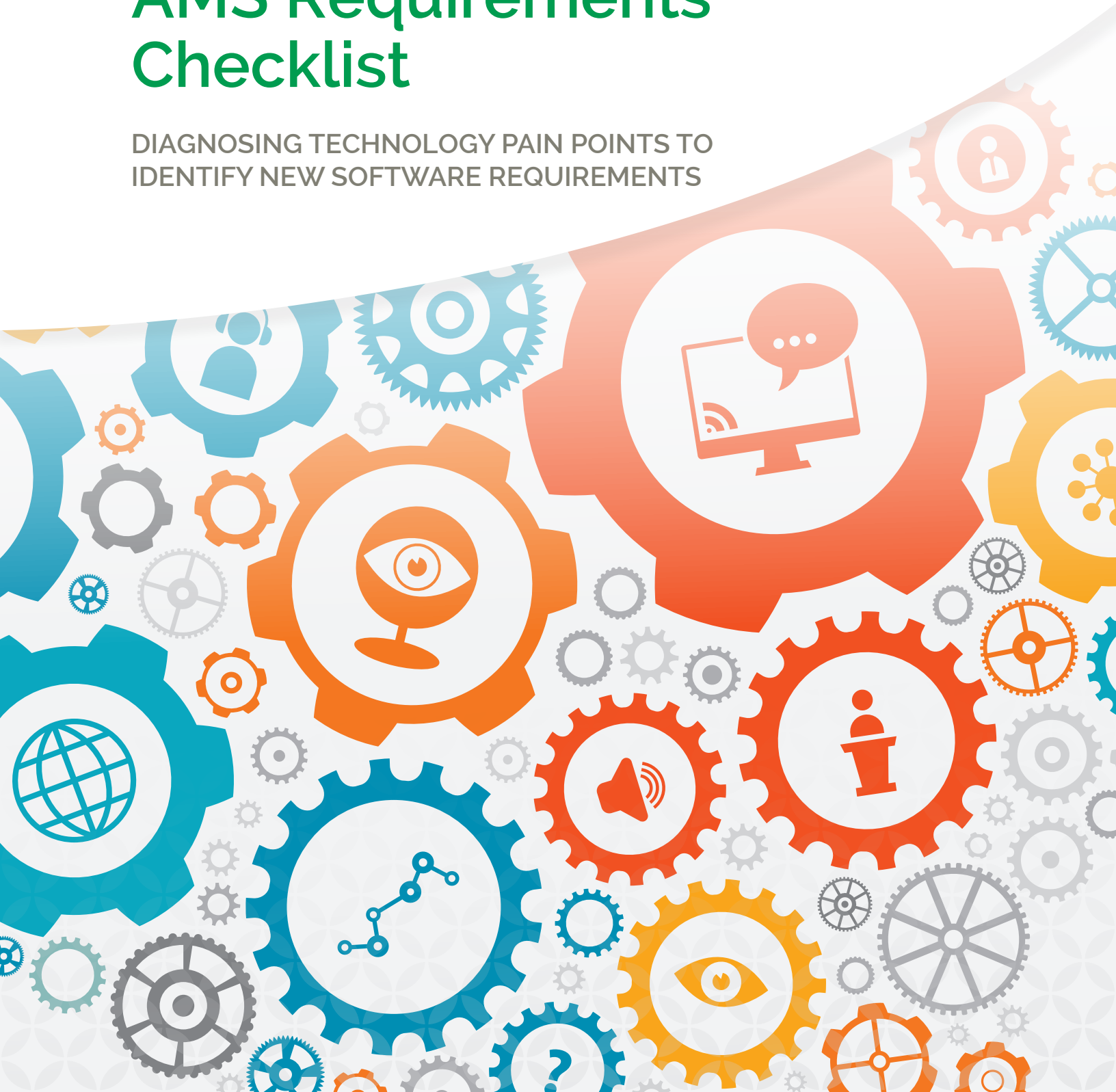


AMS Requirements Checklist

DIAGNOSING TECHNOLOGY PAIN POINTS TO
IDENTIFY NEW SOFTWARE REQUIREMENTS



What's Ailing Your Association?

When thinking about investing in Association Management Software, diagnosing the pain caused by your current technology is critical to understanding what your organization needs from a future system. Review this checklist to identify what you should look for in a new AMS.



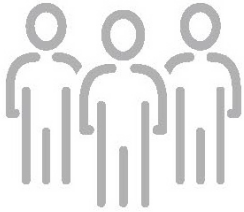
You're searching for a solution. Perhaps it's time for a change. Your employees and team members have become frustrated with the old way of doing things, having to dig through multiple data silos or suffering through manual processes to get work down.

You have been tasked with scouring the marketplace to find the right solution. You've started looking at software to help fix the problem. Ultimately, you want to establish a relationship with an innovative association management software (AMS) provider that will provide a solution which not only supports your membership, but will also scale with your association as it looks ahead to the future.

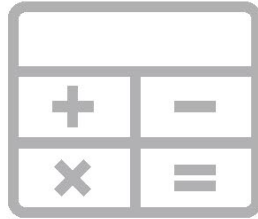
Over the next few pages of this brief, we'll discuss the issues many associations face when it comes to managing their organization and how the capabilities of a modern software can help alleviate these pain points.

If these are problems you and your staff regularly experience, it's time to find a solution.

What's Happening In Your Current System?



What staff members will use the AMS?



How much money are you losing by using the wrong system?



What data needs to be in your central database?

- ☐ **Has your organization changed over the years? Have your membership schedules changed, and your current system can't keep up?**

Your AMS should have the ability to add custom objects and an unlimited amount of custom fields as well as a full suite of configuration tools. This allows your software to scale with you as your organization changes and grows.

- ☐ **Do you have data all over the place? Does it take you hours to combine spreadsheets from different systems to get the information you need to make decisions?**

You need to establish a single database of record - your AMS should serve as a central repository to store all your data for membership, events, financials, and much more.

- ☐ **Do you have applications that are disconnected from your main database?**

Your AMS should be able to easily integrate with other systems to extend and add functionality while eliminating data silos.

- ☐ **Are you stuck with the base software that can't be tailored to your organization's ever-changing needs and processes?**

That's what happens if you've got old software. A new SaaS AMS that's cloud-based with a robust API will provide you a customizable platform that can be configured as needed.

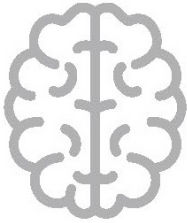
- ☐ **Is it expensive to upgrade your current system?**

With a cloud-based AMS, upgrades are included in the price of your annual agreement.

- ☐ **Do you know who has been making changes in the system?**

A modern AMS keeps a log of all the changes made to all records in your database.

How Are Things Working Behind The Scenes?



Do you need an engineering degree to use your AMS?



How is the member experience impacted by your AMS?



Is your AMS teaching you anything about your members?

- ☐ **When you make changes in the system, are they reflected in real-time for what your members see in their portal?**

If you don't have an integration between your member-facing website and your database, then the changes might have to be manually updated by your IT staff to be reflected in the content. This is one of the main reasons your member portal needs to be linked with your AMS database.

- ☐ **Do you need a skilled developer to make changes in your database?**

Making changes shouldn't require the services of a professional engineer. It should be easy for end users to make information updates.

- ☐ **Do your members have to call in to make changes to their accounts? Is it frustrating for them, or for your staff who have to make those updates?**

Your system should allow members to manage their own information, membership renewal and more by making real-time changes through their portal.

- ☐ **Can your members see an overall view or full history of all their activities with your association?**

Your members will expect to see their complete personal history online, and a modern AMS can provide this by serving as the central repository for all membership interactions.

- ☐ **Do you have too many duplicate entries in your current CRM system?**

Your AMS should have the capability to automatically detect duplicate records upon entry.

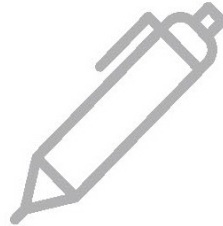
- ☐ **Is your membership stable? How is dues revenue performing? Are you searching for ways to improve non-dues revenue?**

To keep retention high, to stabilize or increase dues revenue, and create additional non-dues revenue streams, you need a way to communicate effectively with your members to understand the types of new products, programs or services they want from your association.

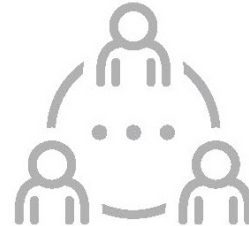
Membership Management As A Central Function



Are you able to
configure different
membership types?



Can your members
own their own
experience?



Can you offer tied
organizational and
individual memberships?

- ☐ **Do you have two completely separate databases to track your membership organizations? Is it impossible to pull information from both?**

It's essential for your team to track multiple membership organizations and all records in a central place.

- ☐ **Would you like to be able to offer extended term memberships, but your software won't allow it?**

Your AMS should allow you to create options for your members, whether it's paying month-to-month, or purchasing five years of membership up-front.

- ☐ **Can you track different types of membership periods?**

A new AMS should give you the ability to allow for anniversary and calendar-based memberships.

- ☐ **Does your current system allow people to get their company benefits, such as discounted membership rates? Or does changing a company membership require manual effort by your staff?**

Your AMS should include the capability for memberships to "flow down" from an organization to an individual record.

- ☐ **Do your members have any digital self-service capabilities or does it put a strain on your staff?**

Your AMS should have an online portal for members that allows them to register for events, purchase products, pay dues, and self-serve instead of calling you.

- ☐ **Do you have to use a separate system to host events? Can you tie event registration back to membership records?**

Your membership database and event management should be under the same roof so you can manage meetings, merchandise and sponsorships, plus have all the data tie back to an individual or organization.

Are You Experiencing Any of These Problems?



How much time does your account spend reconciling accounts?



Can you quickly update your board on key organizational metrics?



Are you able to manage your online store and inventory with ease?

- ☐ **Does it feel like you have no control over your financial processes? Are you having to manage accounting manually?**

Software should make it easy for you to manage batches for financial transactions, or defer revenue. If your membership invoices are inflating your accounts receivable, you can manage pro-forma invoices easily from the central AMS.

- ☐ **Are you able to track your association's foundation accounts?**

Your software should host and quantify separate business units and financial entities, such as charts of accounts for example, from within your central database.

- ☐ **Do you have to constantly pull information for board members who do not have access to your system?**

You should be able to schedule reports to be emailed directly to your board members, even automating these reports to show up in their email inbox once a week.

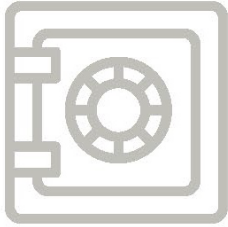
- ☐ **Is your current inventory management process prone to error? Are you often out of stock on items but the records you manually track don't indicate so?**

With the right AMS, you'll be able to track inventory, shipping and taxes, plus track usage of applied discount codes.

- ☐ **Can you determine if your team has sent an order out or not?**

Managing order fulfillment should be a simple process. When members purchase items, these should be added to a fulfillment batch to make it easier to track all of your orders.

Is Reporting an Absolute Nightmare?



Does your AMS make it difficult to get data out of the system?



Can you easily pull data that you need on a regular basis?



Are you empowered to make data-driven decisions?

- ☐ **Is it hard to get records out of your system, or you don't know how to pull the information you want?**

Your AMS should allow you to create searches across multiple tables and queries, then output in multiple formats. You should also have the ability to set criteria and outputs based on any field.

- ☐ **Does your staff have to constantly monitor members who haven't paid their dues and reach out to them? Is it impossible to bill your members monthly?**

An AMS should give you the ability to automate the process for communicating overdue invoice reminders. This same functionality also allows for recurring billing schedules.

- ☐ **Do you have the ability to save user-defined queries?**

A new software should allow you to save searches for on-demand use in the future without having to build your searches again from scratch.

- ☐ **Does your current system offer business intelligence functionality?**

Innovative technology can now provide deeper insight into your organization, allowing you to make better-informed decisions that can ultimately impact the member experience and overall revenue of your association.

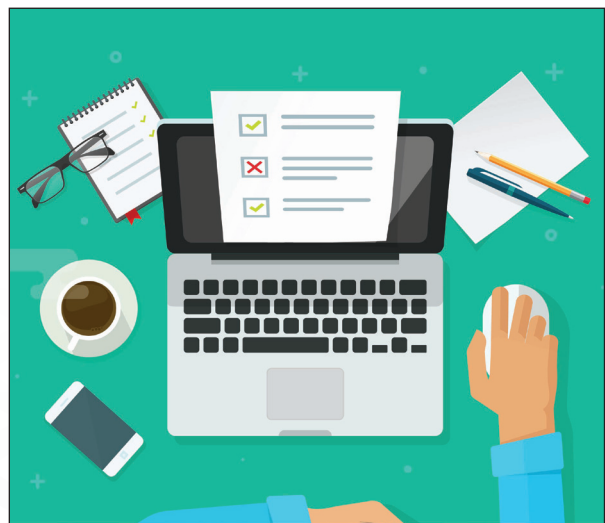


CONCLUSION:

**Did we hit one of
your pain points?**

**It's time to find a way to resolve the boxes you
checked.**

Diagnosing your key pain points is the first step to finding a cure for your association's woes. Technology with the capabilities to relieve this pain is available. If you can harness the power of innovative AMS software combined with reliable data, you'll be set up for success in the future.



We'd love to learn more about your AMS requirements. Contact us to get started.

(678) 606-0310
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MemberSuite is the premier software and services provider of association management solutions. MemberSuite harnesses the power of the cloud to deliver enterprise-class Association Management Software that enables modern organizations to accomplish every activity they need to serve their constituents. With dozens of modules, a fully-customizable platform and a dedicated professional services team, MemberSuite is changing the way modern associations do business.

NO
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We guarantee 100% you will know what you're getting, why you're getting it, how to use it, how long it takes to implement, and have support when you need it.

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