10 Awkward Questions to Ask your AMS Company

Critical Questions to Consider During Your Selection Process

PLEASE CONTACT WITH QUESTIONS

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STARTING AN AMS TRANSITION

Thinking of getting a new Association Management Software (AMS) solution?

Most associations need to upgrade or change their systems as they grow. At Ellipsis Partners we've spent the last two decades in countless engagements helping clients navigate the selection process to a better AMS.

ASKING THE RIGHT QUESTIONS

We've learned there are many dark secrets and strange loopholes in even the most advanced systems. But they are hard to ferret out.

The sales demos look great and appear to solve a lot of problems. Sadly, many realize well into the engagement that they didn't quite have all the correct information.

Let's look at the questions you need to ask to dig deep and avoid later frustration, in 10 critical areas:

1. Member Experience
2. Login and Authentication
3. Data Duplicates
4. E-Commerce
5. Training
6. Customer Support
7. Reporting
8. Data Conversion
9. Upgrades
10. Cost

#1: MEMBER EXPERIENCE

WHAT CAN WE REALLY CHANGE?

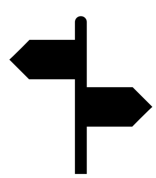
The demo screens typically look fantastic. You can already imagine your organization's logo on the page and the new easy join and renewal processes. But now is the time to ask some sticky questions.

- What exactly can I change on the screens the members see? Can I change the field names, the page layout, the instructional text?
- Are those changes something that I can do? Can a Customer Support rep do it? Or do I need developer involvement?
- What do those changes typically cost?
- Does the system have branching logic so that the same screen can have different information for different members?

TIP:

The branching logic is important if you want to ask your student members their graduation date, but don't want to ask that of your longtime members.

All these questions target whether you'll be able to offer members a tailored experience.



#2: LOGIN AND AUTHENTICATION

WILL YOU MAKE IT SUPER-EASY FOR MEMBERS TO LOGIN?

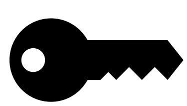
A lot of people assume all logins are the same, but there are recent advances that are very useful. Yet stumbling blocks to login remain that are frustrating to members because it slows down an experience they expect to flow quite easily.

A poor login experience reflects very badly on your organization. If members can't trust you to do a simple login, how can they trust you to manage their data?

- How easy is it change my password? Is there a way to do it online, or must I wait for a verification email. How fast is the verification email delivered? Can it be a text to my phone?
- How often is the reset password email blocked?
- Do you support an external tool for authentication? Can I put Azure or Okta in place for logging into your system?
- Do you support multi-factor authentication?

TIP:

Some of these might be questions to ask the organizations you contact for reference checks of your proposed vendor. They can tell you if password reset emails get through or are blocked by their members' firewalls.



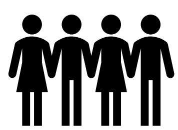
#3: DATA DUPLICATES

HOW DO YOU PREVENT & MANAGE DUPLICATE RECORDS?

Some level of duplicate records is inevitable – if we restrict account creation too tightly, we put the burden of good data entirely onto the shoulders of our members.

But a good system prompts members to retrieve their prior account, and makes it easy to do so. It also makes it easy for staff to manage and remove duplicate records.

- ❖ Does the system check for duplicates when key data has been entered?
- ❖ What about when registering for an event? Is duplicate detection active then?
- ❖ What data do you use to identify duplicates e.g. First Name, Last Name, Email Address? Can I add in others?
- ❖ What is the duplicate merge process like? Can I select different fields from both records? Does the transaction history transfer to the new merged record? Do certifications move to the new record?
- ❖ Can a single member ID hold multiple primary contact roles for different organizations? Or must those be different records?



#4: E-COMMERCE

DO YOU MAKE IT WILDLY EASY TO TAKE MY MONEY?

If members are ready to pay, we don't want to put any unneeded barriers in front of them. Ideally, we want a flexible, modern shopping cart and checkout experience.

- Can I add different types of transactions to the same cart, such as membership and event registration? What about a book purchase with a webinar?
- If one of those transactions is membership, is the logic in place to then discount the other transactions to the member price?
- What payment processors does the system support, and will I have to leave the one you have for a new one? If so, will you meet or beat the fees I'm paying?
- Is there a way to pay an invoice without having to log in?

TIP:

The ability to pay invoices without logging in is really useful in two areas.

One is taking donations online. It's great to click on Donate Now, fill out the credit card, and complete payment.

The other is where members can forward their dues invoice to their accounting staff for payment. There is no need to force the accounting staff to create a profile on our AMS.

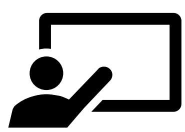
#5: TRAINING

DO YOU DO REALLY GOOD TRAINING?

You're going to need a lot of training to foster adoption of the new system. You'll need more training than you realize, including initial familiarization training for the project team, full pre-launch training for all staff, onboarding sessions for new staff, and advanced training for your power users.

It's vitally important to ask these questions now or risk getting far less than you bargained for.

- Who are the trainers? Is it the configuration team? Or are there dedicated trainers who are more skilled at adult education?
- Do the trainers know our specific configuration, or just the demo version?
- How will you support us when we have staff turnover?



#6: CUSTOMER SUPPORT

CAN I TRUST YOU TO SOLVE OUR PROBLEMS?

When associations leave their AMS, it's not always because the software itself doesn't work, but because they no longer trust their AMS company to care about the problems they face or that they will really work to solve them. This might be shown in tickets that lie open for months, or fixes that are due in some distant release.

Ask questions now, of both the AMS company and the reference organizations, that get to the real experience of customer support.

- What is the average open time of your support tickets opened in the last month? What are the most open tickets in your system for currently?
- What specific steps do you take to make sure the system continues to fit clients over time? What do you do to retain clients?
- If you have integrated your system with 3rd party applications as part of the implementation process, and the client has an issue with integration or a question about how something works, who do they contact for support? You or the 3rd party?

TIP:

Often the AMS sales team will affirm how easy their system integrates with other platforms through APIs but are quietly assuming that another company will do the work to figure it out. That may take longer and cost more than the costs in the proposal.

#7: REPORTING

CAN I GET MY DATA BACK OUT?

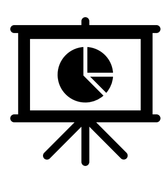
A major reason that associations give for moving to a new AMS is for better reporting and business intelligence. Staff need to pull and interpret good data. These thorny questions can take the wind out of the sales pitch.

- Can a single query pull from every module at once?
- If not, what are the limits?
- What if you need something complex, like a report showing members that attended the last annual conference where their organization's office address is the same state as the event location AND who hold a certification.
- Who develops those reports? What is the typical cost?
- Can I change parameters in your standard reports and save them?

TIP:

Difficulty in reporting is not only a system interface issue. It's also about the structure and cleanliness of your data being reported upon. And not everyone can understand the rationale or history of all the different addresses you maintain.

So while all staff may want to pull their own reports, you might want to leave that in the hands of an experienced user for the first months after launch.



#8: DATA CONVERSION

HOW MUCH OF THE DATA MIGRATION WILL YOU DO?

Most times, the majority of the data conversion work falls to the association staff. AMS companies provide a template which you then fill with extracts from your current systems.

Working through issues with data conversion is often a surprise, because by then you are deep into the implementation project. So it's good to ask the key questions upfront.

- ❖ Do you help prior to conversion with deduping and other data hygiene?
- ❖ Do you provide the data template?
- ❖ Do you help verify and test the data once converted?
- ❖ How many times do you anticipate migrating data?

TIP:

Be ruthless in deciding what data should not be brought over. The last thing you want to do is clog up your new system with obsolete or unusable data.

Consider a data lake as a repository for old data that gives you trends in membership or events. Leave the new AMS to focus on being a transactional system and a record of relationships.

#9: UPGRADES

HOW PAINFUL AND EXPENSIVE ARE UPGRADES?

Upgrades are a major area of maintenance and are never fully frictionless. The upgrade process can be regular and predictable or overwhelming and expensive. Good questions will tip you toward a more reliable relationship.

- What is the process for getting new versions of software?
- Is it automatic, mostly, or must it be planned and more hands-on?
- Are upgrades free, or will there be costs for developers' time to install and test?
- What impact will the upgrade have on our custom configurations?
- Will this require staff time to prep, stage, test, and other QC elements?
- What if the upgrade doesn't work? What next?

TIP:

Even if the upgraded software is included in your license fee, there is often a cost involved in having your AMS company finding and fixing bugs, and implementing the tested upgrade. Since this is under the heading of 'professional services', it may not be included in your initial cost estimate. The questions above help you figure out what the upgrade process really entails.

#10: COSTS

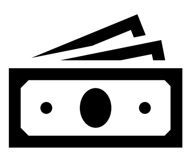
HOW DO WE AVOID COST SURPRISES?

Cost is all over the move to a new AMS. We've already mentioned a few key questions, but here are more.

- What are the cost drivers of the project? Are these truly expensive things that we must have, or is there a cheaper way to achieve results we can live with?
- Is the estimate guaranteed?
- What are the typical extra services costs in the first two years?
- Are we going to need a FT- or PT-staff member to operate it? Or a third-party implementation company?

TIP:

See if you can include the RFP in the contract. That way, you have a detailed description of what functionality was agreed to as well as the cost to be paid.



CONCLUSION

Upgrading to a better AMS for your organization is a must for a healthy, growing organization.

The selection process will be critical in not only identifying the right one, but in determining how much of the association's time and money will be tied up installing, learning, and maintaining something new. Being pointed in your questions upfront can make it a far more positive experience down the road.

An AMS consultant, like Ellipsis Partners, can help you find the right options, ask the right questions, and make the right selection. Our knowledge of the AMS solutions in the market, and how they have performed with other associations, gives you a depth of expertise that give you confidence in managing your AMS selection and transition.