

WHITEPAPER

Association management software: Choosing the best platform for your association



Introduction

Is your organization preparing to invest more in its association management software (AMS)? If so, you're not alone! In the latest Association Trends Report, 32% of professionals plan to invest more in their management systems this year (up from 22% in 2024), the highest percentage in recent years.

Additionally, 62% of association professionals cite upgrading or integrating new technology as a top priority. Now is the time for your organization to invest in a new AMS. But before you rearrange your budget, you'll want to understand which platform best meets your organizational needs.

How? By learning the ins and outs of association management software and understanding what each type can offer your organization. This approach will help you weigh the pros and cons of different AMS platforms and determine the right fit for your association. Then you'll be ready to invest in the best technology for your staff and members.

Let's get started.

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"When you're acquiring an AMS, it's important to think long term since you're committing to 10, 15, maybe 20 years with your system. You want this to be a very long and successful relationship. The software is just one consideration—You'll want to dig into the size and scale of your vendor and their ability to support your solution. Asking questions about their years of market experience and reputation in the industry will help too."

— Rob Miller, MPA CAE, SVP, Association Strategy

What investments in management systems means for associations

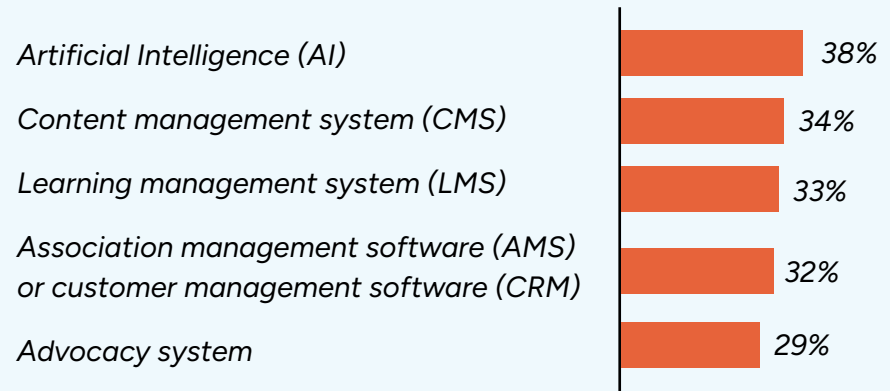
This year, association professionals' feelings about their tech preparedness are soft, with 40% reporting they feel somewhat prepared for the future and just 10% saying they are very prepared.

However, 63% of professionals say their IT budgets are flexible and increasing, compared to last year. This shift highlights an organization's readiness to adopt technologies that could better solve challenges or achieve goals with less manual time.



When it comes to technology, associations are looking for management systems that streamline operations and accelerate efficiency.

Here are association professionals' top investment choices:



With these research trends in mind, you can make the right preparations for your technological future.

Want to learn more reasons why associations are investing in technology? Download our latest research report today!

[Download now](#)

Types of AMS systems

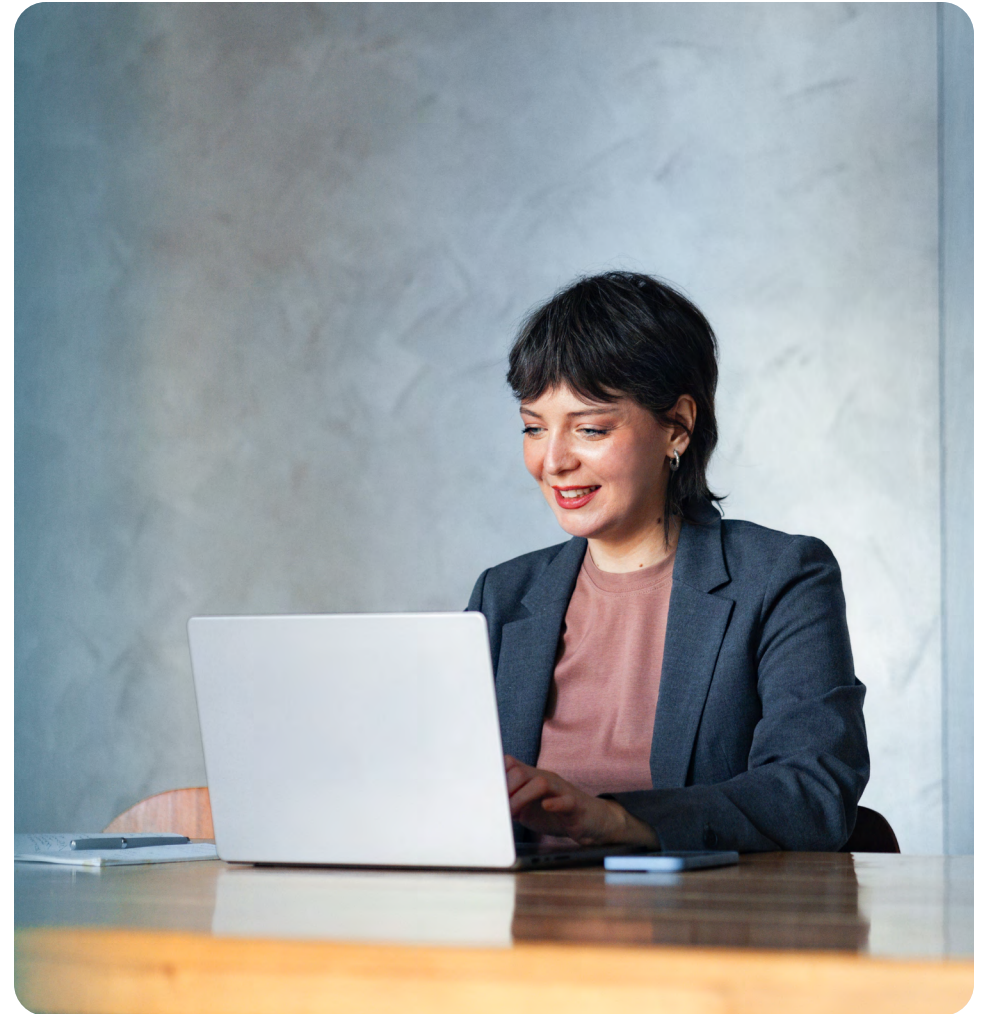
When it comes to finding the right association management software for your organization, it might be helpful to identify areas where your organization is looking to improve with new technology.

For example, is your staff experiencing time-consuming manual processes with your current software? You should look for an AMS that offers automation to streamline staff tasks. Does your organization suffer from data silos? You could benefit from a platform with integration options and enhanced reporting functionality so all your teams stay on the same page.

Here are some key factors you'll want to consider when choosing an AMS:

- ✓ Security and compliance
- ✓ Technology upgrade schedule
- ✓ Specific member needs
- ✓ Specific staff requirements
- ✓ Integration and scalability
- ✓ Vendor relationship

Identifying your organizational pain points will help you better prioritize your technological requirements and understand what type of AMS system is best for your staff and members.



"Use your members to strengthen your technology recommendations to the Board by seeking their feedback. If they aren't satisfied with your current services, or if they can't access your services easily, you need to make a change."

— Rob Miller, MPA CAE, SVP, Association Strategy

TYPES OF AMS SYSTEMS

Salesforce

Many membership-based organizations and associations are moving to customer relationship management (CRM) platforms as the foundation for their association management software (AMS). One reason for this trend: CRM is critically important to professional and trade associations. Knowing your members and tracking interactions, collaborating with your staff to deliver a better member experience, and gaining business intelligence on membership trends are more important than ever before.

For over 25 years, Salesforce has been constantly investing and improving what is already known as the best-in-class CRM. As a leader in CRM and service, Salesforce is an ideal platform for a modern AMS that puts members at the heart of an association's activities.



While not all AMS platforms built on Salesforce are the same, there are those that stand out from the crowd, and offer your association the following innovative features:

✓ AI and predictive analytics

Use AI tools to help your organization better understand its data, unlock actionable insights, and anticipate member behavior about future donations, events, fundraising, and more.

✓ Reports and dashboards

Visualize your organization's health and other key metrics with powerful association-specific reports and dashboards, empowering your staff to spot trends and move your mission forward.

✓ Automation tools

Save valuable staff time by streamlining manual processes through point-and-click actions, requiring no code.

✓ API and integration

API functionality allows your organization to extend your software ecosystem, ensuring you can connect your data across your AMS, [learning management software](#), [career centers](#), [event management software](#), and more.

✓ **Security and reliability**

Your data is personal and sensitive, containing information about both members and employees. Your AMS, built on Salesforce should follow data privacy best practices and security standards to ensure your information is always protected.

✓ **Person Accounts**

Person Accounts are a Salesforce feature, designed to support the way associations work. Salesforce Person Accounts empowers your teams to organize complicated membership structures, including both individual and organizational members. Person Accounts function as an account and a contact record combined, helping you to track and manage crucial details about constituents.

✓ **Salesforce AppExchange**

The [Salesforce AppExchange](#) is the most trusted enterprise cloud marketplace. With more than 12 million installs and over 7000 apps, organizations choose the Salesforce AppExchange to meet their technological needs.

“An AMS system built on Salesforce tends to be full featured with built-in capabilities around automations and AI and advanced analytics. It will offer deep CRM and AMS functionality for your association. However, not all AMS platforms are built the same in terms of regular product updates and innovation, so that’s something you’ll want to consider.”

— Matt Rist, VP, Product for Associations



TYPES OF AMS SYSTEMS

Microsoft

Transform your association's operations with an AMS built on Microsoft, empowering you to streamline member management, enhance engagement, and drive smarter decisions.

Here's what an AMS built on Microsoft can offer your organization:

✓ Smarter member management

Simplify every step of the membership journey with an AMS built on Microsoft. From onboarding to renewals, your staff can centralize member data and automate communications, events, and committee management.

✓ Data-driven decisions

Make informed choices with real-time insights powered by Microsoft Power BI. You can gain a 360-degree view of your organization, track member behavior and engagement scores, and uncover trends that elevate your impact.

✓ Microsoft ecosystem

Leveraging a Microsoft ecosystem can provide many benefits for your association—helping you streamline operations, enhance collaboration, and improve member engagement, all with the tools you already know and love.

"An AMS built on Microsoft makes it easy for your organization to connect with other Microsoft products, ensuring all your systems have a similar look and feel. A big advantage of a platform-based AMS is you're going to get the research and development from Microsoft and the AMS that tends to have a lot of value packed into improvements released year over year."

— Matt Rist, VP, Product for Associations

✓ Enhanced website functionality

Empower your members and staff with personalized, self-service tools directly on your website. You can easily manage content access, deploy interactive forms, and support customized online profiles.

✓ AI that works for your organization

Leverage built-in AI through Microsoft Copilot to automate tasks and create content for your organization, supporting your team in streamlining key processes.

TYPES OF AMS SYSTEMS

Propriety AMS

A proprietary AMS offers a tailored, strategic advantage for associations looking to elevate their operations, member engagement, and long-term growth. Choosing the right proprietary AMS can be a game-changer for an organization looking to scale with confidence.

Here's why:



✓ Purpose-built for associations

Proprietary AMS platforms are designed specifically with associations in mind. Some of these AMS vendors have over 20 years of experience serving associations and nonprofits. They offer specialized features like membership lifecycle management, certification tracking, and committee coordination—tools designed to support your mission, not just generic business processes.

✓ Seamless integration and configuration options

Unlike generic systems, proprietary AMS solutions often integrate with your existing tools and can be configured to match your branding, processes, and member experience. Whether you need to configure member types, automate renewals, or tailor event registration forms, these systems help you build a cohesive digital ecosystem for your entire team.

✓ Centralized member data

Proprietary AMS platforms centralize member data across departments, giving you a holistic view of engagement, activity, and history. This unified database supports better decision-making, personalized communications, and more effective member retention strategies.

✓ Enhanced member experience

With integrated portals and self-service tools, members can easily manage their profiles, register for events, renew memberships, and access resources. Choose a proprietary AMS to support an intuitive user interface and improve member satisfaction.

✓ Scalable and secure

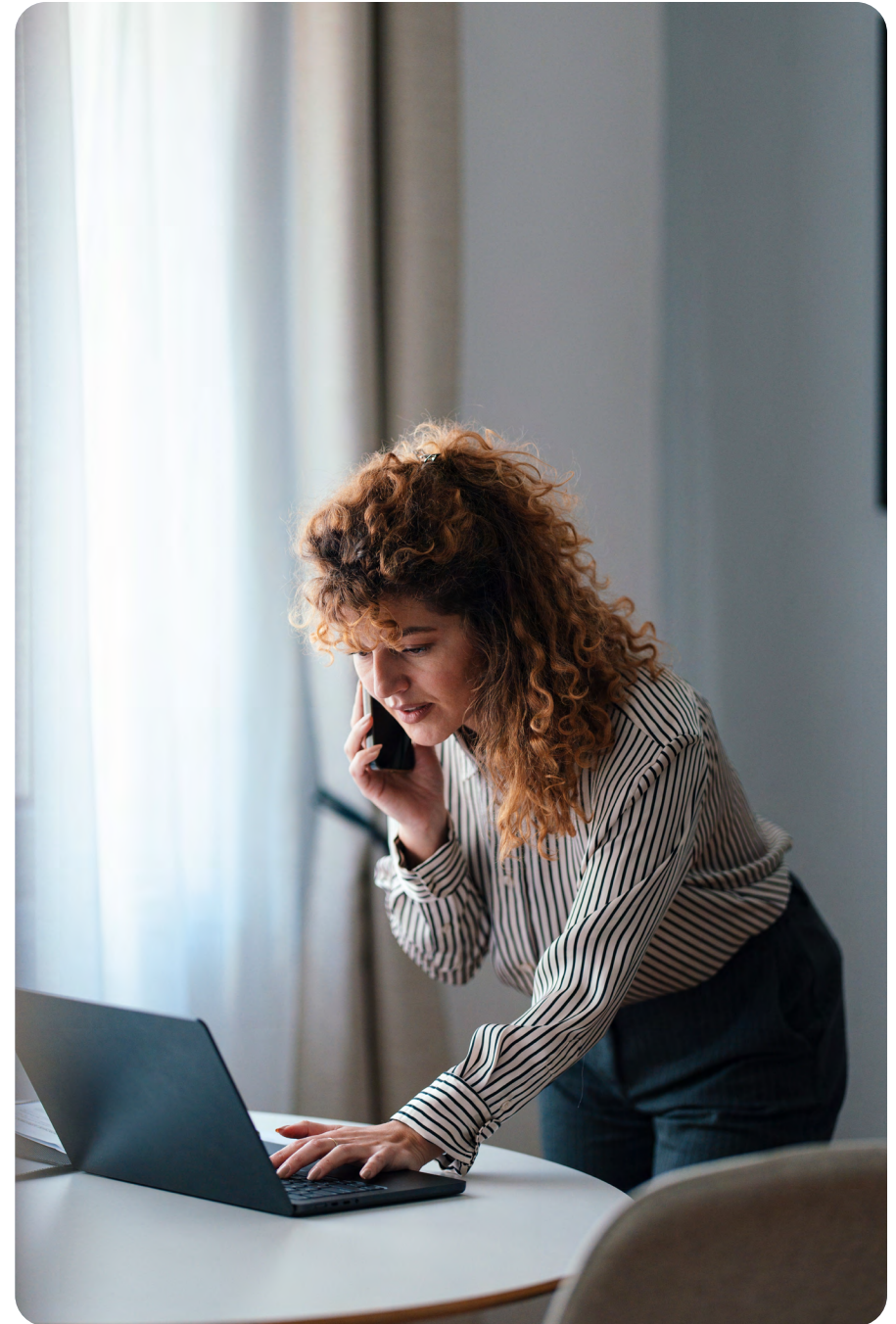
Built with scalability in mind, proprietary AMS platforms grow with your organization, offering a variety of implementation options to meet your unique association needs. They also offer robust security features, compliance support, and updates—giving you peace of mind as your association evolves.

✓ Dedicated support and innovation

Vendors behind proprietary AMS platforms typically offer specialized support and ongoing development tailored to the association sector. You'll benefit from ongoing product enhancements, expert support, and a roadmap aligned with the needs of associations.

"Proprietary AMS systems are built from the ground up by the vendor. These tend to be full-featured and have a very familiar look and feel for your staff. These systems are often more budget-friendly, if you will, but can be a bit more expensive to stay on top of upgrades. You'll want to consider your total cost of ownership with this system."

— Matt Rist, VP, Product for Associations



TYPES OF AMS SYSTEMS

All-in-one

Adopting an all-in-one AMS empowers a small-staff association to streamline operations, enhance member engagement, and drive sustainable growth, all through a single, easy-to-use platform.

Here's how:

✓ Everything in one place

An all-in-one AMS consolidates essential tools like membership management, event registration, website design, and online communities into one centralized system. Staff can access everything they need to grow revenue and empower members without juggling multiple platforms or vendors.

✓ Lighten staff workload

Automate routine tasks and free up staff time for strategic initiatives through scheduled reports, trigger-based emails and texts, automated registration confirmations, and more.

✓ Build year-round engagement

Choose an all-in-one AMS that offers a built-in mobile-responsive online community to foster deeper connections among your members. With personalized content feeds, career resources, and networking tools, you can create a welcoming environment for new members and encourage ongoing participation.

✓ Advance your mission

An all-in-one AMS helps you raise your organization's visibility with a modern, mobile-responsive website and integrated communications tools.



✓ Grow and diversify revenue

With integrated e-commerce capabilities, you can manage dues, events, sponsorships, donations, and store items in one place. Flexible membership options, like auto-renewals, installment payments, and tiered pricing, help reduce churn and attract new members.

✓ Make smarter data decisions

Analytics and dashboards provide instant insights into member behavior, engagement, and organizational health. You can offer interactive visual dashboards and scheduled reporting to keep leadership informed and aligned.

TYPES OF AMS SYSTEMS

Best of breed

When an association chooses a “best of breed” AMS approach, it means they’re opting to integrate multiple specialized solutions to meet their unique needs. An organization might choose this approach because it can select the best solution or unplug one solution and add a new one to enhance the member experience.

However, when you choose the best of breed approach you might experience the following challenges:



✓ **Member awareness and experience**

You'll need to educate members about each system they'll interact with. This can potentially lead to confusion or frustration, especially if the user experience isn't seamless. Additionally, your personalized branding might suffer if each system has a different look.

✓ **Vendor and integration management**

Working with multiple vendors means navigating different support teams, contracts, and support level agreements (SLAs). Integrations between systems can require ongoing maintenance, troubleshooting, and development. As a result, data syncing can be inconsistent and delayed.

✓ **Upgrade and release coordination**

With different systems, each will have its own upgrade schedule, leading to compatibility issues between platforms, unexpected downtime or broken integrations, or a need for frequent testing making you responsible to ensure everything still works together.

TYPES OF AMS SYSTEMS

Build your own

When an association opts to build its own AMS from scratch, the primary motivation is control: they want a system tailored precisely to their needs, workflows, and member experience.

While this approach can deliver a highly customized solution, it can also come with significant challenges. Here's why:

✓ Substantial initial investment

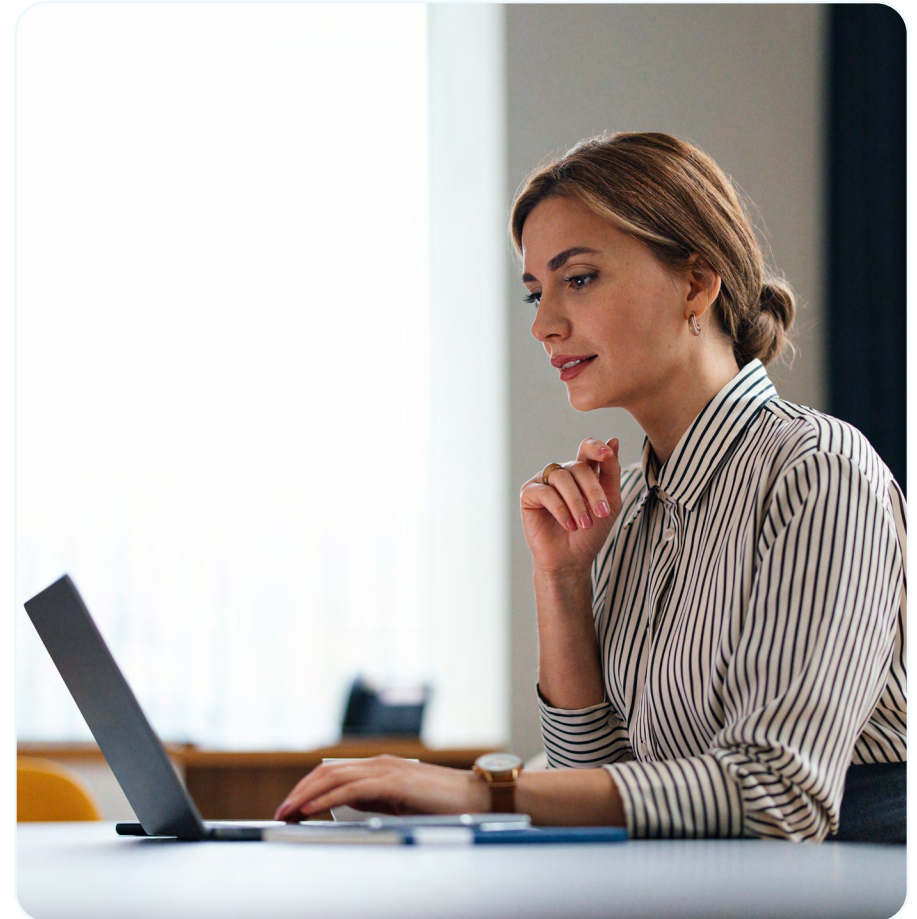
With a build your own AMS approach, you'll likely experience high upfront costs for development, infrastructure, and staffing. You can also run the risk of exceeding your budget due to scope creep or underestimated complexity.

✓ Expensive to maintain and expend

New features or integrations must be custom-built, which is costly and time-consuming. Additionally, ongoing maintenance requires a dedicated technical team to fix bugs, update security, and ensure performance.

✓ Scalability and longevity risks

As your needs or membership evolves, your custom systems may not scale with you. Additionally, if your key developers leave, you might be left with a system that's challenging to maintain or upgrade.



Want to learn more strategies in finding the best AMS fit for you? View our on-demand webinar today!

[Download now](#)

Learn more

Choosing the right association management software (AMS) is more than a technology decision, it's a strategic investment in your organization's future. With so many options available—from CRMs like Salesforce and Microsoft-based solutions, to proprietary, all-in-one, best-of-breed, or even custom-built systems—the best choice ultimately depends on your staff capacity, member needs, and long-term goals.

By carefully assessing your organization's pain points, prioritizing integration and scalability, and evaluating the level of support and security each vendor provides, you'll be well positioned to select an AMS that strengthens operations and deepens member engagement.

Technology adoption is accelerating across associations, and now is the time to ensure your systems align with your mission. With the right AMS in place, your staff gains efficiency, your members enjoy a more personalized experience, and your organization is equipped to grow sustainably for years to come.



Finding the right AMS for your organization is crucial to the future success of your association. Are you ready to discover the best AMS for your organization?

[Learn more](#)

About Momentive Software

Momentive Software (formerly Community Brands) amplifies the impact of over 30,000 purpose-driven organizations in over 30 countries. Mission-driven organizations and associations rely on the company's cloud-based software and services to solve their most critical challenges: engage the people they serve, simplify operations, and grow revenue. Built with reliability at the core and strategically focused on events, careers, fundraising, financials, and operations, our solutions suite is bound by a common purpose to serve the organizations that make our communities a better place to live.

