



Altai Systems

209 West Street, Suite 201

Annapolis, MD 21401

Phone: (888) 631-8992

E-mail: sales@altaisystems.com

Association Management Software

BUYER'S GUIDE

WHY READ THIS BUYER'S GUIDE

While it might seem self-serving for an Association Management Software (AMS) vendor to put out a buyer's guide, we believe our insight can help you with making a more informed decision. The more prepared you are, the better everyone is!

There are so many AMS providers promising different things, but what do YOU need? This buyers guide is designed to help you consider your needs when looking at different platforms and help you make a decision that is best for your organization.

Chris Laskey

Altai System's Marketing Director

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BACKGROUND

AMS EVOLUTION

In today's association marketplace, most people in the industry understand the basic functions of an AMS (association management software) solution. At its core it is a database that houses membership, event, and basic accounting data.

Starting in 2005, progressive associations started learning about what the Fortune 500 companies were doing with true CRM systems that Siebel and others were creating. Organizations wanted to have interconnectivity between their various softwares. They wanted one place where they could get a 360° view of their customers and access their marketing, finance, community, etc. data under one main umbrella.



Thus, using CRM (customer resource management) solutions in associations began. Unlike AMS systems who try to retro-fit their software to plug holes created by new software integrations, CRMs were designed from their onset to seamlessly integrate and extend associations' software capabilities.

Top CRMs Used by Associations Today

Today, the top CRMs in the association marketplace are Microsoft, Salesforce, Oracle or SAP based. They all provide customizable data entry form design, easy reporting, social monitoring, app stores, dashboarding, etc. Unless your AMS is based on one of the aforementioned platforms, it has been re-branded or "retro-fitted" as a CRM but does not function as a "true" CRM.

Companies like Altai have added membership, events, certification, donation and member commerce to CRM. Historically, Salesforce was the first to offer a CRM SaaS solution, and today they have 19% of the market. Since then others have also introduced SaaS models and have captured the rest of the market including: Microsoft, Oracle, SAP, and many others.

THE NEXT ITERATION

ASSOCIATION BUSINESS PLATFORMS

As technology continues its constant evolution, so, too, must associations continue to evolve their approach to association management. Today's progressive organizations need more than just a CRM. They need security from hacking, Business Intelligence (BI) to collect, integrate, and analyze complex data, global compliance (GDPR, and many others). They need artificial intelligence (AI) to help anticipate their members' needs, multi-channel marketing automation to reach members on every communication platform

they are currently using, and they need financial management (ERP) for forecasting. Simply put – they need MORE.

Business platforms provide organizations all the same things traditional CRM platforms provide and MORE. They provide, security, BI, AI, ERP, temporary and permanent infrastructures, service management, sales management, identity management, community management, integration management, data quality management, countless extendable apps, etc. The list goes on and on!



SIGNS TO BUYING JOURNEY CONSIDER A NEW AMS

Purchasing a new Association Business Platform (ABP) is an expensive endeavor that requires careful consideration. Technology today changes at an incredibly rapid pace. Is your current AMS up to the task of keeping up with your evolving needs?

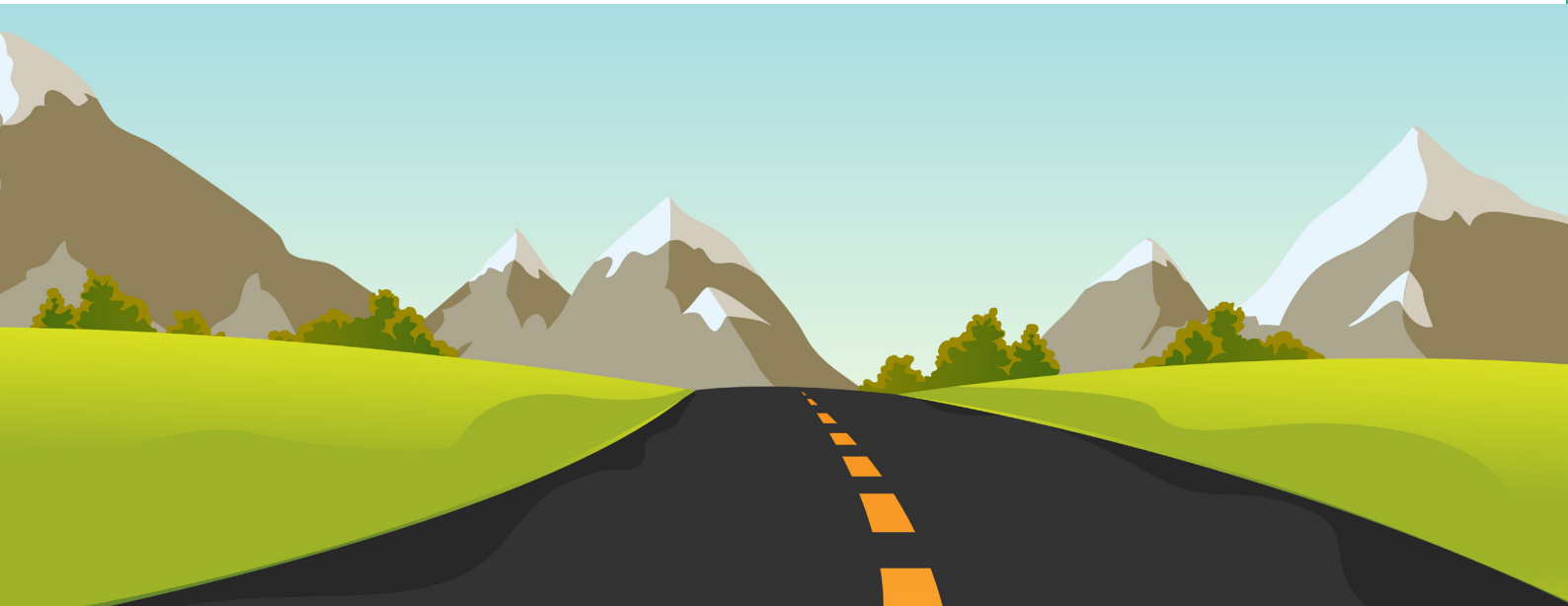
DO I NEED TO UPGRADE TO A PLATFORM

Here is an easy way to find out! On the following page is are lists of statements designed to help you consider whether or not you need to make a change.

If you checked at least TWO or more boxes in the first list, you should consider looking into a new Platform. A comprehensive ABP helps associations keep pace with the dizzying array of new apps and social media platforms that your association's members are using daily. It is also an integral piece to helping your organization realize a digital transformation.

If you checked ONE or more boxes in the second list, you should consider sticking with your current system. ABPs require an obvious investment in funds, but it also requires an investment in the belief that technology enhances membership engagement. You need to believe that seamlessly integrating your Commerce, Content, and Community, will help you connect better with your members and offer them a better user experience.

If you checked ONE or more boxes in



Check all the statements that apply to your current AMS:

- I can only process bill dues and have members register for events on our system.
- I frequently need to conduct business process workarounds of my current system to get the information I need.
- I keep all or most of the information pertaining to my job in Excel or a separate database because I can't easily access it in my AMS.
- I cannot start new a business process without the help of a developer.
- My data is in disarray.
- None of our current systems "talk" to one other.
- I have poor reporting capabilities.
- I don't have an adequate accounting integration.
- I am on an old version of our existing AMS or on a legacy system without a clear product roadmap
- I can't easily analyze how my members are engaging with my organization.
- I will incur high costs to upgrade my current system and still not have all my technology needs met.
- My association operates more like a fast paced Fortune 500 corporation instead of the typical association business model formed 20 years ago.

Check all the statements that apply to your association's strategic planning:

- My association derives all its revenue from a traditional membership fees' model, events, and a few products.
- My association's business model for the next 5 years is projected to be the same as the last 5 years.
- My association doesn't believe that investing in updated technology will benefit our membership.
- My association's executive leadership believes in maintaining the status quo.

BUSINESS NEEDS THAT DRIVE YOUR DECISION TO CHANGE

Your association has a variety of specific stakeholders including: a governing board, members, and partners. You have a responsibility to carry out your mission and generate revenue to maintain the operation, advocacy, and message of your mission. While each association has its own identity, mission, and function, the following outlines a comprehensive list of objectives and requirements that can be selected for the universal needs of most associations:



ORGANIZATIONAL OBJECTIVES

- » Develop and execute organizational and strategic plans that align with the mission of the organization
- » To stimulate the discovery, application, and dissemination of knowledge
- » To create an atmosphere in which all segments of the ASSOCIATION's industries freely exchange knowledge
- » To recognize outstanding personal achievement both inside the organization as well as inside the ASSOCIATION's industry
- » To sponsor programs that challenge and develop younger members for future leadership responsibilities
- » Establish timelines and resources needed to achieve strategic goals
- » Facilitate effective communication with the Board
- » Assess membership benefits and enhance them
- » Maintain and enhance a healthy fiscal position and seek new revenue streams:
 - » Create and manage the annual budget
 - » Identify and pursue additional fundraising opportunities including:
 - » Government agencies (grant-writing)
 - » Philanthropy (foundations and individual donors)
 - » Engage volunteer members to write grants, developing proposals for philanthropic donors, maintaining relationships with donors and funding organizations
- » Identify and pursue additional revenue generating opportunities including:
 - » Conducting and selling industry related surveys
 - » Creating and selling eBooks and journal articles
 - » Live Stream breakout sessions for viewing for a fee for each session
 - » Consider different levels of membership
 - » Bundle multiple services and programs for separate fees
- » Improve communications to enhance the ASSOCIATION's brand
 - » Seek out new opportunities for brand awareness
 - » Work collaboratively with members to build and engage in new partnerships
 - » Cultivate ongoing relationships with various stakeholder groups
- » Ensure activity of committee meetings by engaged board members

OPERATIONS AND ADMINISTRATION REQUIREMENTS

- » Collaborate with the Board in the formation of new policies, procedures, and programs
- » Provide an annual report on the state and accomplishments of the organization
- » Facilitate strategic conversations within the board, contribute to the development of the association's strategic plan
- » Create an operations plan to support the accomplishment of strategic goals
- » Maintain the organizational structure, ensuring sufficient human resources needed to carry out the association's mission and work plan
- » Actively engage and energize members, volunteer leaders, board members, industry partners, and other stakeholders to move the association forward

FINANCIAL REQUIREMENTS

- » Develop and propose the ASSOCIATION's annual budget working with the ASSOCIATION's Finance Committee and/or Treasurer
- » Ensure that deferrals, account payables, account receivables, batch processing, invoicing, and all other accounting functions are performed accurately and efficiently
- » Manage the approved budget and provide regular financial reports to the Board, highlighting areas of opportunity or concern.
- » Work with ASSOCIATION's investment advisor to effectively maintain and grow the ASSOCIATION's assets and reserves.

MARKETING, MEMBERSHIP, AND PROGRAM REQUIREMENTS

- » Facilitate a marketing and communications strategy that:
 - » Identifies member needs
 - » Effectively communicates the member value proposition
 - » Raises the visibility of the ASSOCIATION's products and services
 - » Promotes the important work conducted by the ASSOCIATION's members
- » Maintain an up-to-date and vibrant web presence
 - » Enable a web portal for members' easy access to their account
- » Research, create, promote, and support the development of the ASSOCIATION's publications and educational programs
 - » Ensure that the ASSOCIATION's publications, programs, and services meet members' needs
- » Promote the ASSOCIATION and the importance of membership in the ASSOCIATION to all external and internal stakeholders
- » Ensure program development, marketing, and administrative support for all the ASSOCIATION's meetings.
- » Promote all fundraising, sponsorship, and revenue building activities
- » Nurture existing partnerships and create new strategic partners to enhance the ASSOCIATION's grants, programs, advocacy, resource material, and networking potential

WHAT ARE YOUR SYSTEM CONSIDERATIONS?

Keeping in mind the aforementioned objectives and needs, you should consider a system that will:

- » Be flexible enough to allow your team to creatively consider new ways of creating content, raising revenue, and reach your members today as well as in 5-10 years
- » Be part of company whose future is built on long term app planning instead of playing “catch up” with patches to existing systems
- » Be built within a cloud platform that has a solid foundation mitigating security, privacy, and storage concerns
- » Give you the ability to write your own basic reports and utilize AI enhanced reporting methodologies
- » Use basic workflows and automations that do not require developers or vendors to support the network
- » Enable automatic upgrades

“Aligning your data strategy with your business strategy is another way of saying that your association, if it is going to trust in its data, will change its method to accomplish its mission.”

- Rebecca Achurch
Founder, Achurch Consulting

REFERRAL RESOURCES

HELP IN BUYING

AN AMS PLATFORM

Once you have compiled your AMS requirements, you will be looking for referrals and sources of places to help you narrow down your options. The cheapest and quickest first step is to use a search engine like Google or Bing to help give you an idea of different options. While that step is easy, you may soon find that the options become overwhelming. In addition, you may see only the top paying advertisers, not necessarily the best AMS providers, reach the top of your search. To help narrow those options down, here are other sources to consider:

AMS SPECIFIC ONLINE OPTIONS

Like Yelp and other service rating sites, there are sites where users of the platforms have submitted reviews of various AMS providers. In addition, association related user group forums are also great places to ask similarly sized organizations what they have used and why. Some of the most popular include:

- » ReviewMyAMS
- » ASAE Collaborate
- » Higher Logic User Group (HUG)

*When reviewing references look out for "Compensated" flag. Some companies pay employees up to \$500 for a good reference.

CONFERENCES

Association specific conferences can offer you some of the best options for finding AMS providers. The providers that exhibit at these conferences all will serve associations and will have a higher likelihood of serving your specific segment of the association market. Some of the top national association related conferences include:

- » ASAE Tech/Annual/MMCC
- » AMS Fest
- » .orgSource

VENDOR SELECTION CONSULTANT

After an independent search, you may decide you'd prefer a Vendor Selection Consultant. Consultants provide internet and technology strategy to the association community. Often comprised of former association professionals and software technicians, they understand the specific nature of an association's operational needs. Some of the top independent consultants include:

- » Achurch Consulting
- » DelCor
- » Dennison & Assoc
- » Effective Database Mgt
- » Ellipsis Partners
- » .orgSource



UTILIZE THE
REVIEWS OF THOSE
THAT CAME BEFORE



VIRTUAL EVENTS
STILL YIELD
CHANCES TO LEARN



CONSULTANTS CAN
MATCH YOU WITH
WHAT YOU NEED

DOES MY INTERNAL STAFF HAVE THE ABILITY TO EVALUATE THIS DECISION THEMSELVES?

The short answer to this question is - yes.

Your staff uses your current system everyday, and understands better than anyone the “pain” points. In addition, if you have a progressively minded IT department, they will understand the trends in technology and have an idea what your needs are both internally from an operations standpoint as well as your member/external facing needs. That said, your team may not have the time or bandwidth to conduct a comprehensive search, so going with a consultant may be a better option.

Either way, the following section will help you make the entire process easier.

STEPS TO TAKE WHEN PURCHASING



BUILD YOUR TEAM

Identify The Stakeholders

You may be super excited for a new AMS, but like most great ideas in life, the hard part is getting everyone else on board with your idea. Since the entire staff — from the shipping clerk to the CEO will need to use the system, you will need to identify the decision makers up front and establish that team. If you don't have an IT department, then you will most likely be using a consultant to spearhead your team. Let that vendor know that you expect a “turn key” system as there will be no technical users on staff. The vendor can use this information to develop the best strategy moving forward.

Your team should include the following:

- » IT
- » One Person from each revenue producing department such as membership, events, credentialing.
- » Accounting and Finance
- » Marketing
- » The Executive Team
- » Optional Members Might Include: Your biggest naysayer towards a new AMS and the most organized person on staff



IDENTIFY THE PROJECT LEADERS

Team Leaders

You will need someone on your team to take responsibility and be the overall Project Manager. This Project Manager needs to be bold and not shy with both the ability and authority to push back when needed. If no one on your staff has ever managed an AMS implementation, you may want to subcontract out this role to someone with experience. Lack of experience will prevent you from knowing you are making a mistake until it is too late to correct it without incurring significant costs. If you do opt to use a consultant, then your overall Project Manager will need to also specifically express his/her expectations of the consultant.

Identify the Tech Lead

If you have a tech team, then you will need IT's help to implement this system. Often the Tech Lead will also be the overall Project Manager. Your will need IT's support from a technical level and their input is integral to the success of selecting the right platform for your organization.

Identify the Business Process Lead

Each department of your association will need to put forth a person who:

- » Understands what the current business processes are for their department
- » Can project what future business processes they will need
- » Can articulate what processes are critical and what are “wishful”





GENERATE EXECUTIVE BUY IN

Recruite an executive sponsor

You will need an executive that can provide the 2-5-year strategic vision for your organization. You are not buying a new system to replace the old system, you are buying a new system that facilitates future growth.



GATHER YOUR REQUIREMENTS

Understanding the Finer Details

This will be the most difficult and frustrating work you need to do, and guess what? You will need to do it twice. You need to define all your requirements so when you send out an RFP you will be able to have a reasonable expectation of what you want. When you do choose a vendor, they will want to do all the requirements again at a very detailed level so they can setup their system.

Determining What's Most Important

You will need to develop an RFP, and if you don't have one, the best place to start is with an RFP template. You can get templates from colleagues, from ASAE, sometimes consultants sell them, or you hire a consultant to do this for you. Whichever way you proceed, make sure you check your by-laws before starting to ensure the purchasing decisions you make align with them.

PREPARING YOUR LIST OF REQUIREMENTS

Inside your RFP will be a list of requirements for your new system. It might look like this: For each of your revenue producing departments, ask the stakeholders to produce a concise list of requirements for:

- » Each item they do on a daily process that keeps you in business (Priority = Mandatory)
- » Each item they do manually that wastes their time (Priority = Nice to have or future)
- » Each item that will be required in the future (Priority = Future)

PRIORITIZING

DEVELOP YOUR NEEDS

You need to develop a priority for your needs, and they can't all be immediate and required. If every want and fantasy item is required to go live then your RFP responses and budget will be much higher. Our suggestion is to break out needs by priority:

IMMEDIATE NEEDS = I CAN STAY IN BUSINESS

For each business process that you perform, put the requirements in a list. For example:

- » Follow the dollar from Web to GL.
- » Follow the member from joining to renewing
- » Simple membership example:
 - » We need a place for our members to join on the website. Below is the form we use today.
 - » We need special pricing that is calculated by

[put in all your rules for each membership]

- » We need the ability to renew every year
- » We need the ability to batch our daily work into batches
- » We need the ability to integrate completed batches into our Great Plains Dynamics GP system
- » We want the Batch to post in summary

LIKE TO HAVE = NOT NEEDED FOR "GO LIVE"

This is where you park the items that you really want, but aren't necessary to take the system on-line. These tend to be the reasons you have decided to switch systems. For example, this can be your envisioned member "self-service" items. These are the things your member can do that will save your staff time. To do that:

- » Follow the business process you are doing now
- » Count the time it takes and the process steps
- » Put this in your requirements
 - » Simple membership example:
 - » Currently you spend 35 minutes keying in a new member. First you have to calculate X, then you need to email a staff member to get y, then you need to setup the form. If the member could go to a page, key in their head count and then go to the renewal form you could save x hours per month.

FUTURE NEEDS

You need to describe future business processes coming down the road in the next 2- 5 years. Part of going through this entire selection process is making sure your new system is adaptable and allows you to explore additional revenue streams. (NOTE: We have met a lot of associations that cannot add new lines of business because their current AMS systems holds them back.)

Simple membership example:

Your board has asked you to create a certification program in 2020. It will involve members filling out an online application and completing the program using a new LMS.

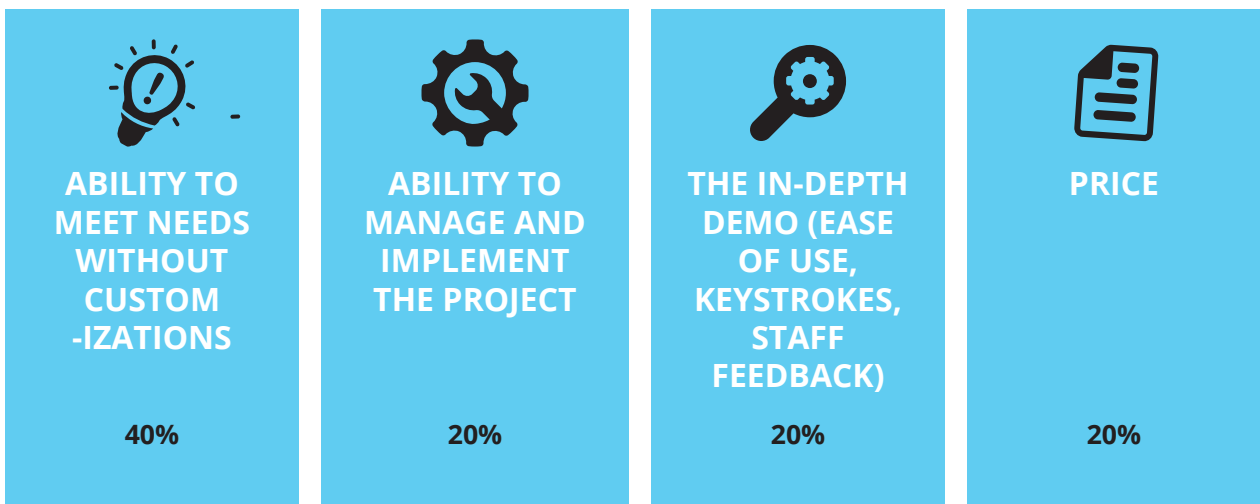
DEFINING THE PROJECT

EXECUTIVE OVERVIEW

This needs to come from your executive team and needs to talk about their vision. Why are you doing this? Where do you want to be in 2 – 5 years? What is your Vision? What is the team’s vision of the project? Where does it start? Where does it end?

SCORING METHOD

Think about how you will score vendors. This is what we typically see.



You will need to tell the vendors what you want to see in a demo. All vendors should be working from the same demo outline that you give them.

OBJECTIVES

What are the objectives of the first phase of the project? If there are multiple phases then what are the objectives of each phase?

REQUIREMENTS MATRIX

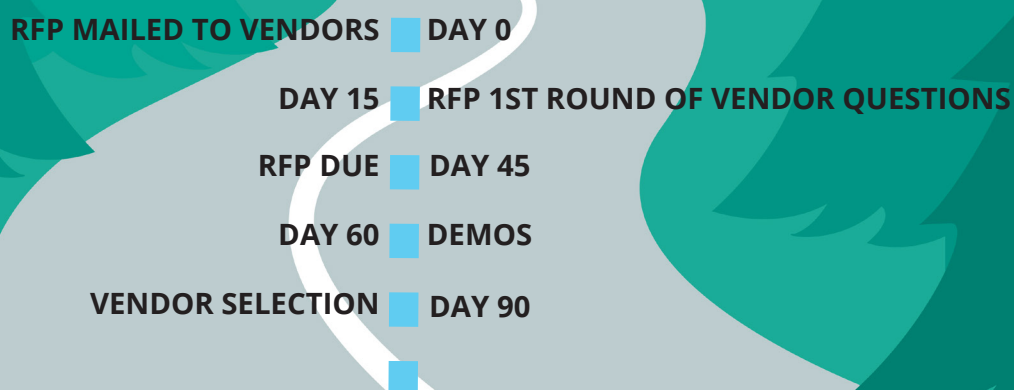
The detail requirements go here. Give the vendors a spreadsheet version of this so they don't have to rekey it or copy and paste it.

INVENTORY OF EXISTING SYSTEMS

This is a list of all the external systems with which you integrate (i.e. What it is, Description, Brand, any details of existing integration) such as:

- » Your web site
- » Your email marketing platform
- » Your LMS
- » Your Accounting Solution

PROJECT TIMELINE



A FEW NOTES ABOUT TIMELINES:

- » If you give a vendor 1 week to respond, considered “Column fodder” and most likely you won't get a response. “Column fodder” are vendors' RFP responses that you don't want to win, and you know you will never choose them. The column is just to make your board happy that you did 3 responses.
- » There is no sense in rushing as you are only hurting your organization.
- » A large RFP might need less than 4 weeks to respond if you want the RFP to include thought leadership vs. canned responses.

VENDOR QUESTIONNAIRE - WHAT DO YOU WANT TO KNOW?

Typically these questions are all about a vendor's history and background, such as:

- » Years in business
- » Financial stability
- » Ownership structure
- » Who can help you with the implementation if you don't like your team
- » Years in the industry
- » Executive profiles
- » Where exactly is the system hosted?
 - » Many vendors host their AMS in custom data centers — find out exactly who is hosting your AMS
- » How is data protected with respect to security?
- » How is data protected with respect to backups?
- » If you inadvertently mass delete data can you get it restored?

DEVELOPING A BUDGET AND SCOPE

Now that you have gathered your requirements, send out the RFP to a few AMS vendors (narrow your focus - don't send it to 20 vendors and don't send it to one. If you don't have all your requirements or your board has not approved the project, then send it out as an RFI (Request for Information) vs. an RFP (Request for proposal). RFI's are less restrictive but will still get you good information. RFP's signal to vendors that you are actively looking and not simply gathering information. Vendors take these very seriously and spend between \$3-10k responding to an RFP.

HOW TO ESTIMATE BUDGET

There are a few quick ways to estimate the cost of an AMS. These are not binding amounts, but do give you a solid baseline for planning purposes:

1. Cost to get your last system up **plus** Amount spent on customizing it in the last five years
2. Your annual revenue **x** 2% (if your needs are very simple) or 5% (if your need are extremely complex)
3. Your staff count **x** \$3,500 (if your needs are very simple) or \$12,000 (if your need are extremely complex)

SUCCESS MEASUREMENTS (ROI, ETC.)

Develop a set of metrics that you can judge concisely so you can tell if the project is successful. Make sure to put this in your RFP. Here is an example:

- » If staff can create simple membership reports in less than 5 minutes and...
- » The dues bill runs in less than 1 hour and is a push button operation and
- » Your current revenue streams are working and accurate....
- » Then the project is deemed a success

3 DIFFERENT PRICING 101

WAYS OF ESTIMATING

LINE BY LINE ESTIMATE OF THE NEEDS

This is the best way for you to determine your price. You may go in line-by-line or section-by-section and estimate each process. On top of all the requirements you listed you will estimate the costs of project management, data conversion, training, QA, testing, etc.

1.5% TO 3.5% OF ANNUAL BUDGET

While this seems subjective, it is a great check. The average we see is almost 2.5% of annual revenue.

\$3,000 TO \$8,999 PER USER

While this, too, seems subjective, it can be a very helpful determination. What we have found is that if the average amount estimated is less than \$3,000 per employee, your employees suffer. There will be no money left to train them and/or pay for support after implementation. We hear of some AMS bids that are \$1,000 or less per user and this can create a detriment, this kind of bid requires your team to "do it ALL yourself". Conversely, if the average amount estimated is over \$12,000 per employee, you have most likely overestimated the complexity of your requirements.

IT IS IMPORTANT TO MAKE SURE THAT VENDORS CAN MEET YOUR TIMELINES. IF HALF THE VENDORS YOU CONSIDER TELL YOU THE TIMELINE IS UNREASONABLE, LISTEN TO THEM. RUSHING CAUSES ERRORS AND OMISSIONS WHICH COSTS YOU MORE MONEY IN THE END.

TYPES OF DEMONSTRATIONS

AMS DEMOS

LEVEL ONE These are 1 hour - 35,000 foot demos, typically done virtually. The vendor is not configuring their demo to necessarily match all your specific pain points. They are simply showing you some of the highlights of their software. Your investment, and the vendor's investment, is typically 1 hour. It is worth attending this type of demo to get an introductory view of the system and get a feeling for its capabilities.

At a minimum, what you should expect from this demo is:

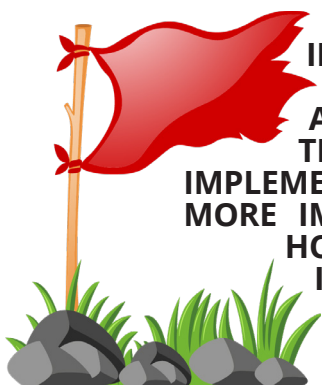
- » A visualization of how the system is setup/ how it looks
- » What modules are in the system
- » How to do a basic query of the data
- » How to email a member
- » How the system relates data

LEVEL TWO These are about 2-4 hours long, could be conducted virtually or on-site, and go into much more detail. The vendor has read your RFP and is showing you what you probably need to see. That said, expect to not have every detail of the RFP covered at this time.

LEVEL THREE These are usually in person and can be 1-2 days long. They are scripted to your business processes; the demo person has read and deeply understands your RFP and your pain points. Because the vendor is spending considerable time and money preparing for and instituting the demo, they expect you to provide an agenda that shows (at a minimum) each revenue process you need implemented.

From these more detailed demos, you should expect to have each of your revenue streams shown. The vendor cannot show every detail, but they can cover them at a level that conveys how the system will work. During this demo you will need your team to have their scoring sheets so they can evaluate the vendor in real time. You will also need to keep your staff on target so the demo does not get derailed by a team member who fixates on various tangents.

ALWAYS CHECK THE REFERENCES YOUR VENDORS GIVE YOU. YOU SHOULD ALSO CHECK THE REFERENCES THEY DON'T GIVE YOU. A GREAT SOURCE IS REVIEWMYAMS.COM. TAKE THE TIME TO LOOK AROUND AND READ OTHERS' EXPERIENCES AND RANKINGS.



IF ALL THE REFERENCES YOU CHECK COME BACK WITH ABSOLUTELY NO ISSUES, THERE IS A PROBLEM. NO IMPLEMENTATION IS PERFECT! IT IS MORE IMPORTANT TO UNDERSTAND HOW THE VENDOR MANAGES ISSUES THAT ARISES RATHER THAN LOOKING FOR PERFECTION.



SELECTION PROCESS

AMS Reference Questions

QUESTION	ANSWER
WHAT WAS THE BUDGET FOR YOUR IMPLEMENTATION?	

Rank each statement from 1-5 (1=poor, 5=exemplary)

STATEMENT	1	2	3	4	5	NOTES
The project was completed on time.						
The project was completed on target.						
The project was completed on budget.						
I give the implementation team a rating of						
I give the development team a rating of						
I would give the Project management team a rating of						
Ability to meet the requirements matrix/ voting results						
I would give this vendor an overall rating of						

QUESTION	ANSWER
Who on the vendor's staff were less than helpful?	
Who on the vendor's staff did you love?	
What was the hourly rate for extras?	
What was the hourly rate for data?	
How did bad data affect the budget?	
Do you have any additional comments or things I should know?	



Cultural and Business Fit

Ask yourself: Does this vendor fit with our culture? In the end, you should do business with people you like and respect. Often the sales person is not the person with whom you will ultimately be working. Make sure to meet the entire team as well as the vendor's executives.



Legacy Vendors

One of the first AMS vendors to enter the marketplace over twenty five years ago is iMIS. Now called ASI iMIS, it is still a major player in the field. Their focus has, and continues to be, database management. If you are a mid-sized organization with a few fixed revenue streams looking for a database, this might be the right fit for you.



Know the Differences

At last count, there are over 100 individual AMS vendors, but there are seven who operate an AMS based on a "true" CRM.

Other vendors who have a long history in the marketplace include: Personify, Abila, Netforum, and Aptify. Since their respective inceptions, their original founders have sold their technology to larger venture capital firms. All have essentially the same core functions and features. When considering these systems, it is important to ask about their product roadmaps and support. If they are discontinuing the production of new versions, you may want to re-consider its long term viability.

Salesforce

Salesforce was the first vendor to base its operations exclusively as a software as a service (SaaS) model without offering the option of being hosted on-premise. They offer basic services out of the box, and have a sizable AppExchange that allows users to easily extend their platform. The apps are designed to integrate with Salesforce as well as other partners. While this extensibility is helpful to diversifying your functionality and supporting multiple revenue streams, it does not come for free. The AppExchange typically adds 25% to the cost of each app's fee. There is no doubt that Salesforce has become a leading CRM vendor, but it is also one of the most expensive platforms available.



Is it really a CRM?

Today almost all AMS Vendors claim to be CRMs or even full platforms offering the agility and integrative qualities of a "true" CRM. Be careful! Those systems may offer things like cloud hosting, but in reality, their cloud is hosted on a private server that doesn't offer the same protections of an Azure or AWS cloud.

MICROSOFT

Microsoft Dynamics has been in the CRM market for over 14 years. They are profitable and arguably more successful than any other vendor. While its main competitor, Salesforce, entered the SaaS CRM marketplace first, Microsoft has made significant strides in increasing their market share and now focuses on the business platform which includes the CRM Together with their Office 365 and Azure capabilities, Microsoft is leading the pack and pulling away with integrative capabilities, speed, and security. Today the complete Microsoft platform (on which Altai is based) brings more functionality than any other AMS platform at about 2/3 of the cost. This means every 3rd year you will have a nice budget on which to help you serve your members better.

THE POWER OF AZURE

Azure is an ever-expanding set of cloud computing services to help your organization meet its business challenges. Azure gives you the freedom to build, manage, and deploy applications on a massive, global network using your preferred tools and frameworks. Microsoft Dynamics (and

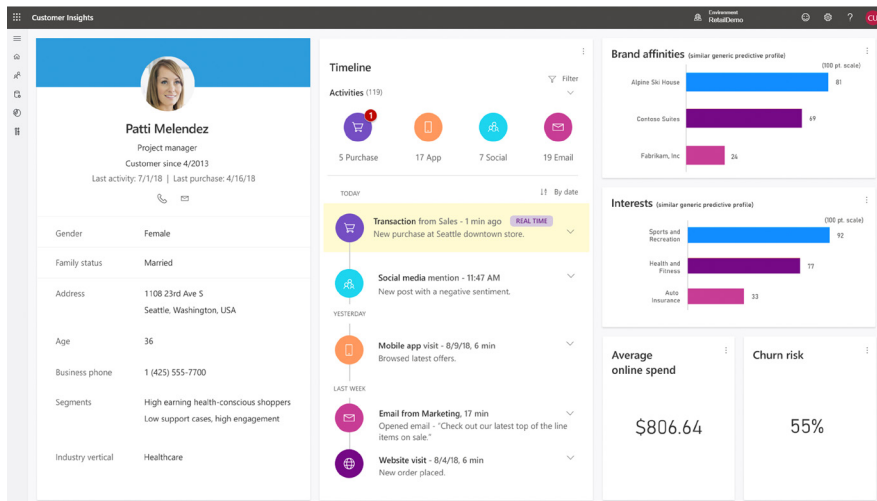
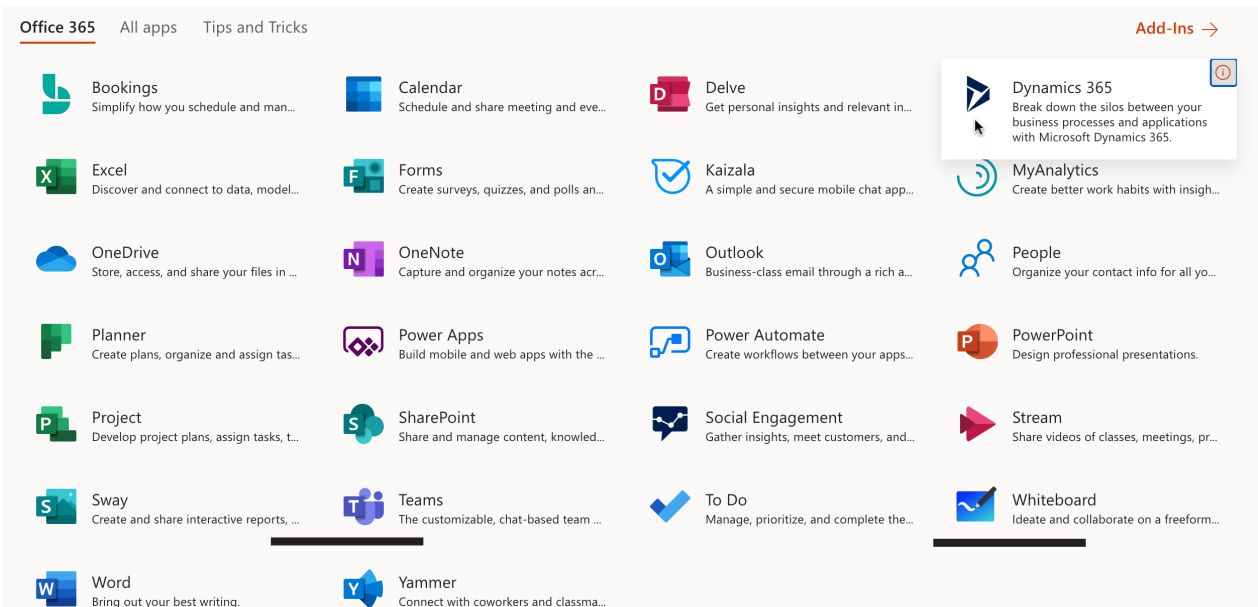
Altai) is run in the Azure data centers and is integrated to most of the Azure services that are offered. Azure is progressing so fast and they are adding useful business apps at a rapid pace. Web sites, databases, email platforms, research tools, BI tools. You name it, it is in Azure. Between Office and Azure there are thousands of business apps that can be used to extend your business operations and membership engagement with little or no extra costs.

THE POWER OF OFFICE 365

There are now over 155 million Office 365 business users worldwide. Outlook, Word, Excel, PowerPoint, SharePoint, Teams, and more are all part of the Office 365 suite of products. Office 365, when combined with Dynamics' CRM, and an AMS like Altai built within it (containing Membership, Events, Engagement, BI, Credentialing, and more) gives you the entire package of what you need today and tomorrow.

THE COST OF DYNAMICS CRM

Reflected in Dynamics' price is its robust out of the box functionality and inherit Microsoft integration. When associations are quoted implementation costs of a Dynamics based platform, the costs may initially come in higher than Salesforce. The key is to look deeper at the long-term costs. The cost to add apps is significantly reduced with a Dynamics implementation because so many apps are already included. Salesforce does not have the same number of included apps with its application. While the extensibility of the platform is comparable to Microsoft's, the cost of implementing the extended functionality will most likely be much higher.



STAYING PROJECT JOURNEY ON TRACK

PROJECT MANAGEMENT 101 Congratulations! You have made a selection; now you need to implement. As discussed earlier, you need a good Project Manager (PM) to represent your interests and keep the teams in synch.

OVER COMMUNICATE Open communication is the key to success in any project. Ninety-five percent of all project failures are due to poor communication. Particularly when choosing a PM, look for someone who is an effective communicator that is not afraid to tell you the good, the bad, and the ugly.

10 IDEAS TO KEEP A PROJECT ON TRACK

1. Have a comprehensive realistic project plan
2. Stick to the project plan - There will be many who try to add scope (tasks) to the project plan. Try to keep these items out of the project until the main project is live
3. BE PROACTIVE— If there is a problem, DO NOT sweep it under the rug
4. If something seems off or is making you uncomfortable, throw it on the table and discuss it until it is resolved
5. Keep an audit trail of the original plan and each item that addresses/fixes it
6. Demand change orders for every \$ or date change to the plan. It's like a GL account:
Beginning Plan
+ All addition work changes orders (In \$ and hours)
- All work descoped(In \$ and hours)
= Your current status and budget (In \$ and hours)
7. Demand weekly status reports from the vendor and forward them to your management
8. Hire PM's who are taskmasters to run your project
9. If you are having trouble communicating with a vendor's staff member assigned to your project, let the vendor's management know so you can resolve the issue
10. Stick to the project plan.

AVOID CINDERELLA SYNDROME

Cinderella Syndrome happens when you expect to write the vendor a check, and they do everything exactly the way you envisioned it would happen. There is no Fairy Godmother to wave her magic wand and make everything perfect. YOU and your team need to be actively involved in the entire process. Your executives should spend a minimum of 15 minutes per month in an executive vendor status meeting. Require that your vendor provides an executive sponsor who meets regularly with your own project sponsor, and make sure all members of the project team (on your side and the vendor's side) have regular check-in meetings.



HOW WELL DO YOU KNOW YOUR DATA?

DO NOT COMPARE THE DATA CONVERSION COMPONENTS OF YOUR PROJECT DIRECTLY WITH OTHER VENDORS AS THE ASSUMPTIONS BEHIND THE CONVERSION MAKE A TON OF DIFFERENCE. SOME VENDORS WILL HELP WITH THE DC PROCESS, SOME B I D LOW AND ALL THE DATA ISSUES ARE 100% ON YOU TO FIGURE OUT. MAKE THE VENDORS DISCUSS THE DATA CONVERSION ASSUMPTIONS WITH YOU SO YOU CAN COMPARE. TELL THE VENDORS HOW MUCH YOU KNOW YOUR DATA.

THE CONSULTANT If you are using a consultant, make sure s/he has read the RFP and your vendor's response in its entirety before the project begins. In fact, the consultant's name should be on the RFP response as well as your PM. Seasoned consultants will start the project by doing a discovery. The other steps and ideas outlined throughout this eBook should be expectations of them.

THE SUPER-USER Your project will go much smoother if you have a superuser that is passionate about the project. Make sure you let them know they are valuable to the implementation of the project. Involve them in testing and use their input along the entire process. A passionate person will make a good project great.

THE FINISH LINE IMPLEMENTATION COMES INTO VIEW

This is where the rubber meets the road. We recommend you start with the "quick wins" or tasks/features that are easy and quick to implement. By starting with those first, your team (particularly any naysayers) will see progress quicker and will become more comfortable with the new system faster. If you are a member-based organization, you may think it's best to start with the membership module first, but that process may require more time, labor, and planning to implement successfully. By starting small, your team will develop a comfort and knowledge of the product that will help later during the tougher parts of the project.

AMS

SUMMARY

BUYER'S GUIDE

As we said in the beginning, associations today want MORE — more flexibility, more options, more robust reporting capabilities, more engagement metrics — MORE! But something they also desperately need is LESS. They need less time spent on mundane tasks, less time and money spent on costly upgrades, less worry wondering if their AMS will be obsolete the minute they sign the vendor contract.

Progressive organizations are looking for their next AMS to be a platform that utilizes artificial intelligence (AI) and business intelligence (BI) capabilities to automate things like self-service tasks for members. They want to use customer insights to strategically predict what types of needs will most resonate with their members. They want to not be held back by their AMS, but to have it be what propels them forward into this new decade and beyond. When making your AMS choice, don't go with the "cheapest" AMS, go with one that will give you the most value today and in the future.



Altai Systems

LEARN HOW ALTAI'S ASSOCIATION BUSINESS

**PLATFORM CAN HELP YOUR ORGANIZATION
MAKE A DIGITAL TRANSFORMATION**

CONTACT US

(888) 631-8992

**WWW.ALTAISYSTEMS.COM
SALES@ALTAISYSTEMS.COM**

MOVE MOUNTAINS WITH ALTAI SYSTEMS

Altai's journey began when two seasoned association professionals set out on a mission to provide solutions for association management based on a Fortune 500 business platform. From there, we embarked on a quest to change the way businesses manage a multitude of operations and became the first company to create association management software using a true CRM (Siebel). By being the first to embrace CRM technology, we became leaders, inspiring others to witness how a true revolution can happen.

We seek the industry's next leaders, innovators, and game-changers. We want to empower driven, passionate people to stay committed to their purpose. At Altai Systems, we believe in giving associations the technology they need to move mountains. A better solution is on the horizon for your business. We can provide it with our innovative Association Business Platform built within Microsoft Dynamics.

Approximately one-third (1/3) of organizations worldwide are currently using Office 365. Chances are very high that your organization is using Office 365 right now. If you are, you should know that NO OTHER Business Platform can integrate as seamlessly with 365 as Altai Systems.

Contact us at sales@altaisystems.com to see how our strategic vision utilizes the Microsoft business platform that can spark a digital transformation within your organization.