Member Management Software Evaluation Guide:

Considerations for Associations and Chambers of Commerce

Reviewing Member Management Solutions

Let's say you've reached the limit of what you can accomplish with off-the-shelf software and want to review purpose-built solutions for member management. Or maybe you have an integrated system that's lagging in functionality. If you are an association, you may be reviewing AMS (Association Management Systems) whereas chambers typically look for chamber management software (CMS). Whether you are an association or a chamber, selecting a software vendor can be a confusing and time-consuming effort. This document highlights and explains several important decision criteria to help narrow choices and assist in uncovering the best match for your organization.

Installation and Setup

There are two major ways in which software is delivered. The traditional method is to run an installation program on each PC and have it reside locally. The current method is Software as a Service (SaaS) or cloud computing where you simply login to a website and start using the software solution and tools.

With over 72% of businesses running or piloting a cloud service[1], it's quickly becoming the standard delivery platform for applications and services. Because the service is in the cloud[2], your organization avoids the headache of operating a mini-data center and installing regular feature and security updates.

A total web-based solution is usually preferred for associations and chambers as there typically isn't an IT staff to install and configure traditional software. SaaS allows users to access the software anywhere they have an internet connection using either Windows or

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[1] Of the 527 business and technology executives that IBM surveyed in this study, almost three-fourths indicated their companies had piloted, adopted or substantially implemented cloud in their organizations -- and 90 percent expect to have done so in three years. While only 13 percent have substantially implemented cloud, this number is expected to grow to 41 percent in three years. http://seekingalpha.com/article/889941-cloud-computing-technology-investment-strategy-ibm-microsoft-intel-oracle-amazon

[2] Wikipedia definition: Cloud computing is the use of computing resources (hardware and software) that are delivered as a service over a network (typically the Internet). The name comes from the use of a cloud-shaped symbol as an abstraction for the complex infrastructure it contains in system diagrams. Cloud computing entrusts remote services with a user's data, software and computation.

iOS. Moving your organization to the cloud will save valuable time, give all your staff easier access and save on per-seat licensing fees.

Of course even with a SaaS model, you will still need to integrate your existing data into the new system. The data integration process is an area where there may be significant differences among vendors. Make sure you ask to see an example of a comprehensive project plan with specific milestones, deadlines and clearly assigned roles and responsibilities. Ideally your data integration project lead or manager should always raise the bar by looking for ways to add further value to your data as they integrate and repurpose it into your new system.

Licensing Model and ROI

Software is traditionally licensed by the installation, the user, the features or version, the overall capacity, or a variety of factors. Software can't be fully valued if the license model restricts the number of users. Since associations have staff levels that fluctuate, make sure you understand the long-term cost implications of paying for each licensed user.

Ask your vendor for an ROI analysis. If they claim their solution will save your organization time, try to get that quantified. Do they have a plan for how you could offset your monthly or annual software payments with modules or services for non-dues revenue?

New Releases / Updates

Most traditional software companies provide one or two updates a year that you need to install on each PC. You may need to purchase these updates or pay for software maintenance that entitles you to these updates.

A SaaS company typically updates your software automatically every 1-2 months so you are able to take advantage of new features immediately and more frequently. As these updates are installed for you, there is no action on your part other than to login as you normally do.

Software that is continually updated with new features will provide more value and provide a path for your staff to grow and add to their skills as features are expanded. Ask your vendor how they rollout new features to customers. Do they have a solid communication process so major updates won't take you by surprise?

Open Access to Data

When considering a SaaS company, care must be made as to where the data will reside, who owns the data, and how you get access to it.

Make sure as part of your agreement with the provider that your association owns the data, that you have an easy process to export it, and that they cannot use your data without your explicit permission.

Disaster Recovery

If your office caught fire, was flooded, or hit by another natural disaster would you be prepared? If your software is installed on local PCs you may be without your membership data and potentially a website for weeks. In the wake of tropical storm Sandy, this is a very real concern.

With a cloud service vendor you are up and running as soon as you find a laptop and an internet connection. Do ask where their data centers are located and have them explain their disaster recovery processes.

Ease-of-Use

Software with thousands of features and benefits isn't useful if too difficult to find and use. In fact, recent studies show that most people only use a very small percentage of the software they purchase. This isn't a problem with over-buying, but rather software with a non-intuitive or outdated interface.

Anyone on your staff should be able to use core pieces of functionality without hours of training. Adding a new member or updating an address should be simple and painless.

Sit down with your staff and have the vendor walk your team through a 30-45 minute in-depth demonstration. Pay special attention to the navigation, naming conventions of menu items and general flow of the software. Make sure the vendor lists all the training and support options as well. After the demo, your staff can give you valuable feedback on how they would rate the software and how quickly they will be able to learn and put the new tool to use.

Contracts

When you select a vendor they typically will ask for a one, two, or even three year contract. Technology changes fast, especially in the software world. A company with a great product now may be behind the curve and not serving your needs in two or three years.

Select a vendor with favorable contract terms that you can get out of if they aren't meeting your needs. Ideally no contract would be required.

Training

No matter how easy a software platform is, there invariably will be some users that may need additional training on more advanced features. The strongest software partner will provide training via online videos, help files, instructor lead training and have an on-site training program. The much of the training should be included in the price of the software so that it's easy for staff to get necessary information whenever they need it.

Customer Service

When problems arise you are going to want immediate, hassle-free assistance. With the rise of companies that only provide support via a web-portal or email or outsourced call center, find out if the support you expect is what you will actually get. Everyone talks about having great support and service but you will need to ask tough questions to learn what's really there.

Verify the support options and costs are consistent with your expectations. Would you like to be able to get someone on the phone easily? Do they have current testimonials or references regarding their customer service? Are they tracking customer service metrics such as hold times? Are they using industry standard rating systems to measure their customer satisfaction?

Search Engine Optimization

A great way to serve your members is to drive traffic to them. Your business/membership directory can contain a wealth of information, such as descriptions of products and services, store hours, directions, special deals, photographs, and much more. This content can allow your organization to have the best guide for potential customers. However the traffic to your site and to your members

won't be maximized if your vendor doesn't have modules that are search-engine friendly, or optimized for all the major search engines (SEO). Google alone makes over 500 updates per year on search algorithms, so a search-savvy partner is a must.

Have potential vendors explain how they are going to maximize your traffic through search engine optimization and ask about their results.

Mobile Application Platform

There is a significant consumer trend around accessing the Internet using a mobile device. Recent studies indicate more people will access the internet from their mobile device instead of their PC sometime in 2013. This is up significantly from the prior year. To keep your members at the forefront you will need tools and technology that allow people to easily find your members on mobile devices.

Ensure your vendor has a mobile platform and a clear path forward in this new and growing area.

Partnerships

The more value you can provide to your members the easier it becomes to grow and maintain your membership base. The ideal partner will not just solve your day-to-day data management issues but will be looking for opportunities to partner with others to bring your members other benefits.

Check into who your vendor partners with and if they seem to be an "open" company that will bring in new opportunities or if they are more "closed" and focused only on data management. Do they have a list of top-tier 3rd party relationships? Integration with leading 3rd parties allows you to leverage the domain expertise of the 3rd party (such as Constant Contact for communications or VoterVoice for legislative issue engagement).

Commitment to Your Association or Chamber

Is your potential vendor involved in supporting your industry and a good corporate citizen, or are they a company focused only on their short-term growth and profit? Ideally your vendor partners will be interested in your long term success and are actively engaged in the industry.

Ask your vendor how they support and create a better environment for your chamber of commerce or association.

ABOUT MICRONET

MicroNet, Inc. is a developer of software and networking services based in Nisswa, MN. Over 1400 chambers and associations trust ChamberMaster and MemberZone from MicroNet with their member management, member marketing and website needs. Our SaaS is built from the ground up to be the most comprehensive and easy-to-use member management system, helping organizations save time through streamlining processes and automating routine tasks. With 14 modules spanning Billing, Communication, Social Media, Reporting, Mobile and more – you'll have all the tools you need to run your organization smoothly. Importantly, the organization has a highly ranked customer service and support center dedicated to your success. Visit www.micronetonline.com for more information.