

Selecting the Right Association Management Software for Your Customer

Abstract:

Selecting association management software can be daunting due to vendors' variable pricing structures and features. Yet navigating your way through vendor offerings is essential to choosing a system that works best for you and your clients. Selecting suitable software is one of the most important, and possibly cost-saving, technology opportunities you'll be charged with. Ensure you have the necessary information and knowledge required to make a decision prior to beginning your search.

This article provides a checklist of offerings and notes to help you with your needs, cost assessment and planning as you shop for membership software. It also illustrates the different kinds of systems available, as well as definitions of products and commonly-used terminology. Communication is key in this process but good communication begins with knowing the language and being able to compare like offerings.

Selecting association management software for your association customer(s) requires knowing the language, assessing your needs and those of the organization(s) you represent, asking the hard questions, and shopping by comparison. There are a plethora of vendors and products on the market offering from the simple database to robust membership management software with social networking features. Breaking down the steps into a manageable process will ensure that your selection suits you, your customer and your bottom-line best.

Know the Language:

Association management software is a broad, umbrella term. In its simplest form it allows you to manage your members. In that sense, some would term Microsoft Excel as membership management software, but a quality AMS provides more than a list of your members. It makes you more efficient, allows your association to remain connected to its members and provides reporting and organizational tools. But Association Management Software is only as good as the information it houses so to make your AMS the most robust it can be, you'll want a constant feed of member information. Without a social networking component, an AMS is only static, and quickly antiquated, database. Social networking features optimize your AMS, providing a constant flow of updated member information, transactions and activity histories – while delivering added value to your members.

Integrated. Is the AMS you are considering a pieced-together solution of multiple components (from one or more vendors) or a system that is comprised of multi-functional, integrated features (designed to work together)?

All-inclusive vs. per-use licenses. Is everything included or are you charged on a "per" basis. Whether pricing is based on the number of admins you need or the number of users/members within the association, "per" agreements offer trickier pricing structures.

What may, at first, appear to be a more cost-effective solution may end up costing you more as you realize you are unable to accomplish what you wanted for the number you chose to pay for. If "per" fees are based on member numbers, you will be penalized by your own success (as your community grows).

Other items that may or may not be covered in the association management software are support, training, upgrades/enhancements and web design (if the AMS also includes a front-end member

component). All-inclusive pricing may save you money when you consider all the pieces you have to pay for.

Online Member Community. Some AMS include ways for your associations to engage their members. An online community platform allows members to connect and network with one another in a safe, secure environment while providing you with data that further drives reporting. In today's connected social sphere, an AMS is incomplete without some sort of member community component.

Software as a Service (SaaS). Frequently referred to as "cloud computing," this allows your organization to manage/access the AMS from any Internet connection – mobile, netbooks, laptops, desktops, etc., without downloading software. Accessing your member data is as easy as keying in a URL.

Application Programming Interface (API). This intimidating group of words is essential in integrating your current offline or third-party systems or databases with your new AMS. It allows for an easy transfer of data. Ask all potential vendors how they orchestrate the exchange of data – and if they charge for this service.

Perform a Needs Assessment:

For you. Consider your needs as a manager of the association and how software can help you do your job more efficiently. You'll want a system that's user-friendly, affordable and quick to implement and train on.

For your customers' members. Providing a community based on networking and interaction, offers them more value for their membership. Your customers' members are already familiar with the web 2.0 world of networking for personal and professional development, and they're looking to their professional organizations (and their paid memberships) to provide this level of instant engagement and collaboration.

To increase efficiency, cut costs through convergence of systems. When performing the needs assessment, analyze the current systems in place. Consider online dues collection – not only how they are collected but how reminders and renewals work. Think about events – how is the word spread, is there online registration, ticket purchasing, calendar updates, event reminder, attendee lists, etc. Consider your customers' ecommerce needs – do they provide online stores? What special features do they have (or want) for their members (or the public) – website, multi-tiered memberships, online applications, career/volunteer center, referrals, chapters, blogs/forums, etc.

Consider current and future needs. Imagine what you would want if you were building the software from scratch. Ask vendors if your dreams are possible. You might be surprised at what some AMS systems offer. While you're compiling this list and asking the questions, make sure that you are asking if your favorite features are included in the price or whether they are just being achieved through costly add-ons. Consider what you currently pay for. Does this new AMS offer features that can replace redundant systems, at a significantly smaller cost, in one integrated solution?

You quickly can achieve ROI by combining many disparate systems and databases – online dues collection, event management system, email marketing tools, survey system, billing system, donations/fundraising software, etc. – into one, comprehensive AMS.

Uncover hidden bonuses for greater cost-savings. You know you're paying for an AMS. You've read the list of features. What "hidden" features may make your final decision easier?

Ask about the bulk email system. How does the system help you with SEO or web analytics? Are there ways for you to earn additional revenue from ads or sponsorships? Does it offer instant chat or "online now" capabilities? Can you connect with your other online profiles or use your Facebook credentials to log in? Do they have RSS feeds? Ask about reporting capabilities. Discover how easy it is to get information into (or out of) the system. And always ask what the costs of these hidden gems are.

Know the Systems:

Equally as important as knowing the commonly used words surrounding an AMS, is understanding the different kinds of options available in procuring an AMS.

Custom. This AMS is built specifically for your association's needs and to your specifications. It is the most costly option because it is built by either your internal tech team or a vendor and can cost tens of thousands of dollars depending on your requirements. You are absorbing the entire cost and may or may not be able to pass these costs along to your association clients. As more associations turn to choosing an option that spreads out the development costs, it will be harder for association management companies to justify the cost spent in developing an AMS from scratch.

Open source. This is a free solution that is one-size fits all. Open source options generally offer generic features and charge for upgraded solutions. The benefit is the cost savings; the disadvantage is limited functionality, support and no custom design.

Pre-built, integrated. This is an AMS that allows you to share the cost of an extremely robust system with several other organizations. The AMS vendor charges a license or subscription fee and spreads the cost of the development of the system across all of its customers, making it agile and affordable. It offers opportunity for customization and complete content control and is the happy medium between creating one from scratch and using a free download. Costs can be easily absorbed by your AMC or passed along to your association clients.

Looking toward the Future:

A final suggestion in selecting the right AMS for your clients is to consider future needs as well. Does the AMS you are investing in today allow for future growth without financial penalties? For instance, will you be charged for additional members or administrative seats? Do you have the option of selecting features that suit you today now while adding additional features as your needs evolve? For example, if you chose not to use an events management component for your AMC today, can you add it next year? How difficult is the addition and are there costs associated with doing so?

Associations and AMCS face many tough decisions regarding technologies that can help them grow. Make sure when you are selecting your AMS that you are not forcing yourself to continue to do things the way they've always been done. Select an AMS with flexibility and choose a vendor that understands success should never be penalized.