



WHITEPAPER

Demystify the AMS decision-making process

Discover the best association management software with tips, checklists, and comparison tools



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Introduction

Is it time to update your association management software (AMS)? Maybe your organization is experiencing some technological pain points. Perhaps you're managing your members on multiple data spreadsheets. Or maybe your association is hoping to enhance the member experience.

Whatever the reason for making the change, research backs it up. [Research](#) discovered association members who view their organization as an early adopter of technology, ultimately feel more satisfied, more connected, more likely to renew, and more likely to promote their organization.

About half of association professionals say their IT budget will increase over the next year, with 29% spending more on AMS or customer relationship management (CRM) platforms. The choice

to select a new AMS is a big decision, especially during periods of instability and budgetary scrutiny. At times, the path to finding the best technology for your organization might feel overwhelming, but it's well worth the effort.

Follow our guide for helpful resources to advance your software selection process:

- ✓ Assemble your AMS selection team
- ✓ Discover the Impact vs. Usage matrix
- ✓ Guide your software decision process with the AMS functionality template

Let's get started.



How to build an expert internal software selection committee

When it's time to determine your organization's technological requirements, you'll first need to assemble a software selection team. Follow these five steps to get started:

1. Create a diverse committee

It's important to assemble a software selection team with representatives from different staff departments (i.e., IT, membership, finance, marketing, etc.) to ensure all your employees feel included and you are considering all functionalities of your organization.

2. Identify roles and responsibilities

To ensure all committee members understand their part in the software selection process, define each members' purpose on the team by setting clear objectives.

3. Define team leaders

Select a leader from each department, so all employees feel ownership during the software selection process.

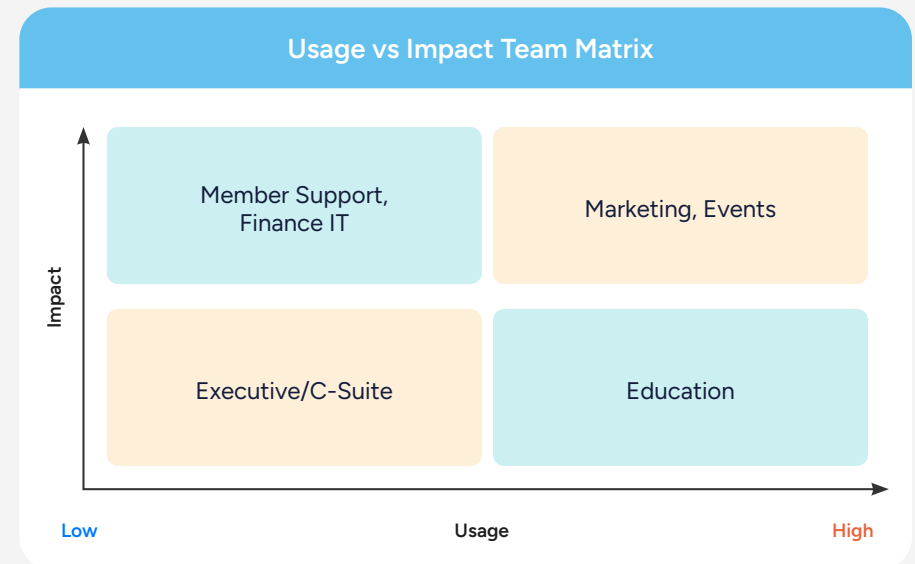
4. Establish communication channels

Ensure your technology project stays on track by identifying a backup point of contact. This can go a long way towards keeping your software selection team updated on key project developments.

5. Use an Impact vs. Usage matrix

Leverage an Impact vs. Usage grid to identify your evaluation committee and the necessary resources to implement change. For example, you could create your team based on how much they use your current technology and how much it impacts your organization.

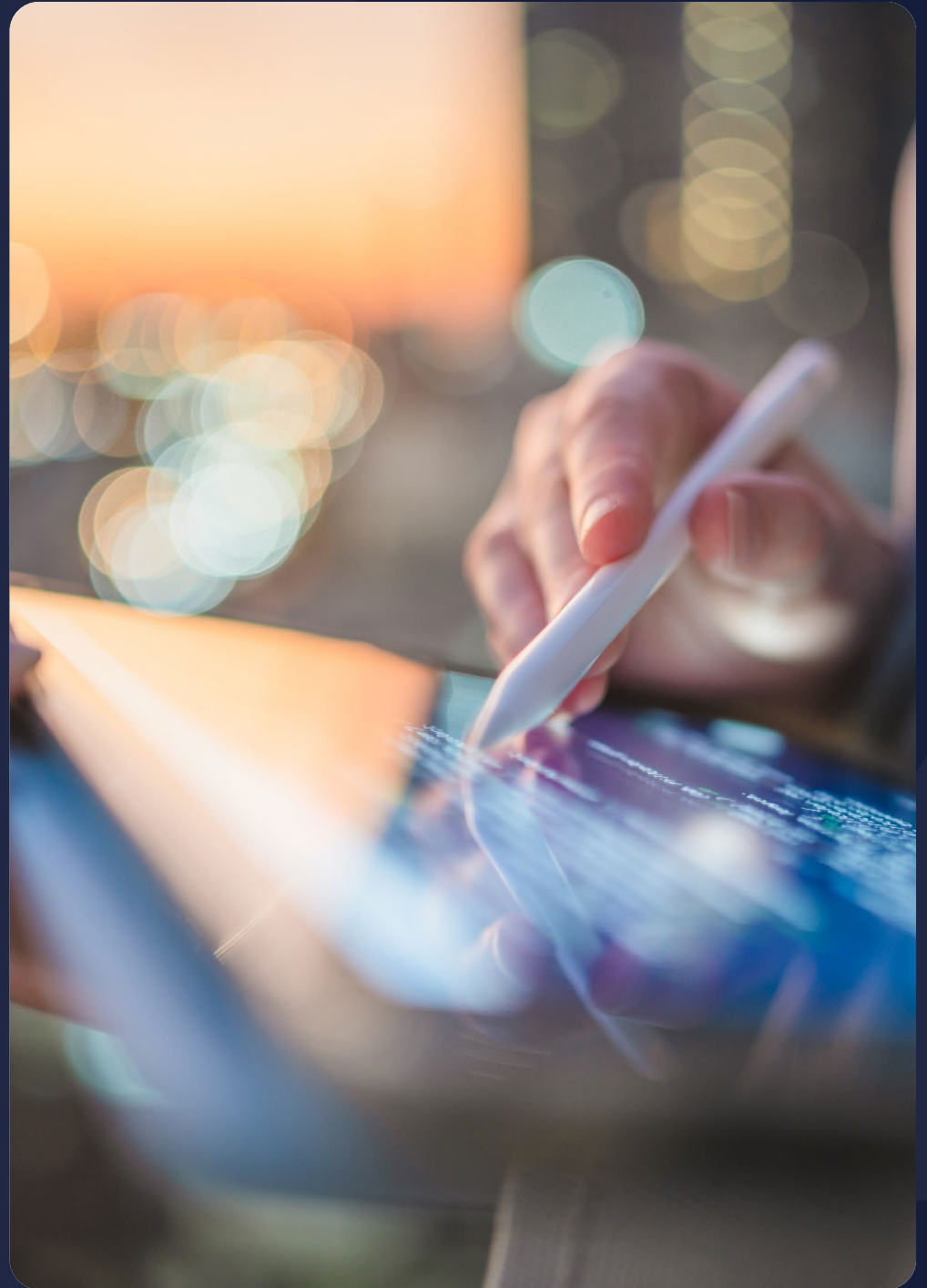
Based on these requirements, there might be an employee who frequently uses your AMS but doesn't necessarily have a large impact within your organization. Considering these factors and using an Impact vs. Usage matrix will help you build a team that's best suited to choosing new technology.



The ultimate AMS functionality template

Your AMS should empower your staff and members, not hold them back. Leverage our AMS decision-making matrix to discover the best solution for your association.

What's a decision matrix? It's a decision-making tool allowing your association to prioritize and evaluate the best technology options based on specific criteria. Using an AMS functionality template, you can evaluate the available possibilities versus your association's specific needs and determine the best software for your organization. Follow these steps to begin using a decision-making matrix:



Member engagement

When it comes to driving member engagement at your organization, you'll want to determine the current state of your membership. Doing so will help you gauge the best technology to support your engagement campaigns.

Here's what to look for in member management functionality:

✓ Recruitment

- Does the AMS offer an easy path for individuals to join your association?
- Can staff easily cultivate and track prospective members along their membership journey?
- Does the platform allow your organization to configure multi-tiered membership models, including individual and organizational memberships?

✓ Retention

- Does the platform offer auto-renewal functionality to boost retention at your organization?
- Can staff automate renewal messages to members, streamlining communication and prompting them early so they renew sooner?

✓ Member communication

- Does the AMS simplify the process of sending personalized emails to your members and prospects, allowing you to send branded emails and segment emails based on your database?
- Can you leverage SMS text messages to reach your members and prospects, reminding them about upcoming events, prompting them to renew their membership, and more?
- Can you drive continuous member engagement through your AMS online community, connecting members to your organization and inspiring an excellent member experience?
- Through your AMS member portal, can you boost member communication and empower your members to manage their own membership information?





Revenue

Does your platform offer a modern e-commerce experience? If not, it's likely time to upgrade your technology.

These important revenue features stand out in AMS functionality:

✓ Member dues

- Does your AMS make it easy for members to renew their memberships? With options like stored payments, recurring payments, scheduled payments, express payments, and more, membership renewal can become a streamlined process.
- Does your platform offer automatic credit card updates? Member credit cards frequently change—to avoid a denied card and a declined membership—choose an AMS with automatic card updates.

✓ Non-dues revenue

- Does your platform offer Apple Pay and Google Pay to appeal to younger members, drive revenue, and lower cart abandonment?
- Does your AMS make it easy for members to make donations or pledges online?
- Is your e-commerce experience secure and PCI-compliant?

Staff experience

In addition to elevating the member experience, you'll want your AMS to enhance your staff experience. So, it's important to ask—does your current platform adequately support your employees' needs?

If not, it's time to look for technology that empowers your staff. Improve the staff user experience with these important features:

✓ Automation

- Can you increase staff efficiency with your AMS by leveraging automation to streamline repetitive day-to-day tasks? Automation can help you generate and send invoices, emails, event confirmations, and more.

✓ Training

- Does your platform make it easy to onboard your employees, ensuring they understand how to leverage the AMS, feeling empowered to use the platform and meet the needs of your members?

✓ Integrations

- Does your AMS have the capability to integrate with your other software solutions, including a learning management system, career center, event management technology, data analytics, and more? With an extensive software ecosystem, you can advance new member acquisition campaigns, enhance member retention effort, boost non-dues revenue, and more.

Data analytics

Is your AMS helping your organization become data-literate? Whether a small organization or large, the right platform allows even the least tech-savvy association staff to have the visibility and transparency to bring on better outcomes for its members.

Advance your organization with powerful data by prioritizing these crucial features:

✓ **Dashboards and reporting**

- Can your association trust your data? With the right AMS, you'll have powerful analytics to help you visualize key organizational metrics and identify trends to drive positive change within your organization.
- Is your data easy to access? With the right AMS, your data should be easy to visualize with helpful reports and dashboards, ensuring you gain key insights to guide your organization. Look for an AMS that offers reporting with dynamic and filterable functionality to allow for a personalized user experience.

Product innovation

How up to date is your AMS? Using older technology slows your association down and adds difficulty to your staff's ability to manage more of what matters.

As you consider which AMS you choose for your organization, ask these important questions:

- ✓ **How often does the platform receive updates?**
- ✓ **Do the updates cost money?**
- ✓ **Do the updates cause breaks to the current version?**

Data security

Another crucial consideration when choosing technology is security. Your member records must be secure on your new platform. As you research new software vendors, you'll want to ask the following questions:

- ✓ What level of protection and recovery does your AMS vendor offer your organization?
- ✓ Does your AMS vendor have extensive servers to back up your data in the event of a privacy breach?
- ✓ Does your AMS vendor follow the best practices in data security?
- ✓ Does your AMS vendor provide an in-house Security and Compliance team?
- ✓ Does your AMS vendor provide an information and risk management program to meet data privacy regulations and expectations?

Actionable Resources

Take the insights shared in this whitepaper to the next level. To make informed decisions about association management software (AMS), leverage these three essential templates that can help streamline your software selection process.

Leverage these resources to guide you through evaluating AMS functionalities effectively:

AMS Functionality Checklist:

Help your organization decide what your software requirements are before you engage with vendors by defining and prioritizing your needs.

Download now

Momentive

Executive Summary

	Average WEIGHT	Total Team Scores	Final Total WEIGHTED Score
Member Reporting	3.5	29	101.5
Member portal login	2	35	70
Accounting	3	22	66
Renew membership dues	1.5	33	49.5

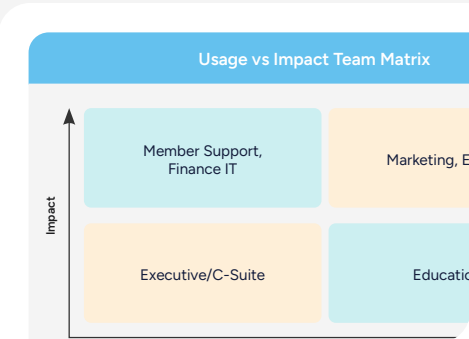
This is the final report after sorting by the Final Total Weight scores, based on largest points.

Then, enter the Final Total WEIGHT with the highest scores having the highest WEIGHT, down to 1

Impact vs. Usage Matrix:

Identify your AMS evaluation team and the necessary resources to implement change.

Download now



Vendor Comparison Matrix:

Compare potential vendors side-by-side to determine the best fit for your association.

Download now

Momentive

Executive Summary

Product A	Next Steps	Total Weighted Score	
	Pass/Submit RFP	0	copy paste relevant r

Product B

Next Steps	Total Weighted Score	
Pass/Submit RFP	Total WEIGHTED Score	copy paste relevant r

Product C

Next Steps	Total Weighted Score	
Pass/Submit RFP	0	copy paste relevant r

Product D

Next Steps	Total Weighted Score	
Pass/Submit RFP	0	copy paste relevant

Learn more

As you start your journey for new association management software, take time evaluating and considering the best technology for your organization. Assembling your internal software selection team is the first step on the path to your new platform. Next, leverage the Impact vs. Usage matrix and the AMS functionality template to be better equipped to transition toward an innovative software model that's right for you.

When you're ready to select your next AMS, go to the best in member management: Momenive Software. Our association management software solutions are designed to efficiently manage membership activities, elevate engagement, uncover data insights, and drive growth.



About Momenive Software, formerly Community Brands

Momenive 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.

Learn how Momenive can help you bring on better outcomes for your members.

[Learn more about Momenive](#)

[Find the right AMS
for your organization >](#)