

AMS FEST

The Association Workload: 9 Surprises to Manage

Moira Edwards, MS, CAE
President, Ellipsis Partners

Our Goal for Today



Give you an understanding of YOUR workload during an AMS implementation project.

- SOPs
- Sign Off
- Information
- Testing
- Training
- Data
- Communications
- Other Technology
- Contingency Planning

AMS Company Focus

- Technology
- Project Management
- Testing
- Data
- Training
- Operations
- Support



You are Responsible for Bridging the Gap



Photo by [Adrien CÉSARD](#) on [Unsplash](#)

Standard Operating Procedures



Photo by [Kyle Cottrell](#) on [Unsplash](#)

1. Standard Operating Procedures



- Initial Testing
- User Acceptance Testing
- Training
- Use / Reference
- Access
- Data Governance

Sign Off



2. Sign Off

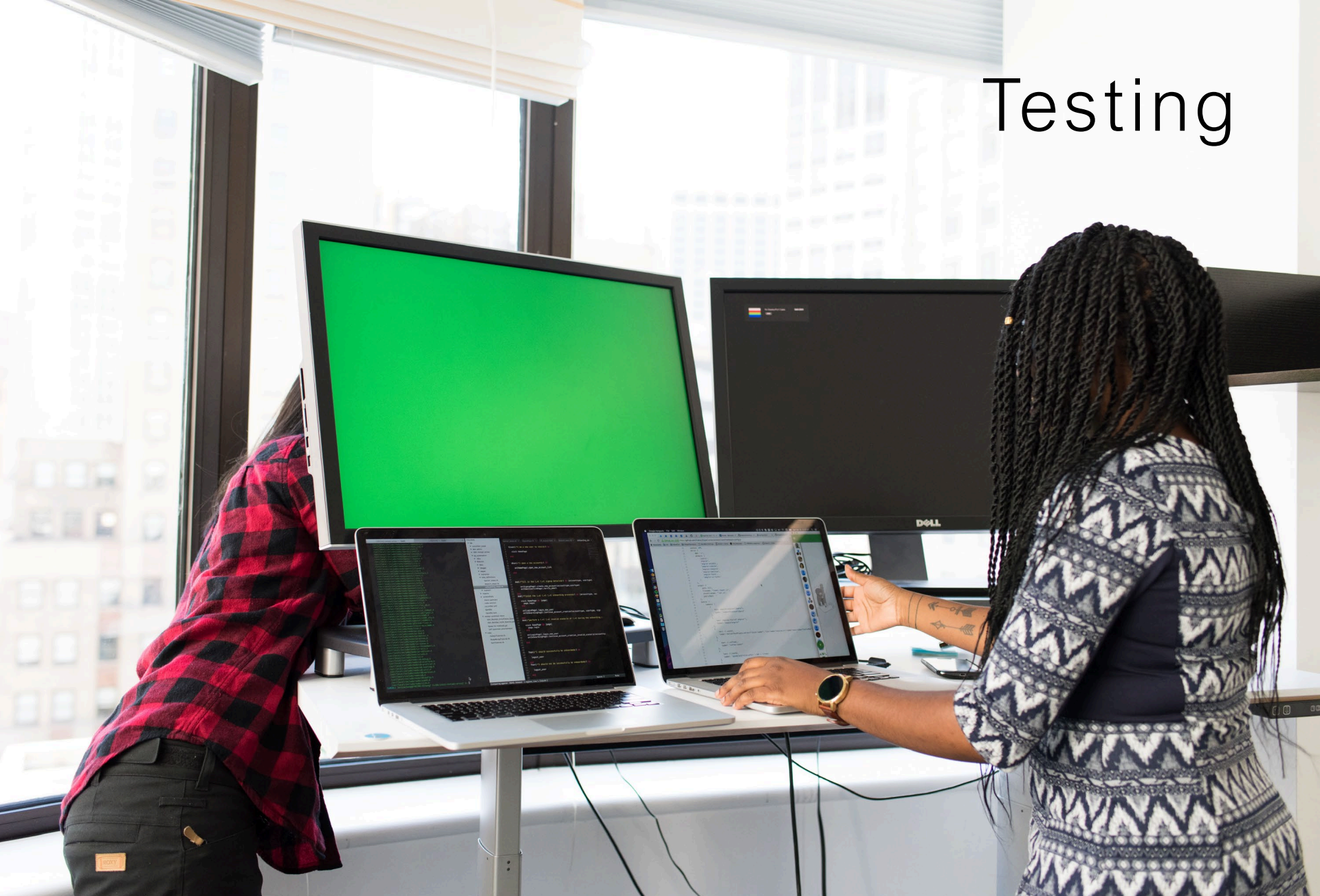
- Confirm the project plan against the SOW
- Review and approve requirements and system workflows
- Sign off on the system for launch

Information

3. Information

- Internal documentation
- Undocumented processes/procedures
- Related entities
(Foundation, PAC, strategic partners)

Testing



4. Testing

- Initial testing of setup
- Sprint testing
- Final end-to-end testing
(UAT - User Acceptance Testing)

- Create test plans
- Document results
- Report and track issues

Training

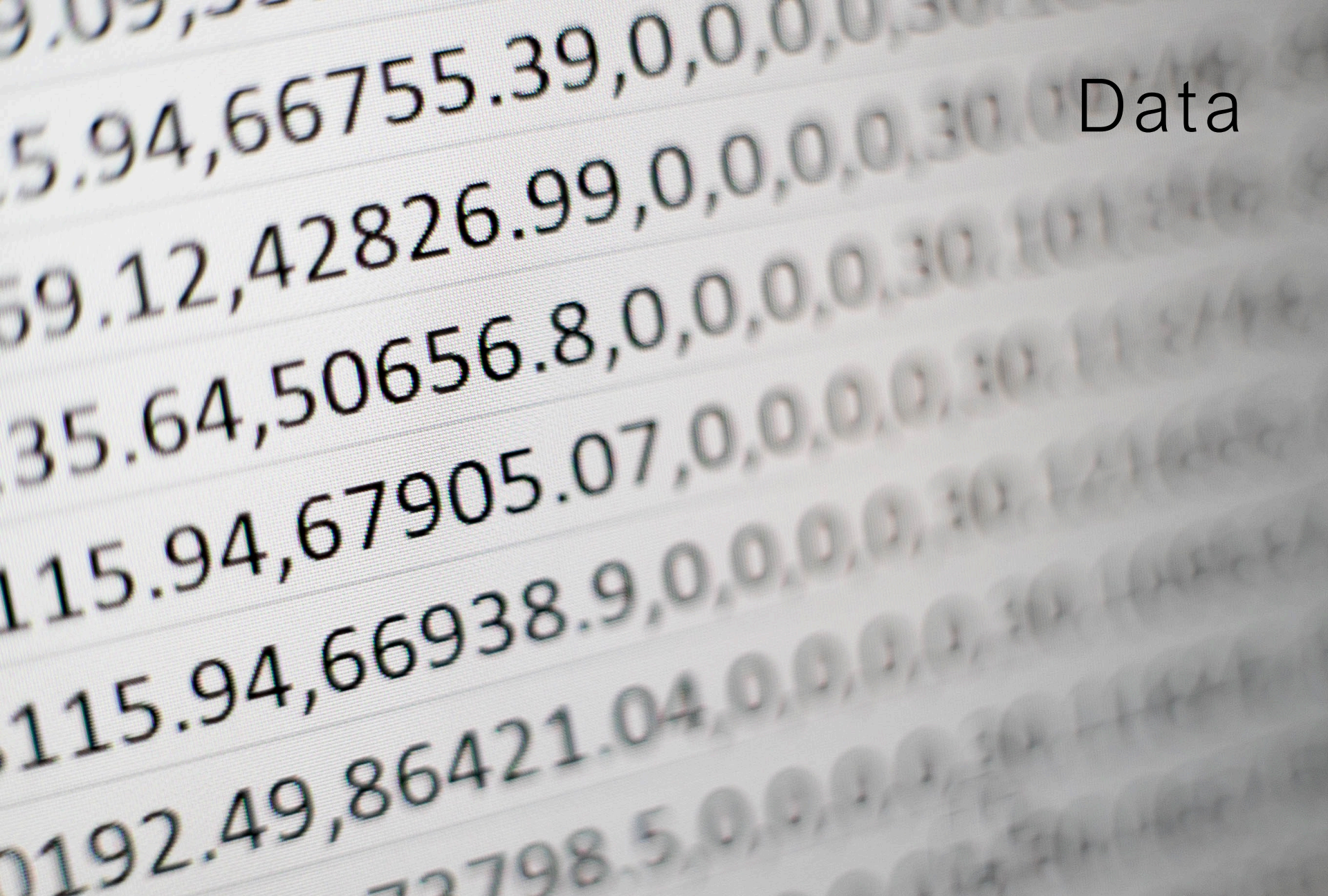


5. Training

- Familiarization
- Pre-Launch

- Refresher
- Advanced
- Onboarding
- Updates / Upgrades
- Requested Enhancements

Data



6. Data

- Data cleanup (duplicate records, capitalizations, typos etc.)
- Data mapping (understand data structure and place in structured spreadsheets)
- Verify data migration

Communications



7. ~~Communications~~ Expectations

- Member
- Staff
- Governance

Other Technology



8. Other Technology

- Integrations
 - Hire, manage, and pay integration vendors
 - Coordinate developers
- Third-Party Software
 - Procure third party add on software
e.g., address verification software, a provider to bulk send email, SSL Certificates

Contingency Planning



9. Contingency Planning

What will do you if ...

- The system fails at core tasks
- Certain integrations are not ready
- Key staff leave
- Major bugs are found

In our time together ...



Thank you

Enjoy AMS Fest!