

THE RIGHT FIT

A Quick Guide to AMS Selection for Associations

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THE PROJECT FRAMEWORK

PEOPLE

EVERYONE

- Listen as widely as possible
- Key operational staff

SELECTION TEAM

- Commit to reading every proposal & seeing every demo
- Communicate process updates back to the full team

CORE TEAM

- A Senior organization member
- Drives the process

... there may be overlap here, especially in small teams

TIMELINE

Allow at least 12 months total:

4–5 months	Select a system
1 month	Negotiate a contract
6–9 months	Implement

Ask yourself:

- What are your timeline constraints?
- What organizational deadlines apply?
- What other tasks must be included?

BUDGET CONSIDERATIONS

Implementation Costs One-time fees for setup, data migration, training, and configuration.	Annual Ongoing Costs Licensing, support, maintenance, and integration fees each year.	Often Overlooked Extra training, future phases, integration builds, data analytics tools.
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EVALUATION CRITERIA

Functionality Meets critical needs? Integrates with your stack?	Cost Fits budget? Track record of staying on budget?	Fit Right vendor relationship? Matches your IT capacity?	Risk Modern platform? Happy users? Stable funding?	Integrations Open API? Plug-ins available? Who does the work?
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"When people show you who they are, believe them the first time."
 — Maya Angelou

AMS resources & vendor lists: ellipsispartners.com/resources | effectivedatabase.com/ams-vendors



REQUIREMENTS & RFP

GATHERING REQUIREMENTS

Look for what is *unique, costly, or critical.*

- Listen broadly — focus on outcomes
- Ask about pain points and what works well
- Ask about future goals
- Ask why things are done that way
- Ask why things are important

Level of Detail

High	General categories
Medium	Requirements matrix with context (recommended)
Detailed	User stories / basis for software development

WRITING YOUR RFP

Include in every RFP:

- Organization background & business objectives
- Project timeline
- Overview of functional areas
- Specific questions and needs
- Vendor background questions

RFP Best Practices:

- Number every item for easy reference
- Use A/B/C priority (must-have vs. nice-to-have)
- Make responses score-able
- Include space for open comments on each question
- Note the response will be part of the contract
- Always ask for price

Key Vendor Questions:

- How long in business? How many staff & clients?
- How many clients on this specific software?
- Do you have a users' group?
- How do you manage documentation & training?



REVIEWING & SELECTING

SCORING PROPOSALS

5 Things to Look For:

- Did they provide all requested info?
- Did they show understanding of your specific needs?
- Did they add value and knowledge?
- Do their technical solutions fit your environment?
- Is cost within acceptable range for the value?

Functionality Score:

- Baseline included in configuration
- Configuration available (with cost)
- Customization required
- Third-party integration needed
- Not available

DEMOS & REFERENCES

A Great Demo:

- Script highlights YOUR key features
- Not scheduled same day as another demo
- All attendees have full agenda & info in advance
- Attendees feel comfortable asking questions
- Debriefing happens immediately afterward

Reference Checks — Ask About:

- Most disappointing issue & how it was handled
- Were timelines and budget met?
- How was communication during & after go-live?
- Would they use the vendor again?
- What would they do differently?

"It is not a lack of love, but a lack of friendship that makes unhappy marriages."

— Friedrich Nietzsche



CONTRACT, IMPLEMENTATION & INTEGRATIONS

CONTRACT CHECKLIST	IMPLEMENTATION TIPS	INTEGRATIONS
<ul style="list-style-type: none"> Exit strategy — what happens to your data if the vendor is acquired? Right to export all data at any time Payment tied to deliverables, not dates “Undisputed” invoices — not just “all outstanding” Formal change control process Data security & privacy clause Auto-renewal terms and termination notice 	<ul style="list-style-type: none"> Plan to spend 50% of your time on implementation Clear your desk of competing work Define roles & responsibilities for both sides Continuously review business processes to fit the software Convert as little data as possible Prepare for extensive testing Push scope creep to Phase 2 & 3 	<ul style="list-style-type: none"> An ‘open API’ is not always simple — needs a developer Think through what you actually need vs. want Costs vary widely — budget accordingly Integration tools: Zapier, Make, Boomi, MuleSoft Association-focused: FusionSpan (FusionConnect), AMS Geek (Data Sangria), 501Works (Mojo), Shuffle Labs (Shuffle Exchange)



KICKOFF MEETING CHECKLIST

Every kickoff should cover:

- Establish a clear project purpose
- Identify and align on the goals
- Agree on the timeline
- Confirm roles and responsibilities
- Agree on communication frequency and tools (e.g., Basecamp)

Need help with your AMS search?

Ellipsis Partners specializes in guiding smaller associations through technology selection and implementation.

ellipsispartners.com



AMS Vendor Lists & Resources

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