

Prepare to Add These 9 Unexpected Responsibilities to Your Workload During an AMS Implementation

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STARTING AN AMS IMPLEMENTATION

An AMS implementation project is a vast unknown full of “things you don’t know you don’t know.” Although AMS companies describe their software as ‘out of the box,’ you can’t just ‘open the box’ and start using it. You have a lot of work to do before launch—a long list of project responsibilities you may not have expected.

To help you avoid unwelcome surprises, this guide walks you through nine of those responsibilities. It’s best to know about these tasks up front so you and your colleagues can plan for their impact on your regular workload.

WHAT YOU DON’T HAVE TO WORRY ABOUT

It’s not all on you. Your AMS partner is in charge of getting the technology right. You can count on them to handle:

- Software development and configuration
- Project management—but for their team, not yours
- Software testing
- Data—once you give it to them
- Training
- System operations and upgrades
- Support

Because your AMS company has done this hundreds of times before, they have dependable processes to guide them through their responsibilities. But how do you know what your team is supposed to do?

Your AMS partner should tell you about your staff’s responsibilities, but don’t wait for them to volunteer that information. Find out well in advance what to expect so you can make space in your schedule for the additional workload or find people to help. Ultimately, your team is responsible for making your new AMS come to life and deliver the business outcomes your association expects.

#1: SOPS–THE HOLY GRAIL

SOPs are standard operating procedures. Despite their humdrum name, SOPs are the answer to everything. They translate business processes into AMS speak and AMS processes into everyday English.

SOPs explain how and why things work the way they do in your AMS. They outline the steps for processes, with screenshots as illustrations. For example, SOPs detail the steps to take when:

- Adding a new member record.
- Processing a dues or registration payment.
- Adding a member to a committee.
- Changing someone’s contact information.

If you’re creating SOPs from scratch, start them as soon as possible. Take advantage of this opportunity to document and assess existing business processes and procedures related to the AMS to see if you can find more efficient ways to operate.



Your SOPs come in handy throughout the project, such as during:

- Initial testing of each iteration of the software as it’s delivered
- Final user acceptance testing
- Staff training and onboarding
- User permissions—who gets access to what and why
- User reference manual
- Data governance guidelines for data entry and management

SOPs are a living document full of institutional knowledge that your colleagues and those who follow behind them will refer to time and again.

#2: SIGN-OFF

This responsibility ensures you and your AMS partner are on the same page. It's *your* job to say when something is done. Yes, you have that power! And the first time it happens, it can be a bit of a shocker that the weight of the project's success lies on you! The sign-off responsibility could also belong to two people—the project manager who has the knowledge to say when something is complete and the executive sponsor who has the authority to confirm it.

A sign-off confirms and gives the stamp of approval to the:

- Project plan's alignment with the Statement of Work (SOW)—a document developed by the vendor describing the project's objectives, scope, deliverables, etc.
- Project schedule
- Vendor's discovery outcomes: requirements, configurations, and workflows—everything they must do to deliver the expected system
- System launch

Build time into your schedule to review these documents and to discuss questions and issues with your AMS partner. Anything you miss could result in a change order, additional costs, and schedule delays.



#3: INFORMATION



To configure the system, your AMS partner needs information about your organization, processes, and business goals. You'd be surprised how much information and intel is stored away in different nooks and minds of your association. Start getting your hands around this information during the requirements gathering process so you completely understand all AMS-related data and processes.

Information lives in many places:

- Internal documents—membership and registrations forms, and rogue databases (spreadsheets) maintained outside the AMS
- Undocumented processes and procedures—routine processes, such as a weekly registration update sent to the event team or finance knowing when a meeting is closed out
- Data and processes of related entities, such as the foundation, PAC, and corporate partners

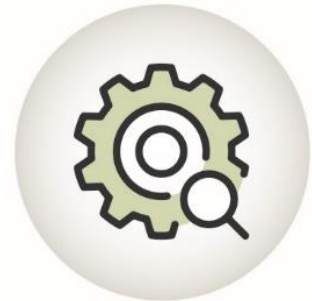
People take this information for granted and don't even think about it unless you uncover it by digging deep and asking lots of questions—that takes time. You and your AMS partner must know all the nuances of association operations, so the AMS delivers on its promise.

#4: INTEGRATIONS AND THIRD-PARTY ADD-ON SOFTWARE

INTEGRATIONS

Because your AMS is part of a technology ecosystem, it must be able to exchange data with other systems, such as your CMS, LMS, accounting software, virtual event platform, etc. Your AMS partner should provide information about its API—the code that makes this data exchange possible.

Before choosing an AMS provider, discuss integration capabilities and responsibilities. Some AMS companies handle integration, but don't count on it. If integration is your responsibility, you must find, manage, and pay another company to handle the integration of your AMS with other systems.



THIRD-PARTY SOFTWARE

You may also need third-party software, if it's not built into your AMS, such as:

- Address verification software
- Bulk email delivery
- SSL certificates

It's your responsibility to review your AMS partner's recommendations (or do your own research), find a vendor, and manage that relationship too.

#5: DATA

DATA CLEANSING

It's your responsibility, not your AMS partner's, to ensure the data in your new AMS is clean data. Take the old saying seriously: "Garbage in, garbage out." The trust people have and the value they place in your new AMS depends on the reliability of its data.

Data cleansing is nobody's idea of a fun project, but don't even think about procrastinating because it takes longer than you'd think. Before migrating data to the new AMS, find all the places it lives now—like spreadsheets, Outlook, isolated engagement data, and comped speaker lists. Consolidate it in your old AMS and clean it.

- Match records from different sources for the same people and identify which has the most current data.
- Remove duplicate records.
- Fix typos and formatting errors.
- Archive historical data you won't use but may want to reference.

Don't move every bit of data into your new AMS. Only migrate data you plan to use.

DATA MAPPING

When migrating data from your old AMS to your new one, you must know exactly where each field goes. Picture your systems as two mansions, each containing dozens of rooms. Make sure the information in the laundry room of the old house goes to the laundry room in the new house.

You must help your AMS partner understand each data set's structure, location, and relationship to other data so they can put it in the right place in the new AMS. Vendors provide structured spreadsheets for this data mapping process.



DATA MIGRATION

Once the data migrates to the new system, verify that everything ended up in the right place and in the right relationship with other data. By the way, this is why an AMS is called a 'relational database'—now you know!

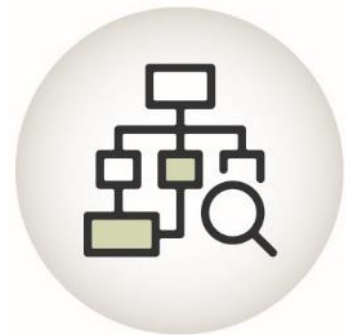
Run a set of reports in each system to make sure the data went over correctly, including reports on current data—such as open invoices, active members, and event registrations—as well as reports on historical data you're migrating.

#6: TESTING

Your AMS partner tests the software continually, but you also have testing responsibilities throughout the project.

- Confirming the system’s initial setup is as expected.
- Testing configuration and functionality as it’s released—aka sprint testing.
- Doing the final end-to-end testing—aka user acceptance testing.

You’re responsible for creating test plans or scripts to use during testing. Think about all the things users (staff, members, and customers) will do in the system and what results they expect, for example, different ways they might enter a name or address, make a query, complete an application, make a purchase, etc. Get in your AMS, wrangle it to the ground, and ensure it performs as expected.



Pro tip: A benefit of developing thorough system requirements and SOPs is using them as a reference when developing demo scripts and test plans.

Your AMS partner may provide access to a project management platform to report issues during testing. Document, discuss, and resolve all issues with them after testing.

Testing often requires the participation of colleagues from across the association. Make sure you reserve time on their calendars and confirm they have their supervisor’s permission to take time away from their regular duties—this is where an executive sponsor’s influence is helpful.

#7: TRAINING



Switching from one AMS to another is like going from ship captain to plane pilot—you're still 'driving' a vehicle, but it operates quite differently. You and your colleagues need more training than you'd imagine to successfully make the switch.

At the start of implementation, your AMS partner provides familiarization training on a bare-bones system. Get in there and become comfortable with the way it looks and works so you can confidently answer your vendor's questions during discovery.

You and your colleagues will, naturally, receive pre-launch training. But you must also anticipate (and budget for) future training:

- Refresher training to reacquaint staff with functionality they haven't seen since pre-launch training
- Onboarding training for new staff
- Advanced training for superusers
- Training on upgrades, updates, and requested enhancements

#8: SETTING EXPECTATIONS

Frequent, honest communication about the AMS with your co-workers builds trust, encourages buy-in, and sets expectations. If you don't tell them what to expect, they'll complain about what's different or what's missing in the new AMS. Save your sanity by ensuring they know what features and functionality to expect and not to expect.



Don't make a big deal of things with members, but pinpoint how the new AMS will improve their experience.

- Introduce the member portal and how it's different from the old one.
- Show them how to create or reset their username and password.
- Record a few short videos walking them through new procedures.

Since your board approved perhaps hundreds of thousands of dollars for this technology investment, they have high expectations. Tell them the first month with a new system is always difficult, but improvements and new capabilities are on the horizon.

#9: CONTINGENCY PLANNING

Prepare to deal with the unexpected. As you create the project plan and schedule, assess potential risks:

- AMS or integration vendor delays
- A shift in team members' focus because of association events and projects
- Association or vendor staff turnover
- System failures and bugs

Discuss and plan how you'll handle these situations and other unwelcome surprises if they arise.



Your team's responsibilities during an AMS implementation are admittedly daunting. We hope this guide helps you understand what lies ahead and how much your workload will change, so your team can figure out how to schedule time for and manage these responsibilities.

An AMS consultant, like Ellipsis Partners, can take the project management lead and guide you through these challenges. Our expertise and experience help you avoid timeline delays and budget increases caused by the unexpected. Juggling AMS project responsibilities with your regular workload is nearly an impossible task—and is definitely a recipe for burnout. Let us do the heavy lift so you can keep your focus on your members and mission.