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WHITEPAPER

Your guide to implementing association management software (AMS)

The association's playbook to get started with a new system





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Your ultimate guide to prepare for new association management software

Selecting and implementing new association management software is an exciting opportunity to enhance your organization's efficiency, engagement, and overall success. While the process involves multiple steps—creating a request for proposals (RFP), evaluating vendors, securing board approval, and finalizing contracts—each step brings you closer to a more powerful and streamlined system.

According to the latest Momentive Software research, association professionals say implementing new software is one of their greatest technological challenges. However, with the right resources and software, your organization can set the stage for a successful AMS implementation.

The best part? You don't have to wait until the software is in place to set your association up for success. By preparing for implementation early, you can proactively shape the transition to ensure a smooth and rewarding experience. While challenges may arise, thoughtful preparation will help you navigate them with confidence, keeping your project on track and maximizing the value of your new AMS.

Embracing the implementation phase also presents an opportunity to refine your processes, rethink priorities, and build a strong, engaged team ready to lead your organization into the future.

This guide will equip you with the tools and strategies to:

1. Keep your implementation on time and on budget
2. Build the right team and increase communication
3. Gain organizational buy-in throughout the experience
4. Understand the implementation timeline, so you have full insight into the entire process

Let's get started!

"As you prepare to implement your new AMS, it's important to focus on what you want your organization to achieve and the best practices to achieve your goals," said Jody Longshore, SVP, Professional Services. "Defining your project goals will lead to a successful AMS implementation."

Ready to learn more about planning a successful implementation? Catch our on-demand webinar!

Watch it now

How to stay on budget

New association management software (AMS) is a major investment. Managing the costs of your new AMS extends well beyond the shopping and selection stages. As you enter the implementation phase, there are several strategies you can employ to make sure the project stays within budget and in scope:

1. Be prepared for change

Successful implementation projects require time, patience, and flexibility. Rarely does the initial plan turn into a reality, as changes are often needed. It's essential to go into this process with realistic expectations. Doing so will help you tackle each phase of the project more productively.

The key to keeping your implementation within budget is to look to best practices. The more you can commit to following best practices, the more predictable and the lower your implementation costs will be.

Following best practices, though, is directly tied to being ready for change. Chances are, what you've always done in the past won't be the best way forward. After all, if you're looking to do what you've always done, can you really expect different results?

Be open to the idea of change when your implementation team suggests a best practice. This might mean that you'll need to prompt those in senior management to accept something new; other times you might have to finesse a conversation with the board about changing policies and bylaws to adopt a new process.

Here are some tips you can follow to manage change at your organization:

- ✓ Don't make decisions in a vacuum and take feedback into consideration
- ✓ Balance organizational constraints with the realities of your implementation timeline, cost, and resources
- ✓ Offer early and often hands-on exposure to your new system so staff may quickly learn the new platform
- ✓ Provide a consistent and thorough onboarding program so all employees know how to utilize your AMS

Just remember: The result will be a system that best helps you achieve your organization's goals. There may be new paths to get there, but the outcome will be better – and less costly – in the end.

"Rather than trying to automate your old processes in a new system, look for areas where your new AMS can help you improve your current workflows," said Longshore. "Take time to define your short-term requirements versus your long-term ambitions and plan how you want to accomplish your long-term goals with your new platform."

2. Clearly document your process

As you prepare for your AMS implementation, it's essential to document all relevant organizational processes thoroughly. A key aspect of this preparation is business process mapping, which visually outlines the steps involved in completing various association processes. By mapping your processes, such as membership enrollment, renewals, event registration, and learning content purchases, you gain a clear understanding of how your association operates and where improvements can be made.

Take particular care in documenting your membership processes, including the joining and renewal workflows. Detail what your annual conference looks like, from planning to event registration, and how your current software supports these activities. Business process mapping can help you identify inefficiencies, redundancies, or gaps in these workflows, allowing you to refine them before transitioning to a new AMS.

Coming to your AMS vendor discovery sessions with clearly outlined business process maps will set your team up for success. Having these maps ready will not only help you communicate your association's operational needs but also enable your AMS vendor to demonstrate how their system can optimize and enhance your workflows. When discussing key business processes, an AMS vendor can use your process maps to propose solutions tailored to your organization's specific needs.

As you attend AMS discovery sessions, approach them with an open mind. Rather than focusing solely on replicating your current system's step-by-step process, concentrate on the end goals of each business function. Your new AMS may offer opportunities to streamline and improve your workflows based on industry best practices. Leveraging your business process maps, your organization can better visualize these enhancements and align new AMS capabilities with your strategic goals.

Map out your association's processes by following these steps:

1. **Identify your process**

Clearly define the scope of the process you want to map. Establish what you hope to achieve and set boundaries to keep the mapping focused.

2. **Gather details**

Process mapping should provide clarity and insight into how tasks are completed. Observe each step in detail and document the key actions involved.

3. **Engage stakeholders**

To gain a comprehensive understanding of your processes, consult staff members, stakeholders, and even members who interact with the workflows.

4. **Create a visual of your process map**

Using the gathered details, construct a visual representation of your process, keeping everything as straightforward as possible to ensure clarity.

5. **Conduct a process review**

With your process mapped, conduct a thorough review to identify inefficiencies and opportunities for improvement. Use your process maps to evaluate whether your current workflows align with your association's goals.

3. Work in phases

Most enterprise associations have complex needs, so when you set out to gather your requirements, the list can get very long, very quickly. The best way to tackle this while keeping costs down is to work in phases. For instance, plan to implement half of the requirements in the first phase and the remainder of the requirements in phase two.

Organizations that decide to implement in phases typically find that once they go live after phase one and get comfortable with working in their new AMS, their total requirements are actually reduced. This doesn't necessarily mean that everything will be taken care of in phase one, but you may see your list of original requirements start to shrink after go-live.

Working in phases relates back to being prepared for change. Organizations that are open to change will find that, with phase one fully implemented, new ways of doing things might eliminate the need for additional configurations that were originally planned.

Here are three more benefits of working in phases:

- ✓ After phase one, you and your team will be familiar with the system, and you'll likely find that it's easier to move forward in a system that's already up and running.
- ✓ Releasing incremental functionality after you are live will save more time and money than if you converted everything at once.
- ✓ You'll be able to stop paying maintenance fees to your outgoing vendor once you turn your new system on. A phased implementation will have you doing that much sooner.

4. Avoid scope creep

We've all been there. It's halfway through a construction project and, while everything is ripped up and exposed, why not add another bathroom or redo the floors?

The same goes for an AMS implementation. You might have been detailed in your requirements gathering, but once you get into the implementation, those seemingly "little" requests and add-ons start appearing.

Managing scope creep is one of the best ways to stay within budget. And the bulk of this management should take place from the beginning. Spending time up front to stay on track, versus veering off on new things toward the middle or end of the project, will save a considerable amount of time and money.

To that end, talk with your vendor's implementation team about exactly what you want and need. Here's why:

- ✓ These discussions tend to reveal deeper requirements.
- ✓ The implementation team can bring to light the needs and best practices of similar clients.
- ✓ The team might be able to suggest a requirement you'll need for processes that will save you time and dollars in the future.

How to establish the right team

Assembling a strong team for your AMS implementation will put your organization on a path to success and growth. The first step is to find the right people – those who understand (or will at least listen to) your concerns and who share your goal of getting things right. The implementation team consists of both your staff and vendor reps.

Here's what the team looks like:

1. The internal team

When assembling your internal team, look for a broad representation from your organization, preferably at least one or two people from each department. Input from across the organization is essential, because each team and department have different needs, processes, and problems to be addressed.

Your internal team should include the following:

1. Executive sponsor

The executive sponsor offers support, direction, and guidance to team members at all levels of the organization. This includes assisting with the change management strategy and rolling communication out to the greater organization. This person is the ultimate cheerleader for the project, advocating for continued support and commitment from within, as well as resolving any escalated issues.

2. Project manager

Your internal project manager will work with the project manager on the vendor side to monitor and control budget, schedule, scope, and quality. This role is responsible for addressing resourcing issues and removing obstacles from the overall project, as well as ensuring key milestones are completed.

3. Subject Matter Experts

Your Subject Matter Experts are tasked with providing business process input in the early stages. They also author key documentation, provide data and functionality validation, and are key to making sure staff are properly onboarded in preparation for go-live.



How to choose an internal team lead

The internal team needs a leader who will be the “final say” when the team can’t come to 100% agreement on issues. The team lead should:

1. Be familiar with processes

Because the AMS will be used across the organization, the team lead must have some understanding of the processes, procedures, challenges, and best practices of all departments that will be using the software.

2. Have authority

Even if the person has the know-how, the team won’t think they have the final say unless they have a position of authority. It’s wise to choose someone who others will listen to and follow.

3. Be knowledgeable

It’s important that your team lead understand three vital elements: 1) the technology behind the software (to be able to identify and understand best practices and solutions), 2) the organization’s business processes (to track the metrics the business side needs), and 3) the people (to facilitate buy-in, communicate go-live details, and set up onboarding).

4. Be dedicated

Finally, the process of implementing an AMS is lengthy. You need someone to head it up who has dedication to the issue so that they won’t give in to fatigue or boredom, or simply toss up their hands if the going gets tough.



2. The vendor team

When evaluating AMS providers, consider their experience level with implementations, especially ones that will be like yours. Generally, if the providers have that experience, they're able to deliver faster and provide more realistic estimates.

Also, you can expect the vendor to probe you with questions about your processes, procedures, customers, data, and much more. You need to feel comfortable enough to trust them. If you don't, they won't be able to help you get the most out of your software.

Exercise caution when dealing with AMS vendors that don't implement the software themselves or have control over the underlying platform. If they don't do the implementation, then sometimes it's difficult to determine which party should be held accountable if there are support or system issues. It's good to set those guidelines and expectations from the beginning.

1. **Executive sponsor**

The vendor's executive sponsor is there to provide support and remove hurdles from the overall progress. This role is the vendor's counterpart to your internal executive sponsor.

2. **Project manager**

This role operates much the same as the internal project manager does – monitoring and controlling the budget, schedule, scope, and quality. Additionally, this person should listen to your changing needs and make adjustments as necessary.

3. **Solution architect**

This role leads the early stages of implementation, identifying the design and approach for the project and promoting industry best practices.

4. **Business analyst**

This position examines and documents your business processes and requirements while acting as a liaison between the internal and vendor teams.

5. **Lead technical consultant**

This role builds the technical design document based on specifications from the solutions architect and the business analyst. This person creates the effort estimates for work products and has overall responsibility for design, development, and deployment activities.

How to maintain organizational buy-in

Some people think of change in a positive light: It comes along with the promise of a new beginning and a fresh start. But, change can also be hard.

Change management fosters acceptance for your new association management software and gets employees used to new work processes. It happens successfully when the fundamental need for change is realized, and that realization is then used as motivational drive to continue with the change. It also involves continual encouragement and support.

Here are some helpful tips to maintain organizational buy-in for your new AMS:

1. Set expectations

No matter the number of demos, the length of your RFP, or the completeness of the functional requirement documents your Subject Matter Experts compile with your consulting team, something will always come up. That doesn't mean everyone failed at project management, it's just the reality of having multiple people involved.

While it's impossible to expect the unexpected, you and your staff should be prepared for a degree of flexibility in the process. Things come up, changes are made, and people get nervous. It's best to face concerns head on and set the expectation that not everything will happen exactly as planned.

2. Be willing to identify and address doubts

When implementing any new software, you can always expect to meet some resistance from team members. It's completely normal. Over time, people get set in their ways, and when the time comes to change, there is that hesitation of disrupting their job.

Instead of disregarding staff concerns, actively listen to them. Show them the ROI and how your new AMS will streamline processes, specifically ones that impact their roles. Show, don't tell. Sometimes all it takes is an actual demonstration of how much the AMS will improve a staff job to open their minds to the idea.

3. Present the software to the users

Vendor presentations are usually reserved for the software selection committee and perhaps a few high-level execs who need to sign off on the expenses. But, it's a good idea for the selected vendor to also present the software to everyone.

This does several things: It shows your staff that you are transparent. It explains to them how the new AMS will affect their daily work processes. And, it answers a lot of their questions, alleviating fears and gaining support for the new software.

Also, during the implementation, keep the team updated on what's happening. The more employees are involved, the more comfortable they'll feel asking questions, and hopefully in time, that will alleviate fears and give them a sense of optimism.

4. Present the software to the users

During the software implementation process, it's important for all parties to clearly articulate their needs and ask as many questions as necessary. As you go, if something comes up that doesn't feel quite right or if something needs to be added, bring it to light immediately and empower your employees to ask questions. It's better to voice your concerns as soon as they arise than wait until the eleventh hour or, worse yet, not voice them at all.

5. Celebrate wins

It's important to take time to celebrate milestones during your implementation, whether they're big or small. Incremental milestones are important in a long-term project, when that end goal can seem far away. Maybe you and your staff don't have the budget for blow-out parties at each step along the way, but some pizza, candy, or a late afternoon toast at the end of each implementation phase can go a long way toward easing everyone's stress levels and keeping the focus on small victories.

Along these same lines, determine internally which employees are the best to lead the change with positivity. Having key staff leaders be "change champions" can generate buy-in from those who are struggling with the work and the changes.

Consider updating your employees' job descriptions during the implementation year, including key implementation tasks. That way, it's overwhelmingly clear that a successful go-live is everyone's responsibility and should be at the forefront of everyone's minds.

6. Keep the goal in mind

There's a reason you're making a software change and, most likely, that reason is because you're moving toward something better. If it starts to feel overwhelming, help your team focus on where you'll be after the project is completed. Highlight your new AMS and how it will support and empower your organization and your members.

7. Maintain the skillset

To do things the "new and improved" way, consider training that will allow you to do your job better, work more confidently, and onboard other teammates who can follow the new processes and procedures.

Everyone in the new system is going to be doing something that helps run your organization. If staff members know how to use the system properly, then they can execute their job better. And you will realize a greater ROI when staff use the AMS the way it was intended.



Understanding the implementation process

So, you've budgeted correctly, your team is in place, and you have an entire staff energized about the new system and ready to celebrate. What's next? The actual implementation. This is where the rubber meets the road and the work begins.

Here are phases of implementation that you can expect to happen over the next several months:

- Onboarding
- Discovery
- Implementation
- Launch

Let's take a closer look at each phase.

1. Onboarding

Depending on the size and complexity of your project, your association will work with a team of experienced professionals to help you align resources between the internal team and the vendor team. The vendor team will work to transfer your organization's information provided during the sale process, including your RFP, digital assets, and additional discussions and presentations.

During onboarding, your team will attend training classes to introduce your association to your new platform. Training will help your staff feel confident in using your AMS by launch time.

2. Discovery

Before you can begin leveraging your AMS, it's essential that you identify the functional requirements needed. If these requirements are not known prior to implementation, then your organization will begin at the discovery phase.

Next, you'll work with the vendor team to gather information about your current business processes, develop solution-design documentation, participate in data-conversion planning, and determine technical needs specifications. You'll deliberate with your Subject Matter Experts, attend meetings, clearly define the scope, and provide timely feedback regarding all the documents produced. Your feedback on the solution-design document will help the developing team better meet your requirements so they can configure a system that meets your needs.

During this phase, you'll also be working on an implementation plan. Your vendor will work with your team to determine how to best proceed with the design project, preparing you to begin the next phase of implementation.

Here's a quick breakdown of the high-level tasks to be completed in this phase:

1. **Determine if your business processes align with the standard software solution.**
2. **Consider how the new platform can be extended to meet your organization's needs.**
3. **Plan for the data-conversion process and identify which records will be included in data migration.**
4. **The vendor team will work to design your software solution to best meet your association's needs. If necessary, the team with design extended configurations.**
5. **Work with vendor team to review and approve a full roadmap of extended software requirements.**

3. Implementation

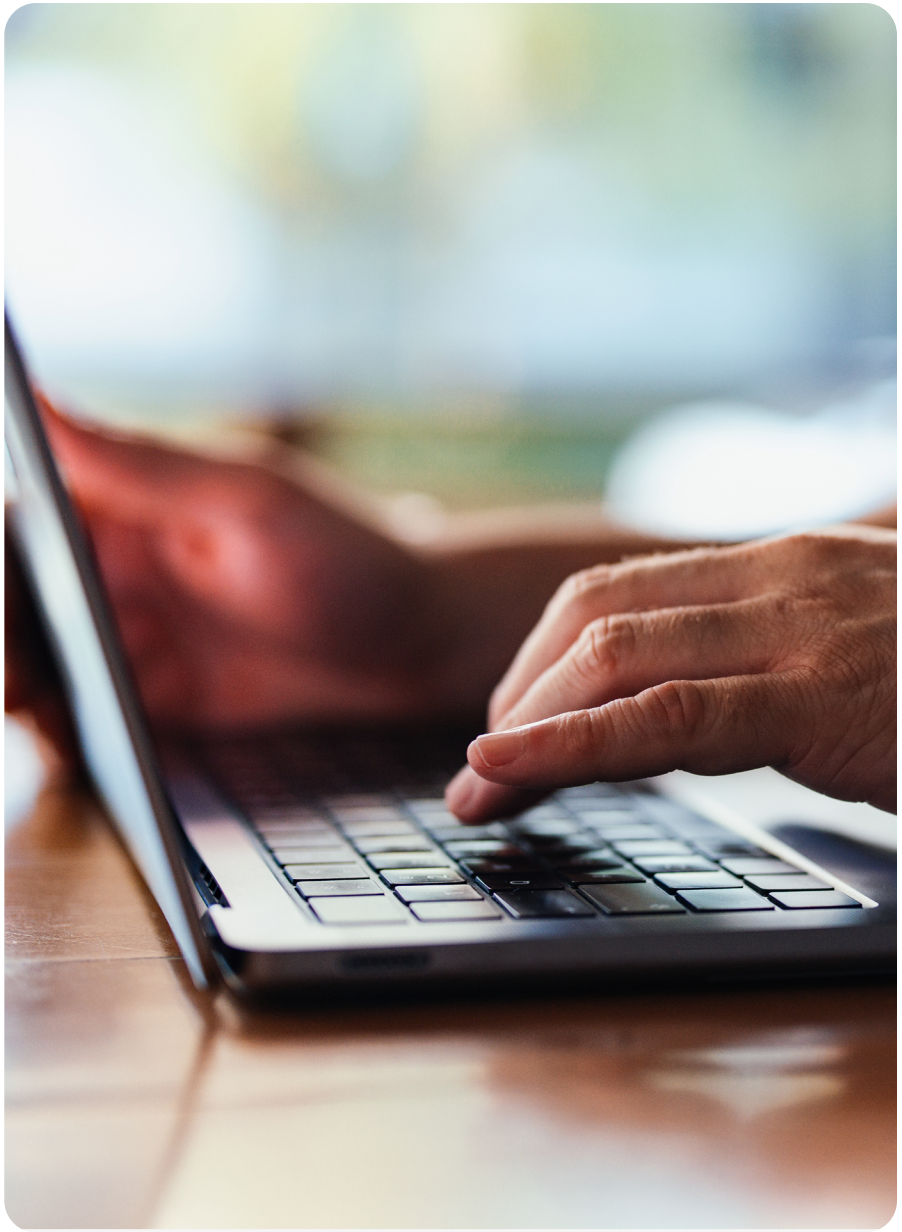
During this phase your vendor team will work to complete all extended configurations and integrations you agreed upon in the previous phases. The development team will test and demonstrate the system configurations. Your AMS team should leverage quality assurance testing and user acceptance testing to ensure a successful transition to the new system. During this phase, your vendor team will also conduct data conversion to support training, testing, and ultimately the system launch.

The overall goal for this phase is to produce high-quality deliverables that match the exact specifications laid out in the design phase. It's essential for your Subject Matter Experts and technical team to be engaged in this phase, reviewing developed application functionality and soliciting feedback.

4. Launch

The final phase is a culmination of months of hard work, strategy, and creativity. During your launch, the vendor team will complete final tasks and wrap up loose ends. This phase involves end-user training to upskill each user on your system's unique extensions. On the launch day, your vendor team will provide support for your staff to ensure a smooth transition.

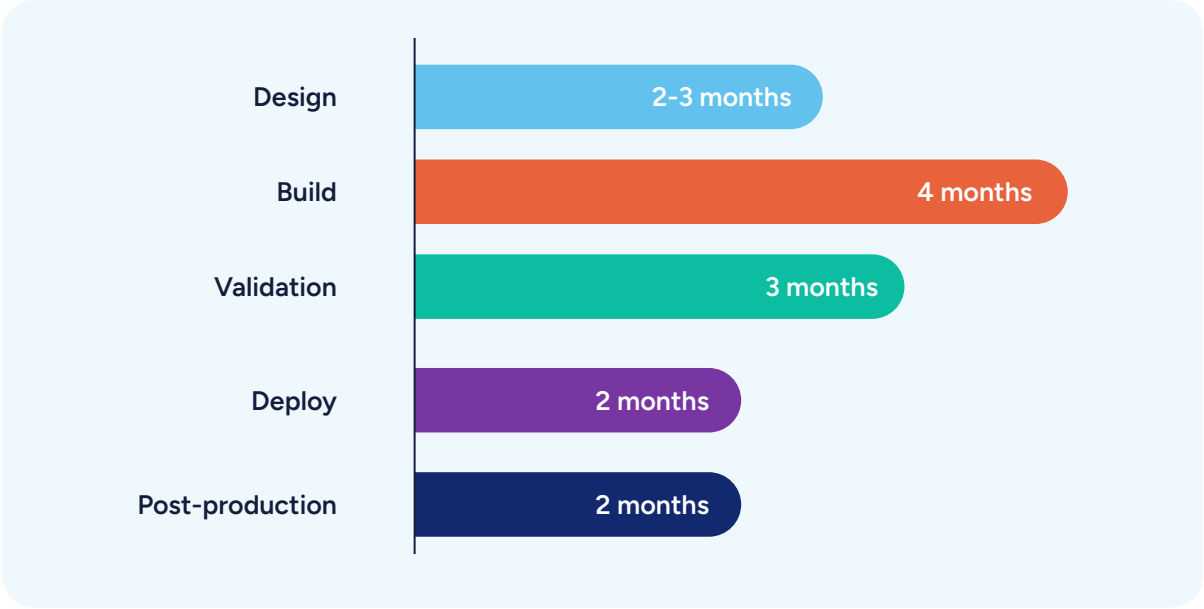
Following the launch, your vendor will seek your feedback and determine if any adjustments are needed based on real-life usage. If relevant to your organization, you can also prepare plans for future project phases.



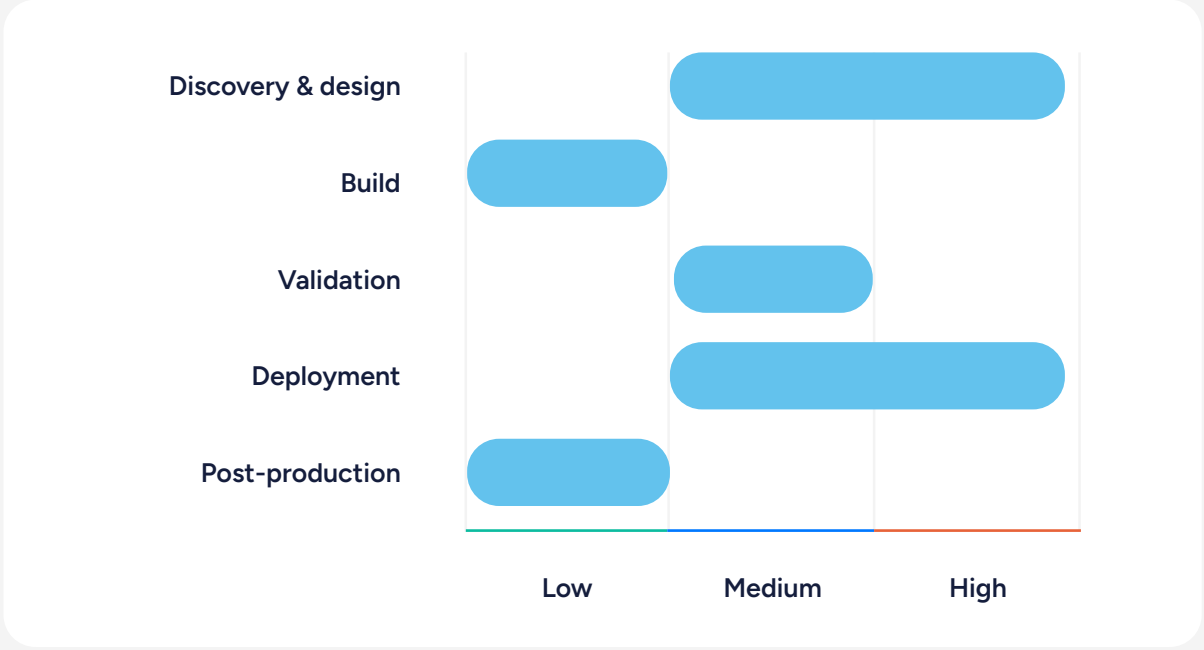
What to expect: time commitment

Every organization is different. Your specific schedule will be largely determined by the amount of data you'll be converting, and the functional requirements produced in the initial phase. Implementation projects average about 11 to 12 months, but can last more than two years, depending on requirements.

Each phase requires a different level of commitment from your team. Here's a quick breakdown of the typical amount of time you can expect to dedicate during each phase of the project:



Greater commitment is often needed during the initial and final phases. Throughout the project, expect your team to have the following commitment levels:



Getting ready: data conversion

Typically, the most time-consuming task in an implementation project is the process of data conversion. It's also crucial to the success of your implementation.

To cut down on expenses, some organizations are tempted to tackle data conversion in-house, but this is a risky move. Even the most expert in-house IT department won't have experience with the new system like your software vendor. After all, the vendor team is made up of experts in the new system and can (and will) save time, frustration, and money in the long run when you turn the data migration process over to them.

That said, your IT team will be heavily involved. They're the experts in your current system and know the data intimately, so they absolutely need to be active in the process. But the ultimate responsibility for ensuring data conversion happens successfully should fall to the vendor team working the implementation.

Duplicate records or inconsistent data can cause issues during the conversion process. How can your organization eliminate these data issues? Practice good data hygiene. Here's how:

1. **Routinely audit your data to look for inconsistencies and confirm your records are complete and correct.**
2. **Establish a data cleansing plan and execute the necessary steps to assure your data remains accurate after the system is up and running.**
3. **Empower your employees to be data stewards. Train staff in the importance of maintaining accurate records and educate all employees on how to update and maintain data.**

"Building a faster system on top of legacy functionality will only amplify its existing flaws," said Adam Carey, VP, Implementation Services.

"The same applies to your organization's data. Scattered across multiple locations, your data is often unstructured, decentralized, and unable to deliver the right insights to the right people when they need them. Implementing a new system isn't just an upgrade — it's a chance to refine and optimize your data, transforming it into a powerful asset that drives your organization's mission forward."



The data conversion process

Data conversion starts as early as the sales process, where you'll start talking about how to prepare for your data migration. You'll identify the data sources that you will need to convert to the new system, including data from existing systems, spreadsheets, and any other systems of record.

Then data is mapped into the new system. This happens through a number of small iterations, where little bits of data are moved into the new system. During this time, it's wise to get users involved so they can start seeing the data in the new system and start testing it. This process helps to maintain user buy-in and gives staff the opportunity to keep the teams updated if something is missing or if everything's migrating over correctly.

Once it's working, the next data set is pulled over. This occurs throughout the implementation, and the process can vary from running data conversion a dozen times to running it almost weekly over the course of a year. The data conversion process runs from start to finish. An organization will run data conversion one final time during go-live to ensure all data is up to date before the new software fully launches.

The data you'll be converting often falls into three categories:

1. **Types and codes: Includes values in drop-downs and various codes in the system.**
2. **Master data: Data such as people, companies, and employees that exists only once in the system; transactions are used repeatedly.**
3. **Transactional data: Data describing business activity, such as orders and subscriptions.**

"Not all data is good data, and not all data should be migrated," said Carey. Every system has its own architecture, and legacy systems accumulate entropy over time. Instead of treating data as an infinite mass to transfer, view it as a collection of actionable, valuable assets that drive success. Before migrating, ask yourself: What truly needs to be moved? Where does it live? Is your team ready?

And most importantly—can you justify why it should be migrated at all?"



The end of the beginning

Even after the implementation phase is over, your team should continue the close relationship it's built with your vendor. Ask questions and seek solutions from support staff when needed.

Once you've reached the final stage, take some time to celebrate. Your team has worked hard to ensure the process goes smoothly. Now that the implementation process is over, you can start enjoying the rewards of your new system, managing your organization from an intuitive, efficient platform, and focusing less on the system itself and more on serving your members.



Momentive

About Momentive Software, formerly Community Brands

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.

Learn more

The tips and best practices in this guide come from the knowledgeable team at Momentive Software. Learn how to successfully navigate your AMS implementation by speaking with an expert today.

Learn more

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