

Key Steps for Selecting an Association Management System



Presented by

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Assumptions and Context

1. Association-wide vs. stand-alone.
2. Off-the-shelf vs. custom-built.
3. No system is perfect.
4. Process applies to all organizations.
5. Most of your success requires time, not money.



The Key Steps are...

1. Identifying Objectives
2. Needs Analysis
3. RFP Development
4. Identifying Potential Vendors
5. RFP Response Review
6. Product Demonstrations
7. Selection/Contract Negotiation



The Key Steps are...

1. Identifying Objectives

- centralize all data in one source
- improve the view of the customer
- eliminate redundant data management
- improve staff efficiencies



The Key Steps are...

1. Identifying Objectives
2. Needs Analysis



Needs Analysis Examples

Fields

- name, address, membership type, membership expire date, certification date

Functionality

- Easily create new fields and place them on any form.
- Identify two records as duplicates and be able to merge both records (and all detail) into one record.



General Functional Needs

1. Track all pertinent data changes to database in audit log, including user, date/time stamp, field changed, old data, new data.
2. One-click to send email to single contact with attachments if necessary.
3. When single email is sent via the system, automatically track that an email was sent to this contact.
4. Ability to send email to group/list of individuals within database with attachments.
5. When group email is sent via the system, automatically track that an email was sent to this group of contacts.
6. Easily export data to Word, Excel, or Access for document merging, including the ability to design our own templates.
7. Single-screen view to determine a record's membership status and type.
8. Track parent/child relationships between organization records and individual records.
9. Track multiple addresses for an organization or an individual.
10. Ability to run queries on any address type in the system.
11. Track multiple phone numbers.
12. Print one label from an address.
13. Establish different security levels by user login, e.g., User1 can access financial records, while User2 cannot.
14. Access to test database environment for data and process testing.
15. Keep general notes regarding members and make it clear to the user that there are notes on a record.

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3. RFP Development



Critical Elements of an RFP

1. Background of organization
2. Business objectives
3. Timeline of project
4. Overview of functional areas
5. Vendor questions
6. Specific questions and needs



Committee Management

Summary: IWA has 35 standing committees and task-forces, including its board of directors. The BOD serves three year terms, renewable each year, and includes several positions (chair, vice chair, treasurer). In addition, several of the committees, including the BOD, have sub-committees that are usually made up of members of the primary committee (but not always).

2.1 Track individual participation in committees, including join date;

baseline custom no notes:

2.1.1 drop date;

baseline custom no notes:

2.1.2 current position and position history;

baseline custom no notes:

2.1.3 and committee meeting attendance (including in-person meetings and conference calls).

baseline custom no notes:

2.1.4 and staff assigned to the committee.

baseline custom no notes:

2.2 Track committee details including name of committee;

baseline custom no notes:

2.2.1 term of committee;

baseline custom no notes:

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baseline custom no notes: requires meeting be set up in our events module

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2.2.1 term of committee;

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Vendor X

RFP score: 584/600 = 97%

| Pros | Cons |
|---|---|
| <ul style="list-style-type: none">▪ Large company (150+ staff) with excellent resources.▪ Large user base (over 150 clients using product).▪ Very active users group.▪ Lots of baseline functionality.▪ Sold as a whole, rather than in modules, so as IWA requires new functionality, the functionality may already exist in the database and not require significant investment.▪ Very configurable system with use of included toolkit (see “Cons”).▪ All customer service/help desk service is included in monthly fees.▪ Offers the most robust back up/hosting service.▪ They provide a lot of online <u>webinar</u> training, available for free and any time.▪ Includes a content management system. | <ul style="list-style-type: none">▪ Large company with large customer base may make IWA feel “insignificant.”▪ Very complex system requiring significant set up. In addition, in order for IWA staff to be able to add fields and do other configuration, “toolkit” training is required, which requires a higher-level technical ability.▪ Licensing is per user, so costs increase as IWA staff size increases. |

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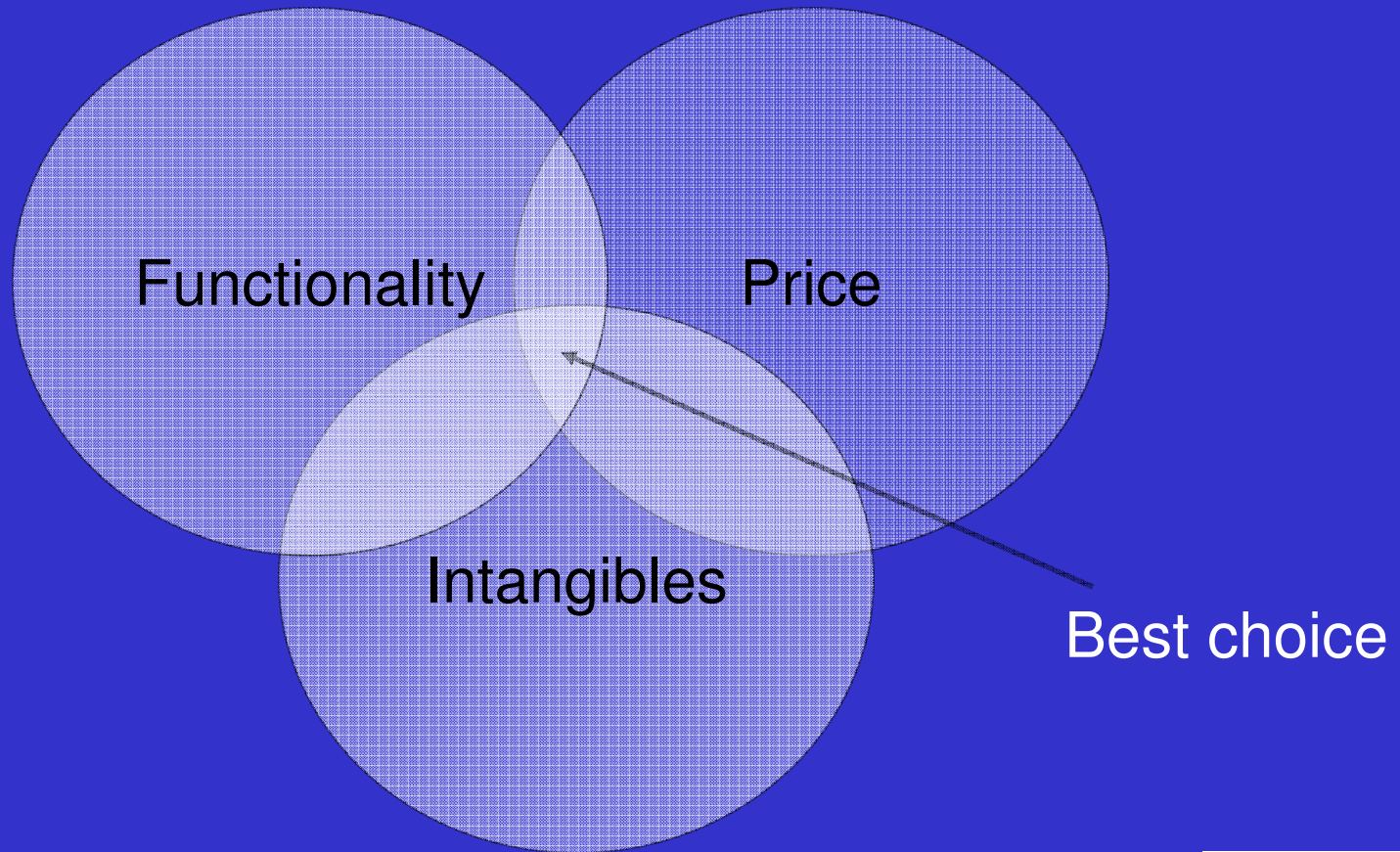


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Decision Points



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