

**WHITEPAPER**

# SELECTING AN ASSOCIATION MANAGEMENT SYSTEM

5 Step Guide to Selecting an AMS that Meets Your Organization's Needs



## ABOUT

Selecting an association management system (AMS) can be a daunting task for organizations. With a plethora of AMS vendors to choose from these days, it's important to understand what your major needs are from the start so you can make the best vendor selection possible.

A failed software implementation can cost organizations thousands, if not millions, in wasted time and money. To ensure your AMS selection project doesn't end up a total waste, use this 5 step guide to define the scope of your AMS needs.

## 1. EVALUATE CURRENT SYSTEM

Ask users in your department what obstacles they are facing in the current system. What is it about your current software that's causing them pain or frustration in their daily tasks? In addition to their frustrations, find out what they'd like to accomplish with the new AMS software and how it would improve your organization if these aspirations were met. Make sure to list what features you do like in your current system. You don't want to lose these important features in the transition. Furthermore, make a list of 3rd party systems that would interact with the new AMS, such as your preferred financial software or e-mail marketing platform.

### Feature Evaluation Checklist:

- Issues with current system
- Features you would like in new system
- Features you like in current system and don't want to lose
- Other software that needs to interact/integrate with new software
- Features that would be nice to have, but not required
- Features you would like to have in the future, but not required for initial launch

“At some point in the AMS evaluation process, you will have to defend spending time and resources on this project to your board of directors. Solidify the project's worth with a list of benefits from all departments and levels within your organization.”

### Deployment options

Another major question to answer before choosing an AMS is how you will deploy the new system. Most major software systems are deployed either On Premise—meaning the system is physically located on the organization's premise—or as Software-as-a-Service (SaaS)—meaning the system is maintained off site by the software provider. SaaS based software is commonly referred to as “cloud-based” or “software in the cloud”. On premise software requires an onsite IT team to maintain the system but is a better option for large staff with complex processes. A SaaS solution allows access from any device with internet connection, which is perfect for small staffed organizations or organizations with employees who work in multiple locations. The costs of On Premise versus SaaS solutions are packaged very differently and vary by vendor. Make sure to factor in the fully loaded costs of both types of solutions.

Determine which deployment option is best for you by answering the following:

- How many employees need access to the system?
- Are those employees located in the same office or various locations?
- Do we have IT resources to perform maintenance on software servers?
- Do our employees need to access the system off site?

## 2. SET GOALS

Once you've evaluated your features checklist, it's time to decide what you want to achieve with a new AMS. At some point in the AMS evaluation process, you will have to defend spending time and resources on this project to your board of directors. Solidify the project's worth with a list of benefits from all departments and levels within your organization. Here are some sample questions to get you started:

- What type of information or reports do higher level executives need to make better decisions?
- Where could you eliminate paper processes and manual entry?

- What processes could you automate to save time?
- What do other departments want to improve?
- Where could you reduce revenue leakage?
- How much savings would a new software system create?

After identifying areas that can benefit from the new software system, it's time set the major goals of what you want to accomplish from the new software, including your estimated Return on Investment (ROI). By setting goals based on the features and answers to the questions above, you will better define your needs for the new software system.

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### 3. EVALUATE YOUR OPTIONS

Once your analysis is completed, it's time to see what solutions are available. Don't be afraid to consult industry experts that can help lead you through your options. Their advice can help you avoid common pitfalls and make sure you choose the best software for your organization with no surprises. Many vendors offer free demos or online presentations to gain a better understanding of how the technology works. Take advantage of these free offers when evaluating your options.

### 4. CREATE A SHORT LIST

Narrow down your options to 3 or 5 vendors that best meet your needs. Now is the time to schedule a private demo where you can ask specific questions and view parts of the system that aren't available during a general webcast or demonstration. Let the vendor know what parts of the system are most crucial in your decision so you gain a clear idea of which vendor best fits your needs.

During your conversations with possible vendors, make sure you understand the complete solution package.

- Can you customize applications to meet specific needs?
- Will it integrate with your other systems?
- Is the software “out-of-the-box” or custom-built?
- What type of support—online, phone, email—is available and what hours is support available?
- May I contact some of your customers for reference?
- What is the cost?

There is no denying the important of cost in your buying decision. Yet cost should be seen in a broad perspective because low entry costs may well result in higher total costs along the product's life. Be sure to conduct a cost-benefit analysis to compare costs with the software's range of features and functionalities. Make sure to consider all costs related to the new software including:

- **License Fee:** For On Premise deployment—usually a one-time cost for the software license
- **SaaS Fee:** For SaaS deployments—usually a monthly fee per registered user
- **Modification Fees:** The charge for adapting the software for your operation
- **Installation:** The charge for installing the software on the system
- **Training:** The charge for teaching the users how to use the software
- **Annual Support:** The charge for providing technical support and product updates

EXAMPLE PRODUCT				
CATEGORY	WEIGHT	A	B	GOMEMBERS
Cost	3	X		X
Familiarity	2			
Ease of Use	1	X		X
Security	5			X
Tech Features	6			X
Support	4			X
<b>Total</b>		<b>4</b>	<b>12</b>	<b>19</b>
	Selection			X

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Tech Features				
Support				
<b>Total</b>				
	Selection			

## 5. MAKE A DECISION

Once you've evaluated your options, it's time to make a decision based on the criteria you created during the analysis. Be sure to evaluate not only the AMS solution, but the vendor as a company and the information you received from their customer referrals. We've included a common comparison chart to help make your decision. Do the following to complete the chart:

1. Weigh the key factors on a scale of 10 according to their importance for you
2. Place a check under the AMS if it rates high in each category
3. Add the corresponding factor weights to find each AMS score
4. Compare scores and choose

## CONCLUSION

Choosing an association management system requires a significant amount of research, organization, and time from your search committee. But when the right solution is chosen, your organization will benefit greatly from an AMS solution that truly fits the needs of your organization. Follow these steps to identify areas of importance for your organization:

1. Evaluate current system
2. Set goals
3. Evaluate options
4. Create a short list



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