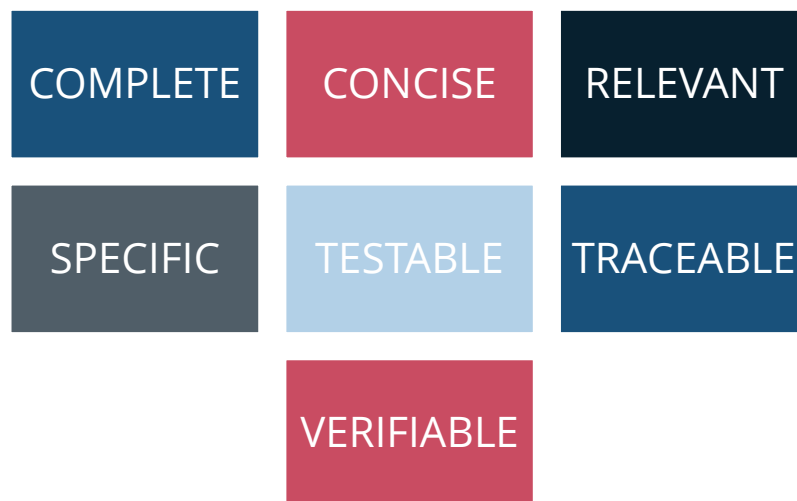




Tell Your Story (What and Why)

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	

SAMPLE: User Story/Scenario: Points of View GS1

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.

Slide 51

GS1 ADD slide for the screen w/an example
Gretchen Steenstra, 2026-09-14T18:09:48.591



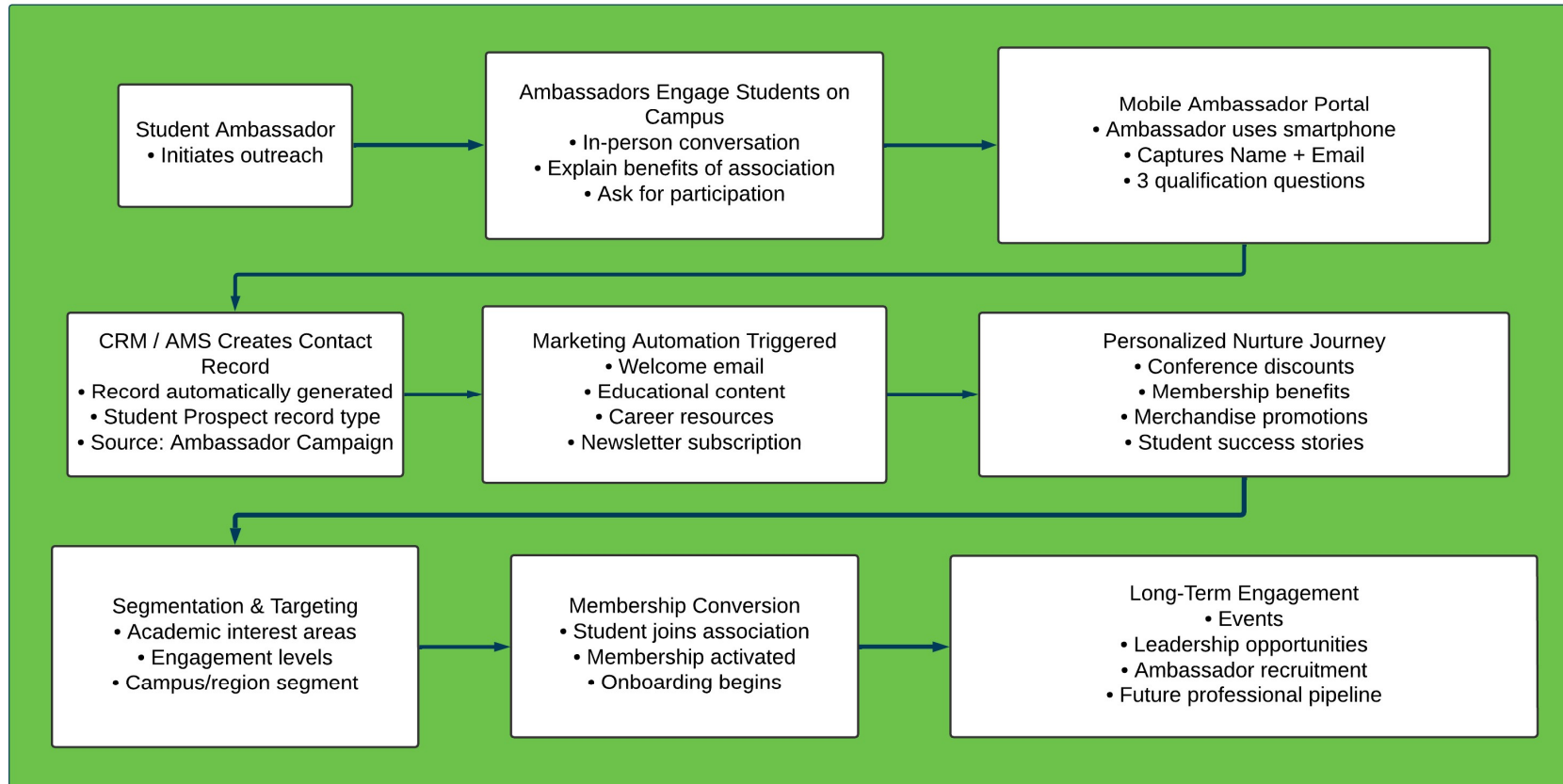
SAMPLE: Goal and Outcome

Goal: Increase Student Membership & Engagement

Outcomes	KPI	Department	Ideas
Increase student membership.	Incentives for key membership groups	Membership Development	Provide discounts to students who join or free conference registration.
Recognize student ambassadors.	Increase leadership engagement in a meaningful way.	Governance and Leadership	Encourage student ambassadors to reach out to nonmember students
Create a plan to engage those at risk of not renewing.	Identify members at risk of not renewing.	Membership Development	Leverage AI/BI tools to analyze trends across systems to create a plan for reengagement.

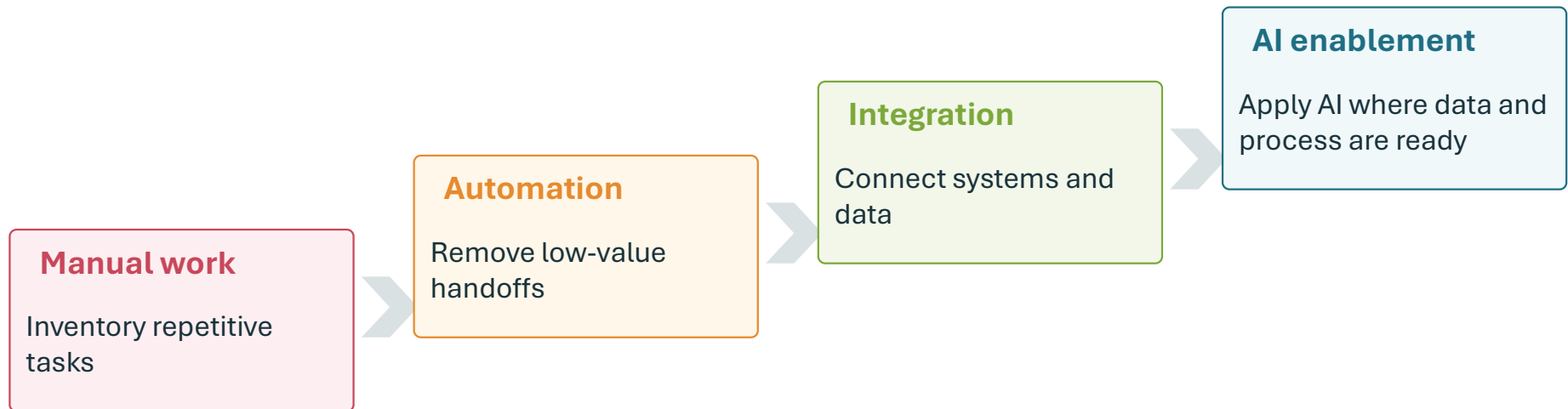
How do you connect your orgs goals and business objectives to the work you do?

Workflow: Increase Student Membership



Outcomes

Improving Student Membership: Who are the business users who are part of this new workflow?



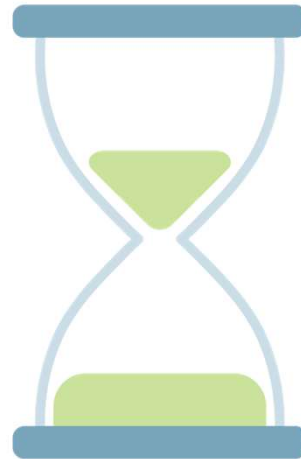
Vendor conversation: “What automation capabilities are we not using today, and what is actually on your AI roadmap?”



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, analysis and AI?
- Do you need to add context? Vendors don't know all the facts!

10 Minutes...GO!





EXERCISE: Integration Case Scenario

1. 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. Discuss with participants
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/AI?
- 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

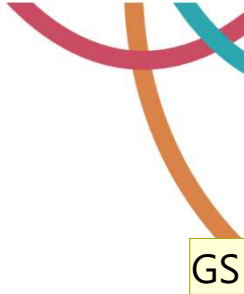




REMINDER: Vendor Discovery Phase

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

Slide 62

GS1 [@Kelsey O'Connell] can you update the RFP handout to match the new list here?

Gretchen Steenstra, 2025-11-05T23:41:39.283

KO1 0 Yes, I updated this sheet with tracked changes:

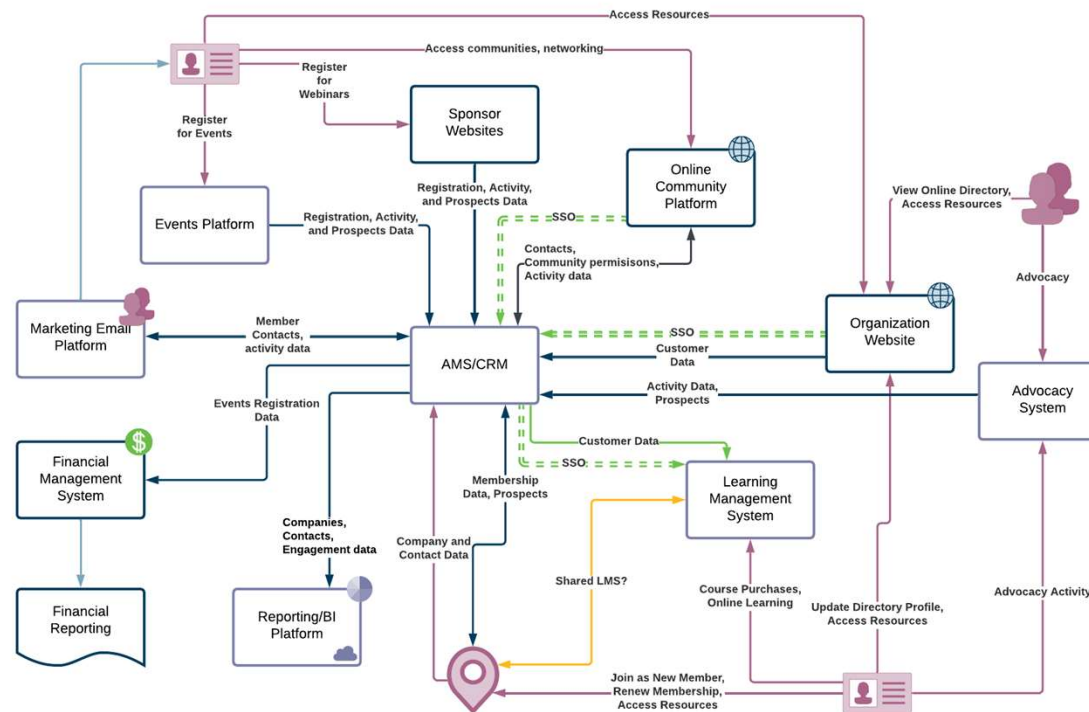
<https://delcor.sharepoint.com/:w:/r/sites/Mar/Shared%20Documents/Presentations/Industry%20Presentations/Sy>

Kelsey O'Connell, 2025-11-06T16:19:55.355

RFP: Add Ecosystem Diagrams (Focus on the Future)

SAMPLE

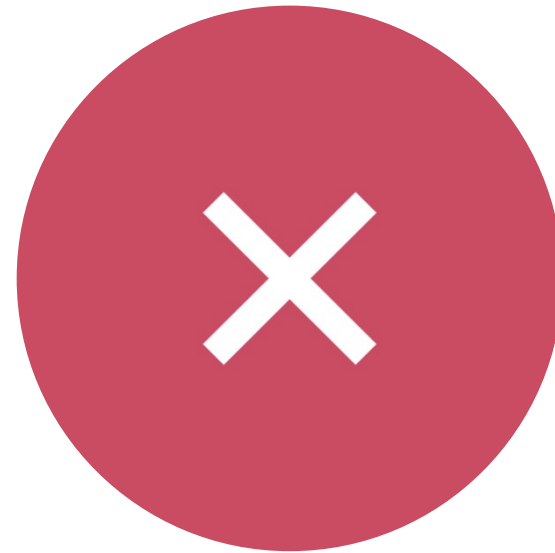
Future State Ecosystem Diagram



Release the RFP?



TRUE

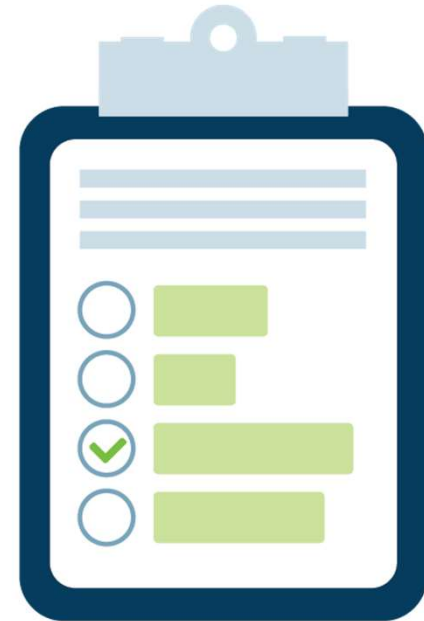


FALSE

Poll

How many vendors should I consider?

- A. 8
- B. 2
- C. 5
- D. 3
- E. All the above (18)



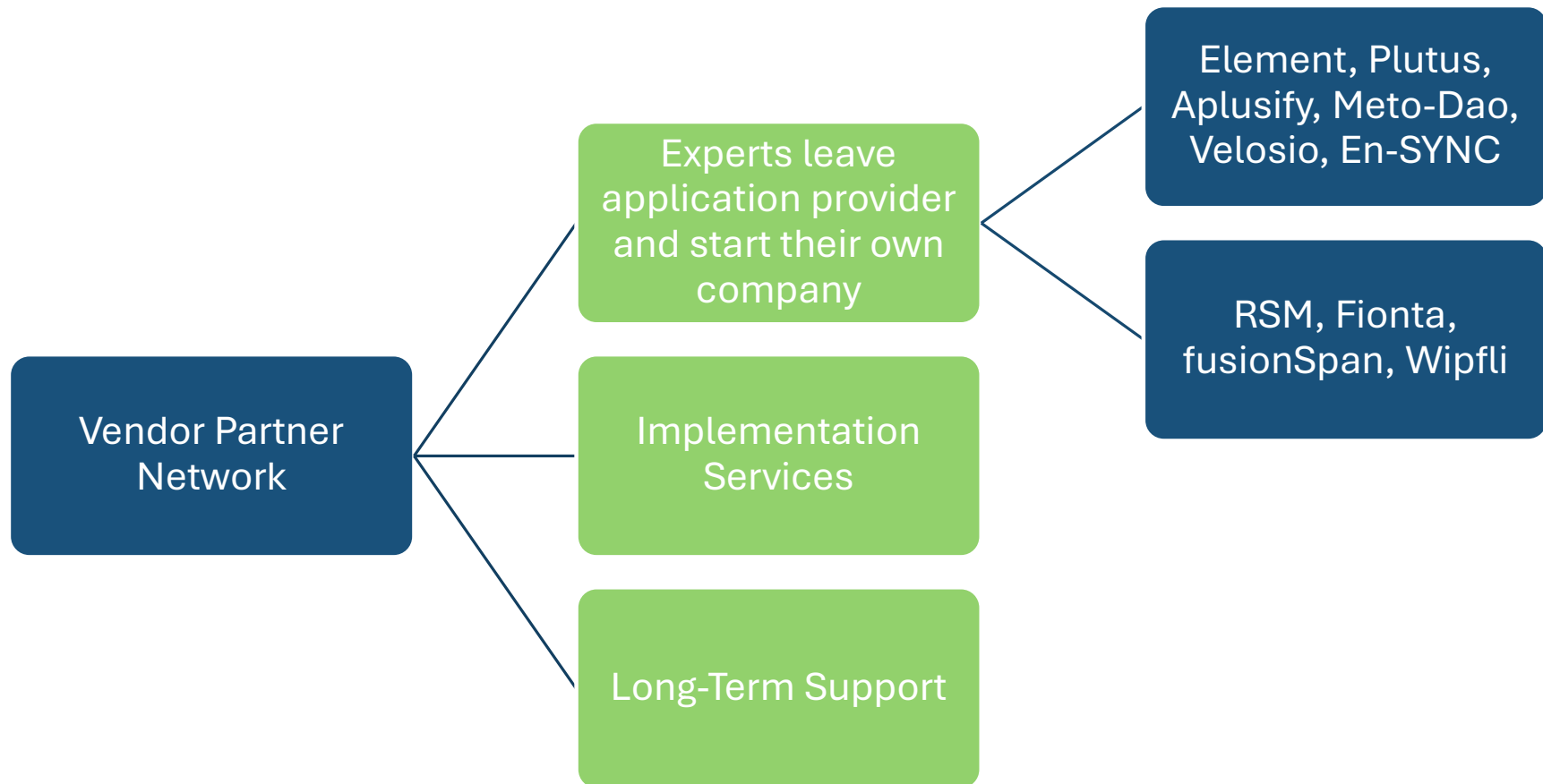
Vendors: Talk to Them!

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

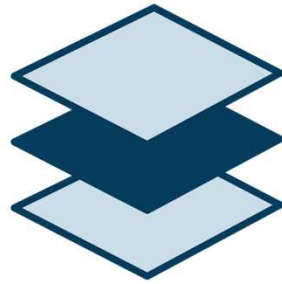


Selection Criteria: Highlights



Functional Requirements

Customer-Facing
e-Commerce
Exports



Platform and Services

Integrations
Partners



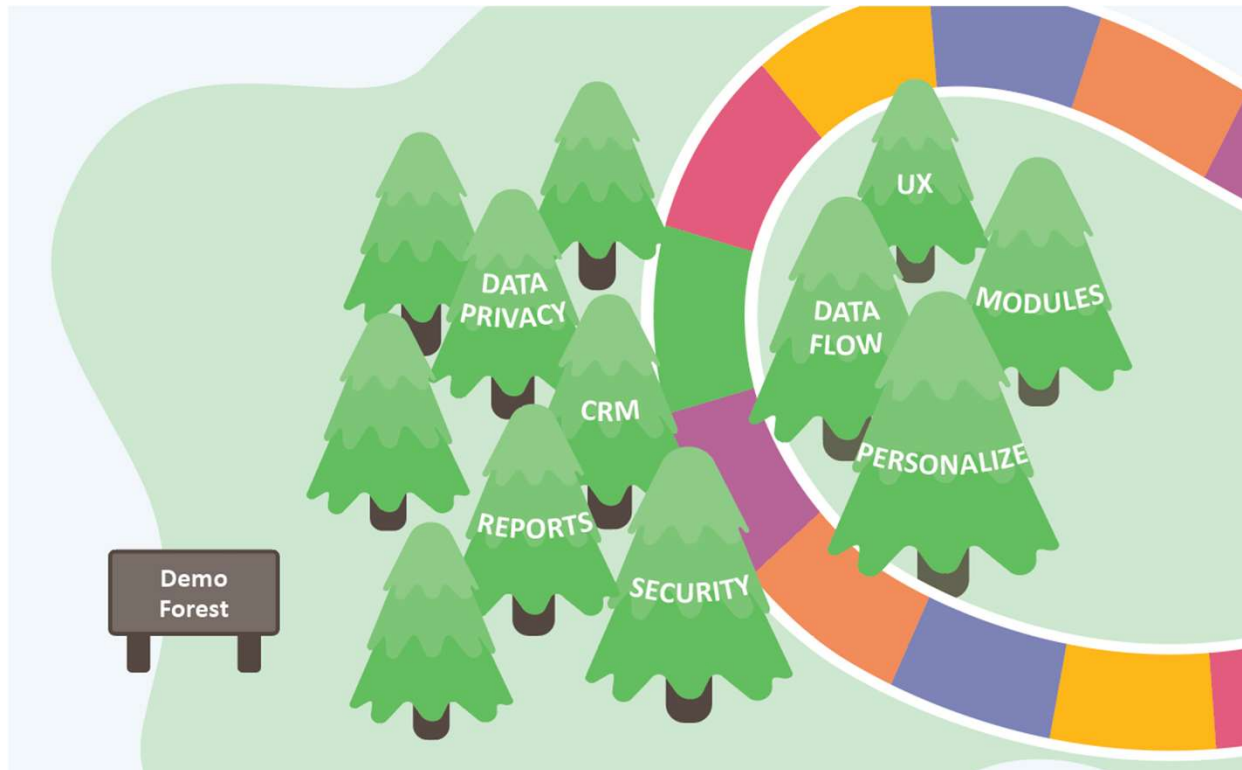
Cost Requirements

Licensing
Implementation



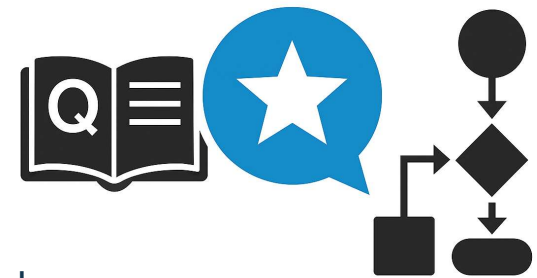
Vendor Requirements

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

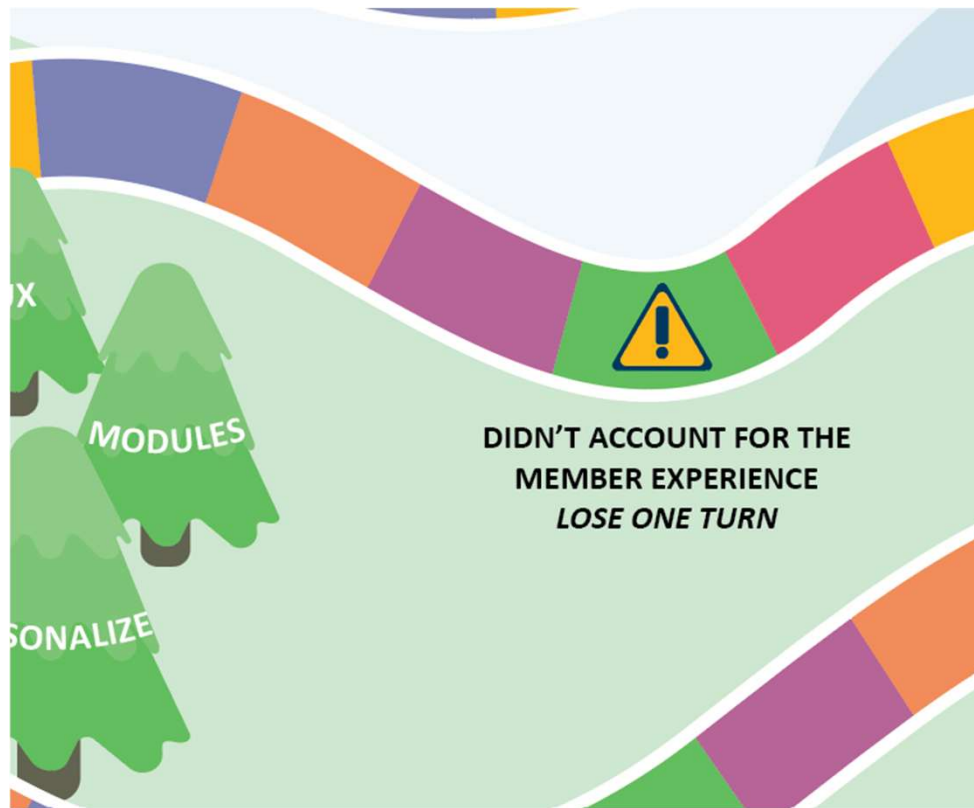


Demos: Agenda Topics

- 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 GS1

- **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
 - 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

GS1

Fix formatting

Gretchen Steenstra, 2026-09-14T18:13:42.540



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)

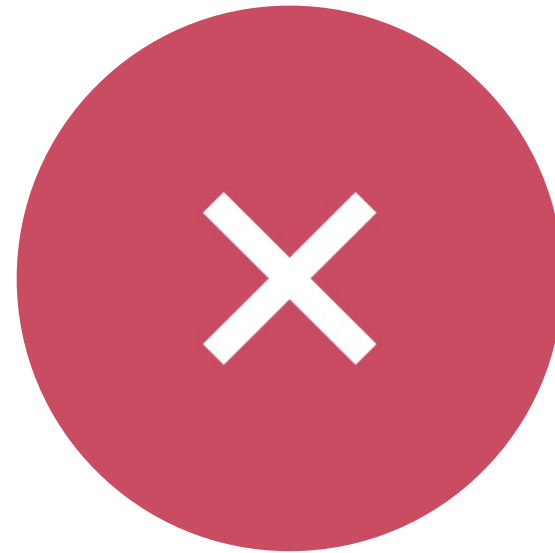
Debrief Immediately

- 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?



YES

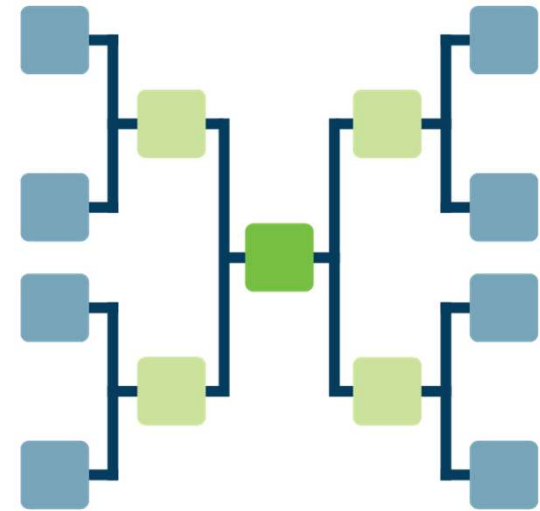


NO

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.



Send RFP and Ask for a Proposal

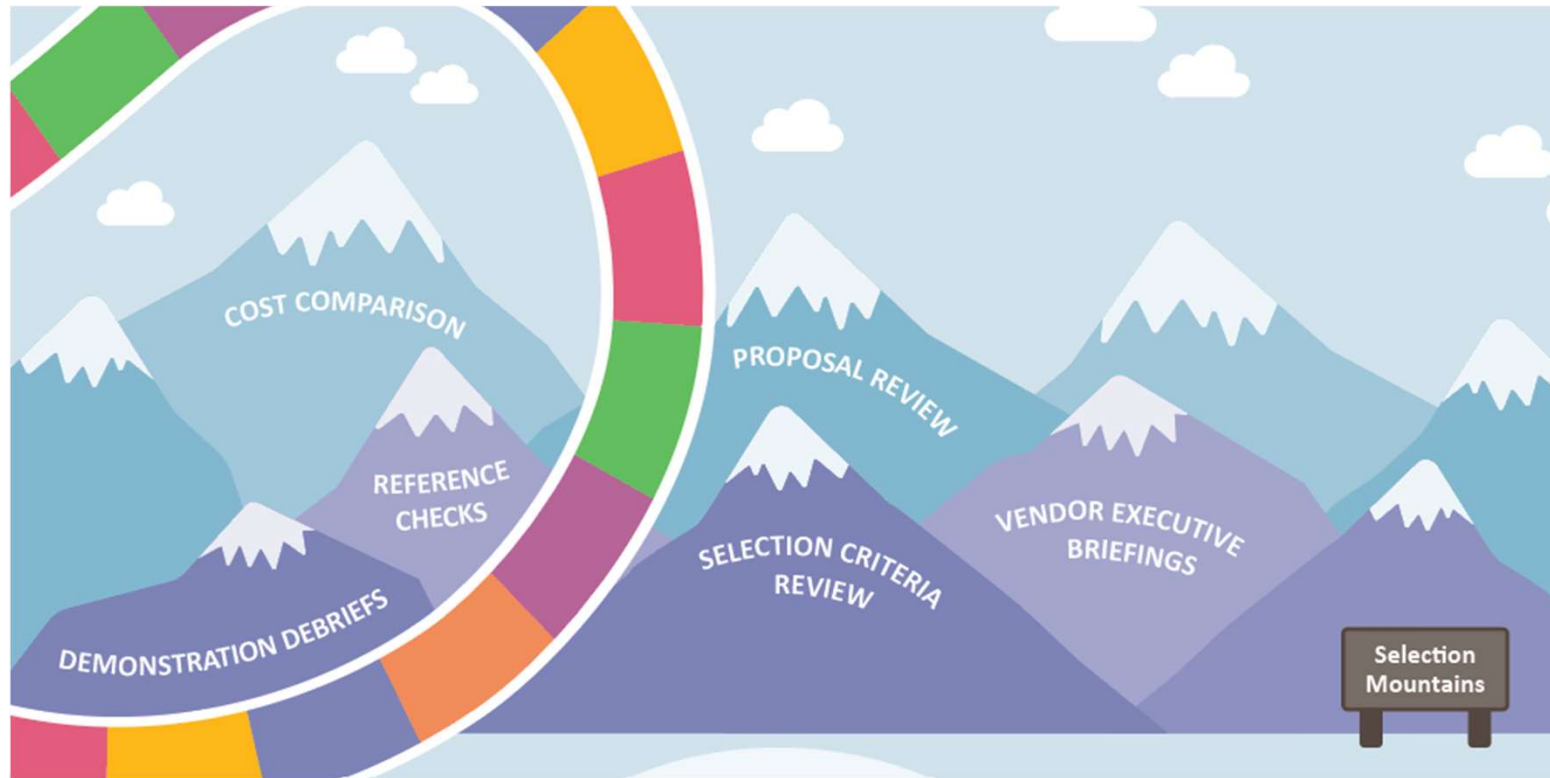


Release the RFP and then...

- 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) GS1
 - Hosting (include back up, security, SOC2 compliance statement)
 - Implementation

Slide 81

GS1

Add to iceberg

Gretchen Steenstra, 2026-09-14T18:14:29.337

Full Cost

- Licensing
- Integration (fee + support)
- Usage Fees (AI, Data)
- Customer Engagement
- Staff Time
- Adoption Effort

- 
- The diagram features a light blue background with a white iceberg floating in the water. The iceberg is divided into two sections: a smaller, visible tip above the water line and a much larger, submerged portion below the water line. The submerged portion is shaded in a darker blue, representing hidden costs. The visible tip contains a list of four items, while the submerged portion contains a list of ten items. The water surface is indicated by a horizontal line.
- Licensing
 - Implementation fees
 - Vendor services
 - Current contract expiration
 - Change management
 - Data cleanup
 - Hosting
 - Integrations
 - Licensing apps/partners
 - Process redesign
 - Sandboxes
 - Training
 - Staff time
 - Usage fees

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

	A	B
	✓	✓
	✓	—
	—	✓
	✓	✓

Vendor: Functionality

- Goals
 - Align goals with system functions
 - Walk through the ecosystem diagram
 - Review requirements for each department
 - Membership, Customer Service, Finance, Technology
 - Identify integration/connection points
 - Discuss optimization options
- Vendor Suggestions
 - Upgrade
 - Reconfigure
 - Adjust partners



What techniques do you use to get to the facts?



Vendor Solution/Partnership Scorecard

Criteria	What to Verify with the Vendor	Score (1–5)	Evidence Source
Functional Fit	Can the system meet our documented requirements today, without custom work?		Requirements walkthrough, demo against our workflows
Roadmap Credibility	Is what we need on the roadmap, with dates and a track record of delivery?		Published roadmap, last 3 releases delivered
Support and Service	Are issues resolved at the promised speed and quality?		Ticket history, response times, escalation outcomes
Staff and Continuity	Is our account team stable and knowledgeable about our configuration?		Turnover on our account, depth of institutional knowledge
Integration and Ecosystem	Do they support our other systems without fees at every connection?		Integration list, iPaaS support, per-connection charges
AI and Automation	What automation are we not using, and what is actually shipping?		Feature inventory vs. usage, AI roadmap commitments
Total Cost	Is the full cost defensible over the contract term?		Licensing, services, usage fees, integration and staff time
Partnership Behavior	Do they bring us solutions, or wait for us to solve it?		Business reviews, proactive recommendations, renewal conduct

Scoring key: 1–2 = the vendor cannot or will not close the gap · 3 = fixable with a documented commitment and a date · 4–5 = the partnership is working. Bring the problem, not the solution — let the vendor answer.



AMS Scorecard

Lens	Key Question	Score (1–5)	Evidence to Gather
Strategy	Will the AMS support the next 3–5 years of goals, KPIs, and growth?		Roadmap fit, growth plans, integration needs
Data	Do staff trust the data?		Known defects, duplicates, dues rules, reports
Operations	Are processes clear, or are workarounds required?		Workflow maps, manual work, training gaps
Governance	Are business rules documented and owned?		Ownership, decision rights, data stewardship
Member Journey	Can members join, renew, and register without help?		Completion rates, support tickets
Vendor	Is the partnership improving?		Roadmap, ticket history, escalation outcomes
Total Cost	Is the full cost of staying defensible?		Licensing, integrations, usage fees, staff time

Scoring key: 1–2 = the platform cannot meet the need (go) · 3 = fixable with configuration, training, or governance (stay and fix) · 4–5 = working as needed (stay and optimize)

AI Influence on the Decision

The decision to replace an AMS must extend beyond a single system and focus on interoperability and AI readiness.



AI-native alternatives are emerging

New entrants offer lower implementation costs and faster deployment than the legacy SaaS model.



The system can adapt to staff and customers

Instead of forcing staff to learn rigid workflows, AI services introduce more flexible, interactive experiences.



Data must be ground truth first

Associations need a real data **governance practice**—clean, consistent, well-managed data—so AI and analytics tools produce **results staff can actually trust**.

Handout: Compare Vendors (Cost and Functionality) GS1

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					

Slide 88

GS1

Update handout with AI options

Gretchen Steenstra, 2026-09-14T18:17:16.806

Gaps and Partners

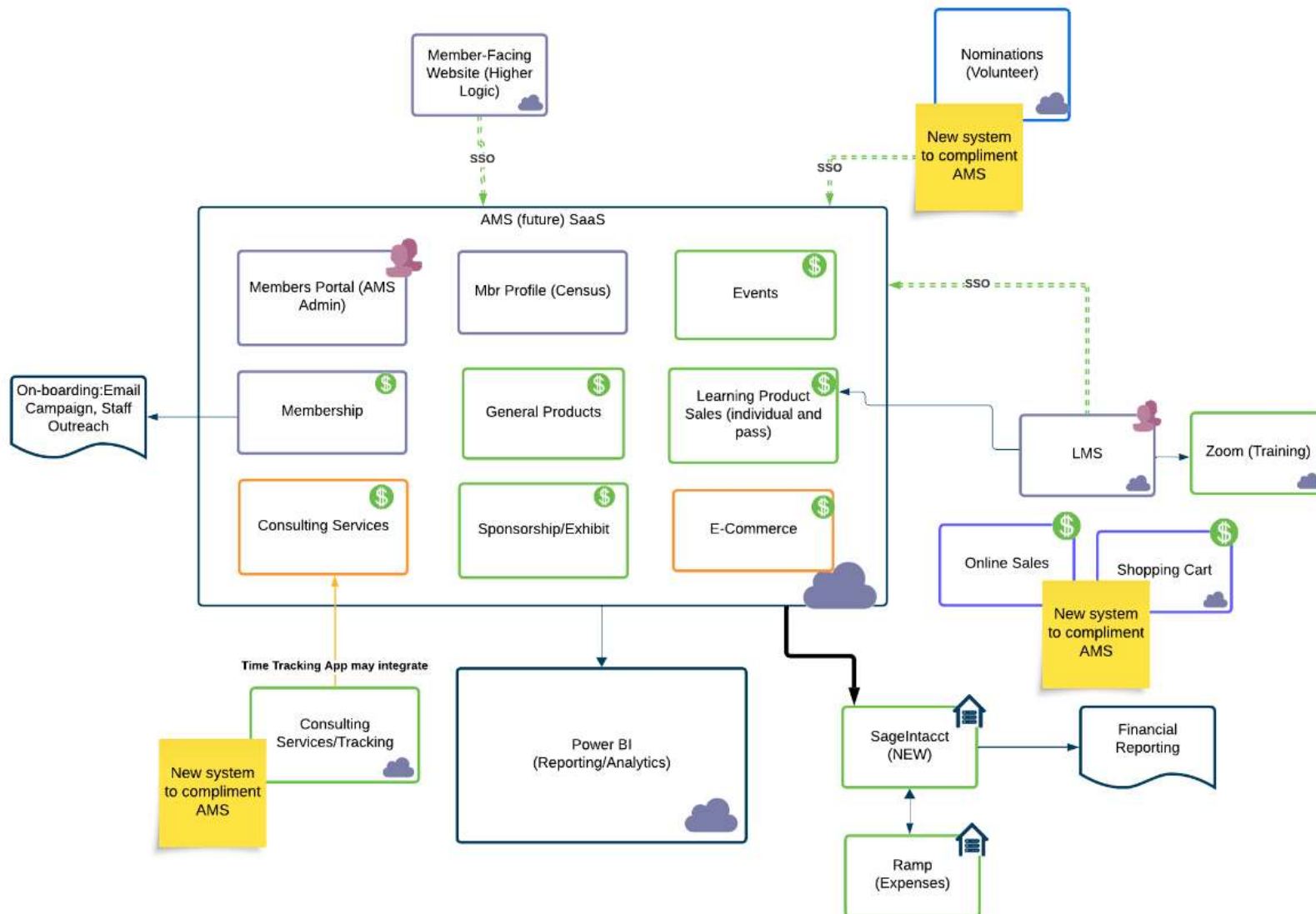
- Augment the Core Solution?
- ECOSYSTEM
 - CORE AMS as a box in the middle and typical add ons around core
 - Ecommerce
 - My Account
 - Application Evaluation with Nomination Workflow
 - Sales Management
 - Tax
 - Certification

Slide 89

GS1

@kelly - add basic partner ecosystem

Gretchen Steenstra, 2026-09-14T18:46:59.273



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

	A	B
⚙️	✓	✓
☁️	✓	—
🔍	—	✓
📊	✓	✓

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...

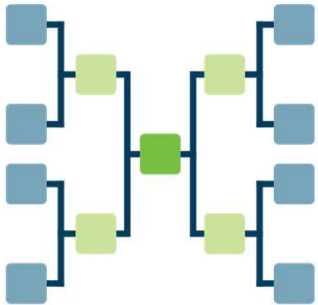
Remember...There's No Magic Wand!

- 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



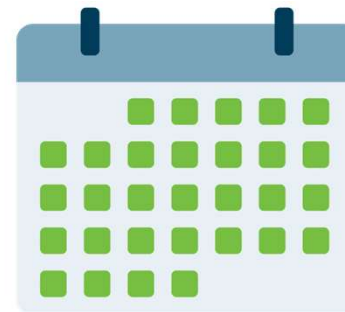
Choose the partner that is the best fit for your organization.

Plan



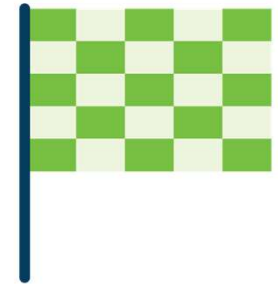
Review staff calendars and plan for the assessment.

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

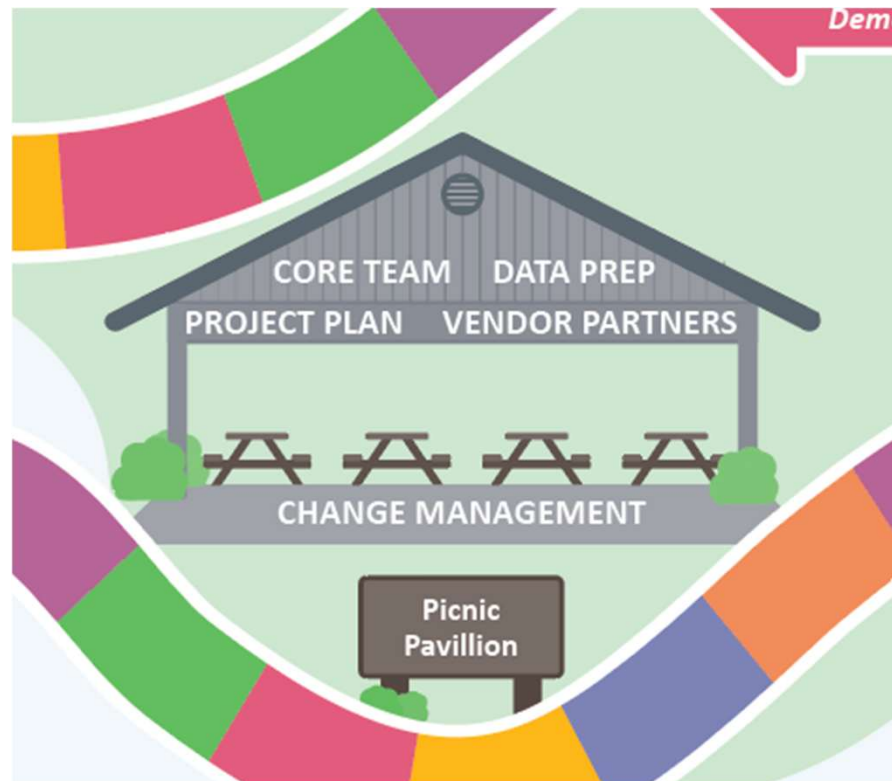
Scope Creep: Lose a Turn!



What Areas Can You Address Right Now?



Implementation Planning



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



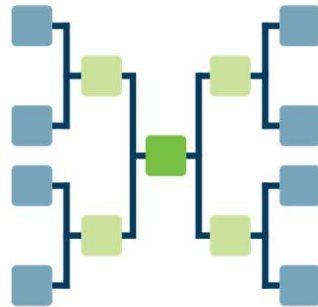
What's Next? Start Strong and Be Prepared

Plan



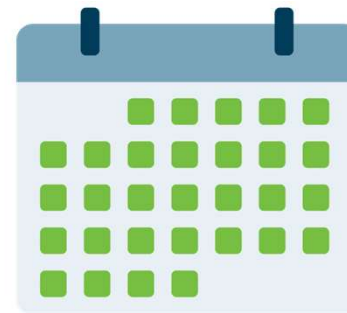
Identify your goals and align with your association's strategy

Identify System



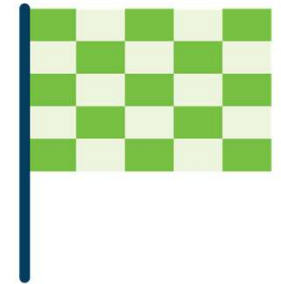
Create a business system ecosystem map

Schedule



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

Start



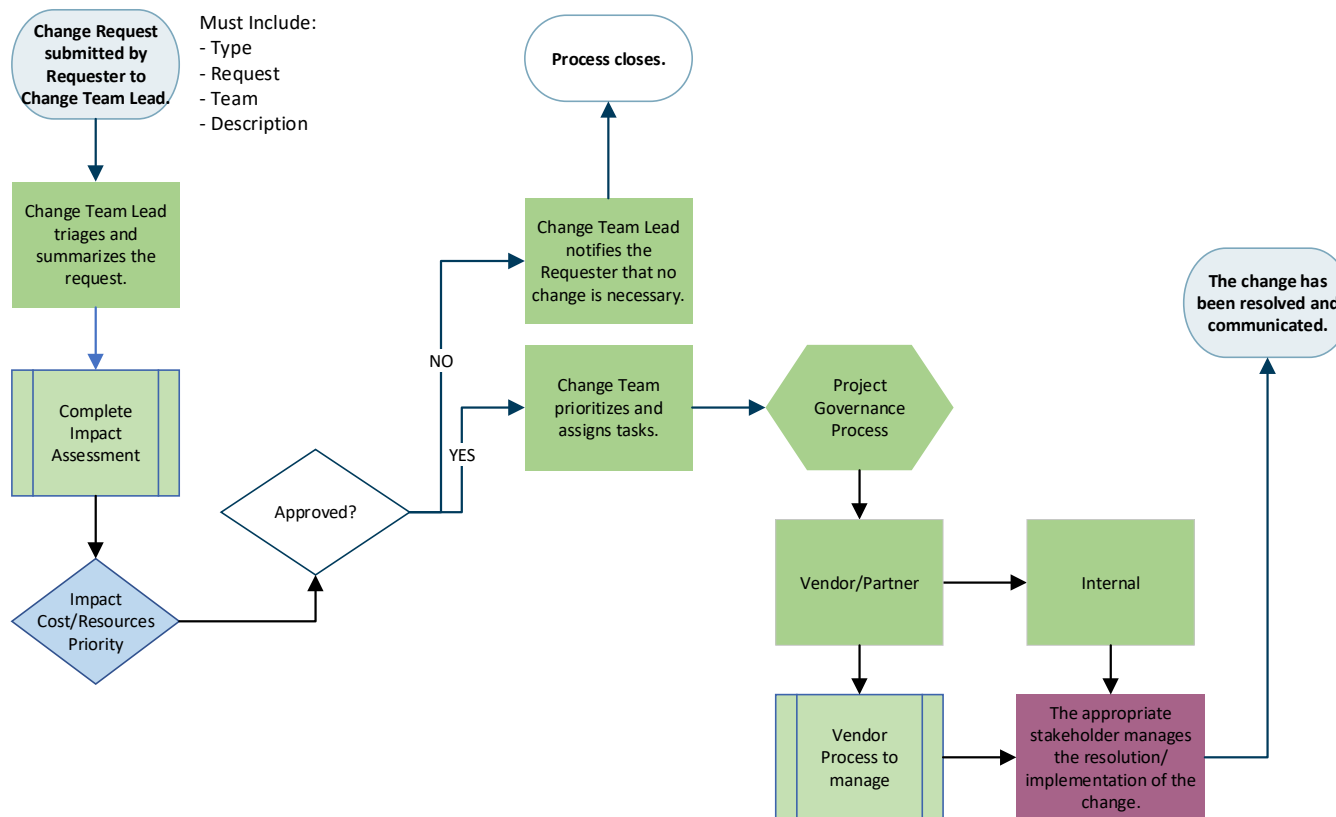
Get started!
There's never going to be a better time to start.



Core Team Tasks

1. Reset Core Team
 1. 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

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

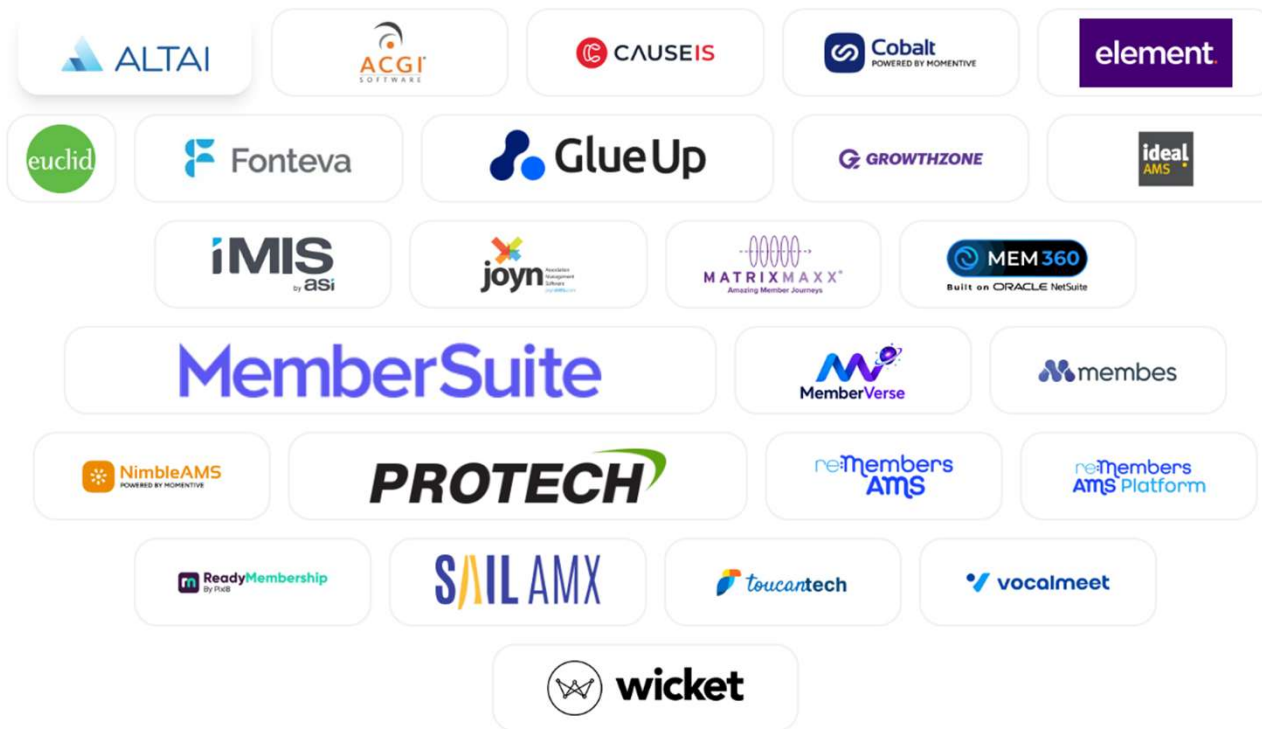
Data Inventory

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



Vendors You Should Visit at AMSFest?

2026 Showcase Companies + Demo



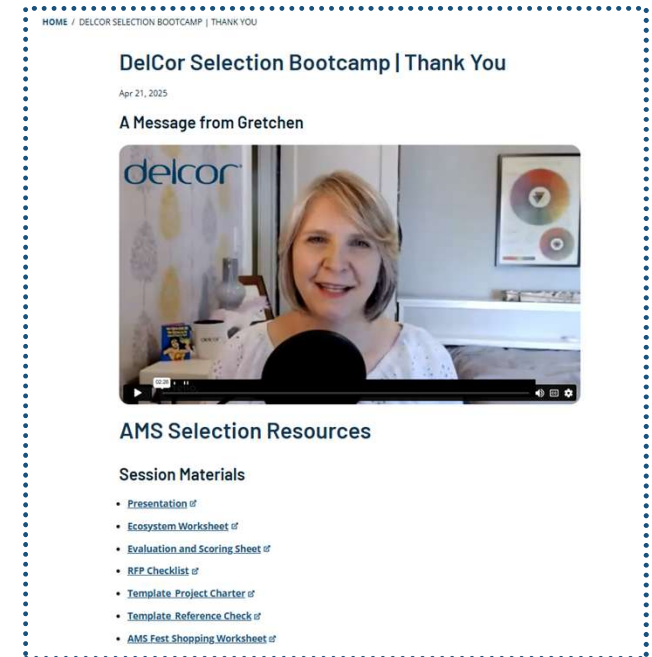
AI Tools:

- Agentforce
- Copilot/Fabric
- HL AI Tool
- MomentiveIQ
- ReadyIntelligence

Connect and Resources

Connect with a Colleague!

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

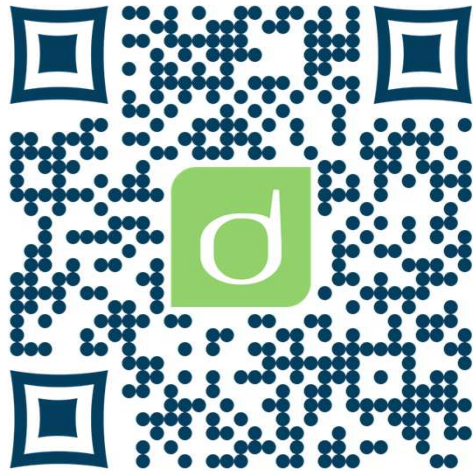


Let's Continue the Conversation

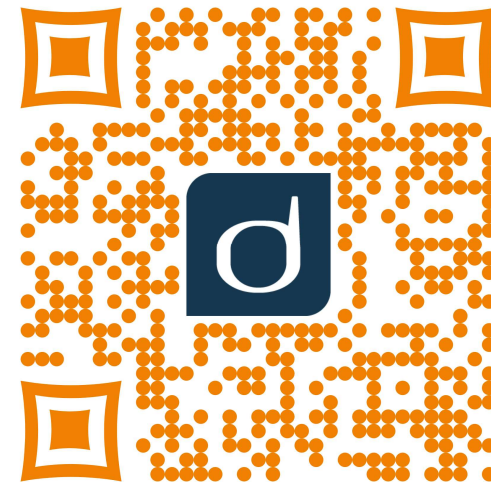
KO1

DelCor Selection
Bootcamp Resources

TH2



Additional Resources



Slide 111

KO1 Use this slide for a QR code or links to resources. Remove this slide if there are no resources.

Kelsey O'Connell, 2026-01-20T15:28:34.304

TH2 [@Connie Kim] can you please replace the QR code on the left (current one was what we used at the UST Ed session to promote registration for AMS Fest). It should go to the landing page.

Tracie Harris, 2026-09-15T12:27:25.828

Contact Us



**877-4DELCOR
301.585.4222**



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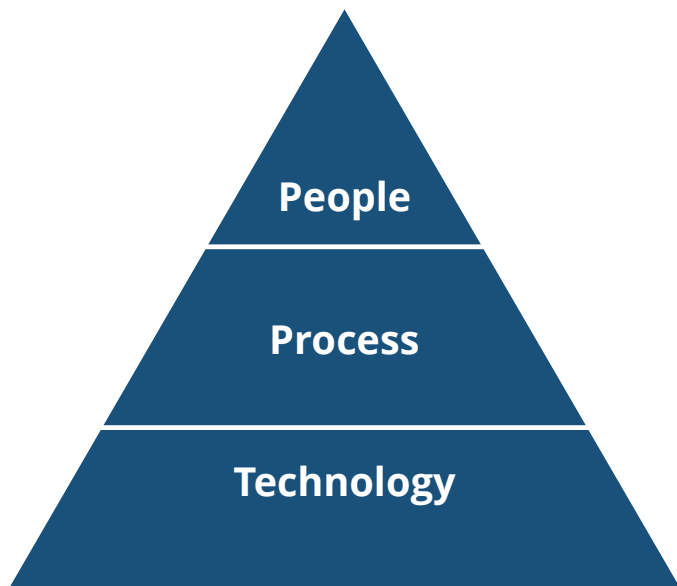
**DelCor Technology
Solutions**



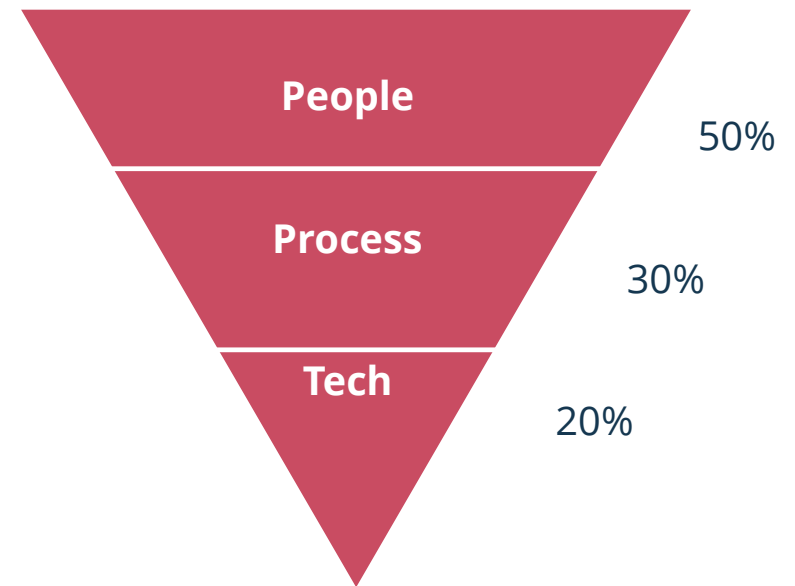
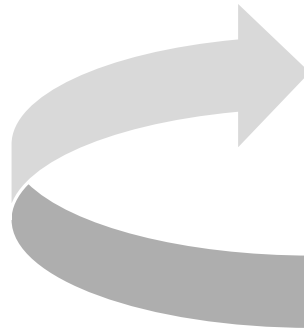
Additional Materials



Why Do Big Tech Implementations Fail



Most
Implementations



Successful
Implementations

Source: ISM Survey – US
(CRM Implementations)

Change Control vs. Change Management



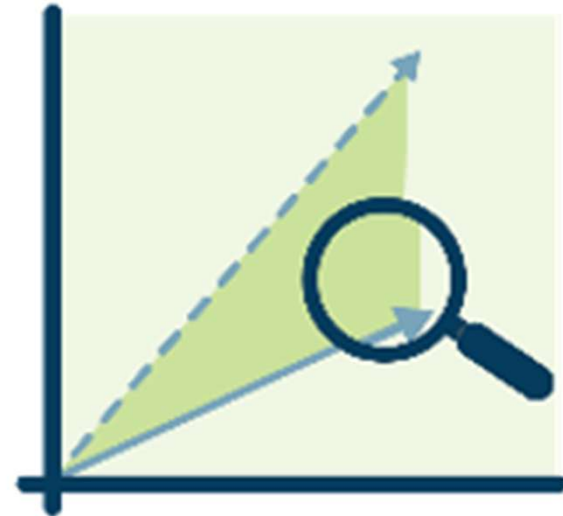
Change control is the decision to make a change, whereas change management refers to the aftermath of that decision.



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	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



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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