



Technology Buyer's Guide

Membership Management Software Solutions for Associations

Abstract

Choosing a suitable membership management software product that not only meets your needs, but also improves efficiencies and reduces your organisational workloads, is a big task. It requires patience and attention to detail to ensure the end result provides measurable improvements both now and well into the future. This guide has been compiled to assist with the process of selecting a software solution that will meet your requirements and—more importantly—a vendor who can add value to your organisation in a wide variety of areas by offering advice and guidance on features that will significantly improve your organisations workflow and business processes.

Table of Contents

Form a Project Team.....	3
Appoint an Internal Project Manager	3
Start Collating Requirements.....	4
Should you hire an external consultant?	4
Identifying Business Requirements.....	5
Vendor Short-Listing	6
To RFP or to not RFP?	6
Choosing a Software Environment	8
Fully-Automated, Semi-Automated or Manual Processes.....	9
Vendor Stability.....	9
Does the vendor offer updates?	10
Legacy Software & Integration Issues & Costs.....	10
Budget vs Expectations	11
Capital Expenditure or Finance over Term	12
Costings.....	12
Vendor Software Demonstrations	13
Proposal	13
Choosing Your Vendor	14
Current Ongoing Projects.....	14
Recently Deployed Projects	15
Taking the Leap!.....	15
In Summary	16

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Form a Project Team

Before purchasing any software or system, you first need to form a team to research and evaluate products in the marketplace. The key players in your team should include:

- CEO/COO or Senior Management Member
- IT Manager
- Finance Manager
- Marketing Manager
- Events Manager
- Other business unit managers and volunteers

Once the team is established, distinct goals and timeframes need to be set, and team members need to be regularly updated. If the project starts to fall behind or lose direction, this needs to be addressed straight away to avoid increased costs and extended timeframes.

Appoint an Internal Project Manager

Everyone within the organisation may be busy performing their own tasks, but one person is needed who has the skills to not only pull all the information together, but to narrow down what is actually required, and what would simply be ‘nice to have’, as a list will need to be compiled with features, requirements and possibly a request for proposal (RFP). This is your project manager

A project manager is responsible for driving the project and ensuring all objectives are met and the project remains on track. Who is the most organised person in your business, with great communication skills and the confidence to ask the tough questions? They need to have a handle on all sections of the organisation to ensure the software meets the individual requirements and expectations of all stakeholders.

With this in mind, the key qualities to look for in a project manager include:

- Good communication skills at all levels
- Respect from and for staff members and management alike
- An excellent understanding of the current and future needs of the organisation
- A working knowledge of all areas of the business
- Proven organisational skills

One of the major risks in appointing a staff member for this role can be the *focus*. They still have their own job to perform and if anything is going to lag, it will be the project, as the staff member will naturally gravitate toward the familiar territory—what they know best. This can have a negative impact on the overall project, causing time slippage and increased implementation costs. The ideal candidate for this role, then, would be someone familiar with project management, and the organisation should be willing to provide flexibility and support for the staff member’s usual role.

Start Collating Requirements

For a software implementation to be effective, you need staff 'buy in'. If your staff do not see the benefits of using a new system, the task of deployment will be very difficult. Talk to staff members and ask them what they desire, require, and would find most useful if the choice was up to them. You will find the staff members beginning to take ownership and it will become the topic of conversation around the office, which in turn promotes interesting new ideas.

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One staff member should be responsible for collating this information. Using a score card is a good way of forming a 'wish list' based on specific questions. The score card may contain a list of fixed questions, and a free field for comments and additional requests. When compiling your score card, ensure that you cover the basic requirements for each business unit, while keeping them high-level as you do not need too much information at this point. More information can be added later when the project team is established.

Should you hire an external consultant?

The decision to utilise the services of an external consultant really depends on two main factors: *money and time!*

"A consultant can take care of the whole process, or just parts of it, dependent on your desires and requirements."

An experienced consultant could save you thousands as they will usually have enough knowledge of the products in the market to save you valuable time spent short-listing the most suitable vendor. The downside of a consultant is that they will first need to understand your business, including the processes, staff members, and current environment (which can take a little time). Having said this, it can also be of great value, as the consultant may often gather information from staff members that you may not have, as staff members could find it easier

talking with and opening up to an external person.

A consultant can take care of the whole process, or just parts of it, dependent on your desires and requirements. As an outsider, they can provide an unbiased view of your organisation and spot inefficiencies in current work practices, before providing solutions as part of their recommendations.

Identifying Business Requirements

When deciding on what your business requires, you must think outside the box, outside of what you already know; move past the “But that’s how we have always done it” and instead ask, “What if we...?” You will be pleasantly surprised by what systems can provide in terms of automation—the efficient completion of many repetitive tasks—saving time and sanity! If your organisation has a membership manual currently and you think it will have to stay that way as your membership model is just too confusing, think again! There are existing systems that can completely automate memberships, from gathering the initial information, choosing the membership to suit them, and prorated billing and live online transactions—and that is just the tip of the iceberg! ‘Events’ is always an interesting one, as people seem to think their events are unique to the organisation, but in most cases they are not, and certain systems have very advanced events modules that can not only allow members to buy at special rates, but also sell a set number of tickets, offer catering options, function room options, and produce a badge and attendee list for the actual event. The saying “You only know what you know” is undeniably relevant to Member Management systems, as most organisations only know what they currently use or have heard about. However, if they are willing to step outside their comfort zone and outside the box, they are more likely to make an informative product choice, which will increase efficiencies while reducing time spent on repetitive tasks; improved outcomes for all involved!

"Push the boundaries and think creatively, as this is the critical point in deciding the best system for your organisation."

Now it is time to form a plan, or a ‘Needs Analysis’ document, and the main task for the Project Manager or consultant at this point is to push the boundaries and think creatively, as this is the critical point in deciding the best system for your organisation. There are two main lists you will need to begin with:

- ‘Must Haves’ - the processes and features critical to your business
- ‘Nice to Haves’ – a wish list of features that improve the user’s job and offer additional benefits, such as additional member benefits or time-saving.

The main tasks you need to deploy to achieve the above include:

- Stakeholder/Management meetings
- Surveys, both internal and member
- Interviews with staff
- Focus/working groups broken down into departments
- Collaborative document for all team members to comment on

Vendor Short-Listing

The process of choosing a vendor may seem daunting but if you put the right processes in place, you will quickly identify your 'Must Haves'. A good place to start is at the most basic, general level, searching online for an initial list of providers. Some of the most popular search terms include:

- Membership management software
- Association software
- Cloud-based membership software
- AMS
- Member management systems

Utilising the internet will allow you to quickly find a list of 4-6 providers that appear to offer different solutions, which may either meet, fall short of, or surpass your list of 'Must Haves'. Keep your 'Must Have' list handy as you search the vendors' websites and tick off each requirement. Also keep your 'Nice to Haves' list close by, as you may find some of these features match the standard features

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advertised on the vendors' websites. Bear in mind that in most cases, the companies you are looking for offer a solution tailored to your organisation needs and they speak with people just like you on an everyday basis, so don't hesitate to contact the company and ask questions or enquire about information not available on their website. You may well find they offer more than what first meets the eye, or perhaps you missed certain details while navigating through their site such as are they an Australian company that has staff

employed here that can offer local support? Using a product that is based overseas can add some roadblocks like local support, GST implications and lack of real time support due to time differences.

To RFP or to not RFP?

That is the question. The simple answer is: 'Have you gathered enough information in order to pass a request for proposal document to potential vendors, which they will fully understand and be able to respond to?'

The reply will most likely be 'no', and the main reason for this is that you may still have more questions than answers; if this is the case, you either need to conduct further research or speak with two or more vendors to collect further information, organise a demo, and then a proposal. An RFP is quite personal and may not always allow a vendor to ask questions or highlight certain areas that you may not have thought of. Many organisations tend to choose something between the two—a high-level list of questions and 'Must Haves', as

"An RFP is quite personal and may not always allow a vendor to ask questions or highlight certain areas that you may not have thought of."

well as contacting vendors to learn more and develop a relationship. This relationship is important. Aligning with your provider will make the process so much easier.

If you do decide to move forward with an RFP, make sure to structure it correctly and include the following, at the very least:

Overview

A summary of your business, the reason for the RFP, background information on current software and business systems in use at your organisation, detail about any specific workflow or unusual factors that may need to be addressed. You will also need to provide information on the size of the organisation, location of offices/branches, member and staff numbers, as well as details of the team, Project Manager, contact details, etc.

"Stick to the core information required and keep the RFP the same across all vendors."

Requirements

Your requirements are a crucial part of the RFP and for this reason you must ensure you ask all the questions that need answers. Consider how the vendor will address the questions and ensure they are clearly defined. Stick to the core information required and keep the RFP the same across all vendors. That way it is much easier to compare 'like for like' results.

Clear instructions

When submitting your RFP, clearly indicate the timeframe for the RFP, which should be considerate of the complexity of the document and features required. Normal timeframes for submissions are between four and six weeks. Bear in mind you need to offer a clear line of communication, too, which will be the first point of contact within your organisation, a team member who can answer all questions relating to the RFP. You can state that all questions from vendors must be submitted by a certain date, and that all submitted questions will be compiled and emailed out to the vendors on a specified date. This creates a level playing field and provides all vendors with the opportunity to answer any additional questions that may have been submitted during the process.

Timeframes

Provide at the very least a guideline in your RFP regarding your timeframes and your requirements. These can include:

- RFP deadline
- Demos
- Review RFPs
- Vendor selection date
- Project implementation and go-live date

Be realistic and reasonable with your timeframes so vendors can work around them, but unreasonable deadlines will only start the relationship off on the wrong foot!

Choosing a Software Environment

You need to ensure that whatever vendor you choose can provide the security and reliability that your organisation demands; this includes ensuring the system you choose is up-to-date and scalable down the track, which will save you time and money in the future. Choosing the environment for your software can be a sticking point for some organisations as they hold rigid to storing all their data internally and the main reason for this seems to be a lack of understanding of what the 'cloud' actually is.

The 'Cloud' is just another term for 'Internet'. Storing data in the cloud is actually very secure. Just think of all the banks across the world today storing data; they have come to rely on this as their only form of storage in many cases, and as such their security online has become big business. Storing data offline has traditionally been favoured as it is accessible ("I know where my data is") but think about it this way instead— if you had a choice of storing all your data in a secure environment, with multiple backups in different locations, backup power, and five star security, would you still choose your office as the safest place?

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Holding data in-house is fast becoming a thing of the past and, based on cost alone, it is now very expensive, as the cost of servers and maintenance of same can be very high; that's not to mention the inconvenience of upgrading every few years to ensure you provide a fast solution for your staff and customers.

Choices are out there. SaaS (Software as a Service) is growing in popularity daily, with most progressive companies now choosing to build web-based software over traditional 'desktop' installs. Cost and flexibility are the main considerations when choosing which type of software to adopt, but don't forget to also consider current installations, legacy systems, longevity and the life cycle overall.

Fully-Automated, Semi-Automated or Manual Processes

Every system offers a slightly different set of features and workflows, and the challenge for you is to find the one that best suits your business (without trying to reinvent the wheel!) Some systems allow the automation of certain tasks, like newsletters—but remember to ask the questions, as you could be caught out here, for while some systems allow you to send E-newsletters, they might not offer:

- Dynamic lists – there is no point sending to the same list every time, and they should be automatically updated
- Fully-content-managed newsletters and a variety of templates to choose from
- Simple filtering for specific list generation—does it allow you to filter out by member type/what event they have attended/their age/member type/location, including many other fields of filterable data
- Tracking and reporting

This is just one example of what to check for in terms of automation (or lack thereof). The less the system automates, the more resources you will need to employ to manage the system, and the more room for error.

"Remember: ask to be shown how certain processes work, don't just accept their word for it!"

Another key area that should be automated as much as possible is membership, as this can be very time consuming, and we all know that renewing memberships can raise many questions. The whole process of signing up a new member or renewing an existing member should be automated, and that includes data capture and recording and membership types, through to payment processing and confirmation of membership. The system should report on all new and renewing members and present updated information on the member manager's dashboard, just as the marketing manager wants to see the results of the newsletter that was sent out. Automating as many

tasks as possible is key to providing value to members and allows staff to focus on other tasks that can generate, increase and interact with members. So remember: ask to be shown how certain processes work, don't just accept their word for it!

Vendor Stability

Who are you dealing with? Are they stable? How long have they been in the business? What infrastructure do they have in place? These are just some of the points you will want covered. Fortunately, most companies will be able to offer you a corporate profile document that covers all these topics and more, and should provide you with all the information you require, including:

- Size of the company – number of staff
- How long they have been in business

- Number of clients serviced
- Follow-up support packages offered
- Any standard contracts for services on offer
- Services offered either as 'fixed price' or open-ended
- Does the contract/proposal cover all features offered and required for a fixed price?
- Whether or not the vendor offers/allows backups of the software
- Whether or not the vendor offers provision of source code or placement of the source code in Escrow

Does the vendor offer updates?

No doubt we have all had a frustrating experience dealing with out-of-date software at some point, which is why you need to ensure the software you use is current, is utilising the latest secure and reliable technology, and that as updates are

performed you are including them. The reason for this is that if your system has any bugs, fixes can rolled out to you, and as updates and improvements become available, you receive them, and you are always using the latest version of the software. If updates are not provided as part of the agreement, ask whether they are

available and at what cost. You may also want to check on the period of warranty on offer as some providers will only provide warranty for a limited period and this could add costs and risk down the track.

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Legacy Software & Integration Issues & Costs

Like most organisations you may have existing software, such as database or newsletter systems, which you think need to be integrated into the new software... STOP. The question you need to ask yourself is, "Can I export the data from my existing systems and import it into the new system?" If the answer is 'No', or 'We can look at that later for you!', or worse still, 'You can just keep using your existing systems alongside the new system!', start to worry, because if you are going to go to the trouble of implementing a new solution for your organisation, then you want this solution to be exactly that—a *solution*. This means it should replace other software. If it doesn't, you will end up with multiple databases and disparate data, which means you will still have to double or triple enter data, and that defeats the whole purpose!

You want an 'all-in-one' solution with a centralised database that allows all data entered to be used across the entire system. Keeping your MYOB or QuickBooks or other financial system separate is sensible, but all member data, including full history or transactions, newsletters, events attended, products purchased, CPD points attained, etc., is vital, as you can cross reference any information in the one system, which allows you to track all data seamlessly, and makes marketing and reporting a breeze.

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Budget vs Expectations

While budget is a primary driver of the actual deliverables, you should not be too concerned initially, as long as you have a realistic budget based on the 'Must Haves', which is the most important factor. If you are expecting to furnish all your 'Must Haves' as well as you 'Nice to Haves' with a restrictive budget, then you need to rethink your strategy. Pricing for member management software varies

greatly because the solutions also vary in what they deliver.

And bear in mind that there are quite a few systems on the market that are stock-standard, which means you will have to take what you are given (which does not suit most organisations).

"Understand the difference between 'Must Haves' and 'Nice to Haves' and draw a clean line in the sand."

If you are a small organisation and do not employ staff, then you may find the basic 'off-the-shelf' solution offers enough features for you, and most of these usually have small set-up costs and ongoing monthly fees at a low rate.

If your organisation employs staff and has departments, then this type of solution will not improve your organisations, workflows, or processes. You need a solution that can be tailored to better fit your needs. Just because a solution is tailored to fit your needs doesn't mean it will have an expensive price tag, either. It is all about compromise.

Understand the difference between 'Must Haves' and 'Nice to Haves' and draw a clean line in the sand. Prioritise your 'Must Haves' and work through it with the vendor. You will find that some things are standard and others can be provided with a small amount of customisation. Compile a graph of the 'Nice to Haves' and next to each, list the following to ascertain the business impact for each feature, add a score to each and based on the score, implement the high frequency, high impact, low cost options first and work through the first in line with your budget:

Example graph of 'nice to haves'

Feature/Risk	Frequency	Impact	Cost	Benefit	Order of Implementation
Server outage	4/10	9/10	2/10	Less downtime	1
Customised reports	3/10	3/10	0/10	Automated task, reduce time	1
Email integration	9/10	5/10	0/10	All member data in 1 place	1
Online payments	5/10	5/10	0/10	Reduce time and improve member benefits	1
Webinars	2/10	2/10	3/10	Increase audience	2
Conference management	3/10	4/10	6/10	Improve efficiencies	3
Multiple data entry	9/10	9/10	0/10	Increased efficiency	1

Capital Expenditure or Finance over Term

Controlling the financial impact of implementing a new system can be tricky. Do you use capital funds? What are the payment milestones? How are payments linked to deliverables and can I finance the solution?

Most vendors require an initial payment prior to beginning work on your project and the first stage is scoping or consulting on your needs and workflows. Typically the time spent on this stage is the most time consuming, but it is also the most important, for if it is not carried out correctly, it will impact the rest of the project. Expect at least 25-35% of the total cost to be allocated to this phase of the project. Stage payments at each milestone are quite normal and this can be broken down into 3 or 4 total payments over the project. Ask the vendor to assist with spreading the payments out over the project if they don't already offer this.

"Ask the vendor to assist with spreading the payments out over the project if they don't already offer this."

Finance for software is extremely hard to source and there are very few providers in the market that have the ability to offer finance via a third party. If they do, it is worth consideration, as it enables your organisation to spread the cost over 24, 36 or even 48 months, which greatly reduces the financial impact on the organisation and may even allow the deployment of additional custom features, as the cost is spread over a fixed term. The usual requirements for finance obviously need to be met and these may include credit checks, length of time on business, whether your association is incorporated and perhaps even financials for the last few years. Finance is a very popular choice as it allows you to fund the project through operational expenditure rather than capital expenditure, and that in itself has advantages for some organisations.

Costings

This can be the most important factor in choosing a package that fits your organisation needs as you need to understand exactly *what* you are getting for your investment. Ask for a fixed price proposal with all the features required listed, so that you can ensure you are not going to be surprised by last minute additions or extras.

You will also need to understand what ongoing costs are involved and what is covered. For example, if you use technical support, are you billed for it or is it included; if so, how much is included. Are backups, data allowance, email blasts, etc., included? Ensure you understand the complete picture as far as ongoing costs are concerned. It is also worth asking about what is *not* included and, with that, what additional options are available, just so you are aware of what you are not getting for your money (things like additional training, travel costs, and even 'add-on' packages).

"It is also worth asking about what is not included and what additional options are available and at what cost"

Vendor Software Demonstrations

You are about to see the actual system that may be implemented into your organisation, so make sure it addresses as many of your requirements as possible, ensuring that:

- You can hear the presenter and see the demonstration clearly
- The presentation is clear and the software easy on the eye
- The login process is simple and intuitive
- The dashboard is clean and easy to navigate, and can it be customised for each user
- The dashboard keeps a recent history of tasks and actions
- All prompts from the system are easy to identify and act upon
- 1 click-navigation is provided for most functions of the CRM and website
- You can ask to see a specific part of the system; this ensures that 'smoke and mirror' tactics are not being used to only show you the parts of the system that work

"You should be able to ask the questions and request further information at anytime"

The initial demonstration should involve the project team and include all stakeholders but the Project Manager should be the primary voice during the demo and the other team members should have their questions written down, ready to ask when appropriate. Remember, this should be a live demonstration and you should be able

to ask the questions and request further information at anytime, stopping when further clarification is required on a particular feature.

Proposal

A critical part of the process is a well-presented, professional and comprehensive proposal that covers all discussions to-date and includes all required features. Some proposals are too basic and lack detail. It is far better to have too much detail than not enough, so you can make an educated decision based on the facts as they are presented in the proposal. Check all costings match your expectations, including the ongoing support, hosting, licensing fees, etc. Do you require any additional services that are not included in the proposal? Ask for a revised version if there is something missing or you need clarification on some points.

"Check all costings match your expectations, including the ongoing support, hosting, licensing fees, etc."

If there are options available that have been discussed make sure that these are included within the proposal and that pricing is clearly displayed so that you can weigh up a variety of options dependent on cost, timeframes and the impact and benefit to your organisation both initially and into the future.

Choosing Your Vendor

Now that you have gone to the trouble of researching the systems and narrowing down a shortlist of potential vendors, it's a good idea to ask for references. Any reputable vendor will gladly provide you with some reference sites, but you need to be able to talk to some of their customers to get feedback on their experience, not only throughout the implementation process but also the testing, go-live processes and ongoing support once live. Other factors you should consider at this point include:

- Does the vendor have any other products or services that they offer which could be useful to you in the future such as marketing, strategies, LMS, etc?
- Is data import included within the price and does the vendor assist you in this process?
- Does the vendor have a 'technology roadmap', as this shows commitment to the ongoing development of the product in the future?
- Who owns the data in the system? This is critical to ensure that the data remains your property at all times and can be exported easily if required.
- What percentage of the company's efforts are deployed into this product? Is it a large part of their business?
- Is the company actively involved in the NFP sector and supporting your sector?
- Do you feel that you have built a good relationship with all the vendor's staff members who you have interacted with to-date?
- Is there a software warranty and if so, what is included within the terms of the warranty and how long does the warranty last?

Current Ongoing Projects

The saying, "You are only as good as your last project" is indeed true, so when looking for references, you should request an interim reference from a current customer who is going through the process of developing a solution with a vendor you are considering right now. Obviously you want references from customers that are using the system, but it is vital that you speak to a client that is going through the process now to see whether they are impressed with the company, product, service and timeframes to date.

"You should request an interim reference from a current customer who is going through the process right now"

Once a project has been live for a few months, it is very easy to forget any issues that you had during the project development phases and this is an ideal time to learn about your potential vendor and their processes: do they work? Are they simple to understand? Most importantly, are all timeframes being met and are issues being mutually resolved? You would also do well to ask if there have been any other issues that they were not expecting, such as lack of detail, rushed consulting process, or even back-flips on certain features that were quoted and documented in the initial proposal.

Recently Deployed Projects

Asking for a list of projects that are live is useful for several reasons. If there is a website attached to the solution, you gain an insight into the creative skills of the vendor and you are also likely to be able to interact with the website, to a certain degree, without becoming a member. If you are a

"Test a few registration forms on other sites and check to see whether the forms validate data such as telephone numbers and email addresses!"

marketing person, you will also be able to see if the website is focused around member value and retention: does it contain the required 'Calls to Action' to engage members and prospective members alike? The UX (user experience) must be as simple and intuitive as possible and this should be obvious to see from the website design/layout.

You will find most vendors offer a 'Portfolio' page on their website, which is a great starting point. Ignore the fact that they may not appear to have

worked with organisations in a similar field to yours, as this is not important if the vendor is focused on Associations, as this shows that they understand the unique requirements of your sector. One handy hint is to 'play' with a few of the systems that the vendors have built and see if they have thought about workflows and business processes and user journeys not to mention 'field validation'! Field validation is so important as there is absolutely no point in collecting data that is incorrect as bad data in only leads to bad user experience. Test a few registration forms on other sites and check to see whether the forms validate data such as telephone numbers and email addresses!

Taking the Leap!

O.K., it's decision time. You have the budget approved, the board's approval, and now you just need a start date. If you haven't already, ask about start dates and timeframes for each stage of the project and lock in a main start date.

Once you have signed off your chosen proposal, the vendor will start the ball rolling and should begin organising the first steps.

"Request the vendor team members speak your language and not in 'tech' mumbo jumbo"

This is where the hard work really starts for the Project Manager, as they will need to ensure the project is delivered on time and within budget. To assure these objectives are met, they should:

- Wherever possible avoid 'scope creep' as this is the most common reason for project blowouts both from a time and cost perspective
- Document, document, document! Ensure all discussions are fully documented and that a project plan/specification document is used throughout the project
- Ask questions! Sometimes technology can be confusing, so make sure you ask the questions whenever you are unsure. Request the vendor team members speak your language and not in 'tech' mumbo jumbo

- Communicate to management any issues that may arise and address them quickly to avoid confusion for either side
- Be the liaison between all involved parties to avoid external pressures and requests
- Assist with data migration, training and testing of the product to ensure it meets your initial requirements and delivers to your expectations
- Be prepared, ask your vendor what they need from you and when. Data for example is a primary example of where timeframes can blow out as most companies charge for data migration and will insist that you provide them with 'clean' data and it can take a long time to cleanse your database so allow time.

In Summary

You should now have made your decision on a solution that meets and even exceeds your requirements. This solution should:

- Greatly improve member value proposition by delivering increased functionality and improved targeting of member communications
- Improve your customer service as your staff now have more time to focus on members and attend to their inquiries/needs
- Automate many of the previous manual and repetitive tasks such as membership renewals, events registrations and e-newsletters, just to mention a few
- Cut operating costs and reduce staff turnover and workloads through the provision of a system that all staff can easily utilise and reap rewards from
- Provide additional income streams through improved member engagement
- Provide quality reporting on a wide variety of data ranges at the touch of a button
- Keep room for error to an absolute minimum thanks to a seamless fully integrated database that is always up-to-date
- Be backed up by your vendor who is offering support, especially in the first few months while you 'bed in' the new system and iron out any bugs, as there are always a few!
- Offer the ability to 'scale' up as your needs change so ensure the solution is flexible enough to cater for this as it will greatly reduce future costs.

Good Luck!

The outcome of your hard work and dedication will reap rewards in the short, medium and long term for your organisation!

Multiple data entry will soon be a thing of the past.

If you have any questions or would like assistance with your membership software needs please call the author of this report, Mick Clarke from Aspedia on 0415 481 690. This guide has been produced exclusively for AuSAE member.

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