

# BUYER'S WORKBOOK

**How to Choose the Right  
Association Management Software**



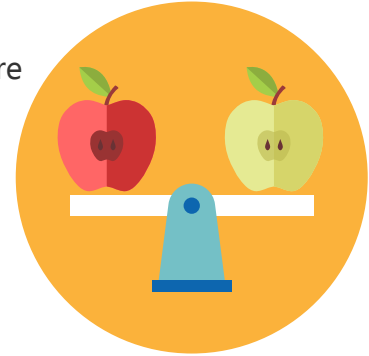
**GrowthZone**  
smarter association software

## How to Choose the Right Membership Management Software

### Introduction

This Buyer's Workbook is designed to help associations make an "apples to apples" comparison of association management software systems so they can make an informed purchasing decision for their association.

Here are the questions to ask prospective providers, presented as a handy checklist.



### Vendor Selection

There are several membership management system vendors to choose from. However, each solution on the market is unique. It's important to research your options, costs, and deliverables to determine which solution is best for your association's specific needs.

- Ask around. Get referrals and input from other associations like yours. Ask what system they use, what they like, and what features are lacking.
- Research whether the vendor is in good standing with the Better Business Bureau.
- Find out how long the company has been in the business of providing membership management solutions to associations.
- Verify how many times the product has been updated in the last 12 months (monthly is ideal).
- Ask how many customers the vendor currently serves (free trial users shouldn't be counted as customers).
- Ask about contract terms.
- Narrow down your selection to 3-4 vendors to further research.

## How to Choose the Right Membership Management Software

### Features/Functionality

Creating a list of what you need vs. what you'd like to have helps to determine which system will best meet your requirements.

- Complete the following needs analysis and review it with your vendor prospects:

	Need	Nice to Have
<b>Billing/Financial</b>		
Recurring billing and payment options	<input type="checkbox"/>	<input type="checkbox"/>
Integrated payment processing	<input type="checkbox"/>	<input type="checkbox"/>
Invoices and statements with cover letters	<input type="checkbox"/>	<input type="checkbox"/>
Electronic invoicing	<input type="checkbox"/>	<input type="checkbox"/>
Member income reporting	<input type="checkbox"/>	<input type="checkbox"/>
3rd-party financial reporting	<input type="checkbox"/>	<input type="checkbox"/>
Options to automatically drop expired members	<input type="checkbox"/>	<input type="checkbox"/>
<b>Member Recruitment</b>		
Monetize and track sales opportunities	<input type="checkbox"/>	<input type="checkbox"/>
<b>Websites</b>		
New website	<input type="checkbox"/>	<input type="checkbox"/>
Responsive website for mobile viewing	<input type="checkbox"/>	<input type="checkbox"/>
Website content management	<input type="checkbox"/>	<input type="checkbox"/>
Blog post creation	<input type="checkbox"/>	<input type="checkbox"/>
Form builder	<input type="checkbox"/>	<input type="checkbox"/>
Integration with member database and calendars	<input type="checkbox"/>	<input type="checkbox"/>
Online advertising for non-dues revenue generation	<input type="checkbox"/>	<input type="checkbox"/>
Online store	<input type="checkbox"/>	<input type="checkbox"/>
Online membership application	<input type="checkbox"/>	<input type="checkbox"/>
<b>Reporting</b>		
Standard and custom reports	<input type="checkbox"/>	<input type="checkbox"/>
Real-time information updates	<input type="checkbox"/>	<input type="checkbox"/>

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	Need	Nice to Have
<b>Events</b>		
Event management	<input type="checkbox"/>	<input type="checkbox"/>
Event sponsor management	<input type="checkbox"/>	<input type="checkbox"/>
Email invitations	<input type="checkbox"/>	<input type="checkbox"/>
Event registration	<input type="checkbox"/>	<input type="checkbox"/>
Online payments	<input type="checkbox"/>	<input type="checkbox"/>
Online calendars	<input type="checkbox"/>	<input type="checkbox"/>
Event expo management	<input type="checkbox"/>	<input type="checkbox"/>
Event sessions/breakouts	<input type="checkbox"/>	<input type="checkbox"/>
Member vs non-member pricing	<input type="checkbox"/>	<input type="checkbox"/>
<b>Communications</b>		
Write, schedule, send, track emails	<input type="checkbox"/>	<input type="checkbox"/>
Marketing Automation – set up email workflows with a variety of options/steps	<input type="checkbox"/>	<input type="checkbox"/>
Phone call, note, and email logs	<input type="checkbox"/>	<input type="checkbox"/>
Integrates with third-party marketing tools (MailChimp and Constant Contact)		
<b>Member Information Center</b>		
Member access to update their membership information	<input type="checkbox"/>	<input type="checkbox"/>
Member-to-member discounts and networking	<input type="checkbox"/>	<input type="checkbox"/>
Online bill pay	<input type="checkbox"/>	<input type="checkbox"/>
Jobs posting/viewing	<input type="checkbox"/>	<input type="checkbox"/>
Online forum	<input type="checkbox"/>	<input type="checkbox"/>
<b>Access</b>		
Customizable access levels for members and staff	<input type="checkbox"/>	<input type="checkbox"/>

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	Need	Nice to Have
<b>Membership Data Management</b>		
Manage individuals and organizations	<input type="checkbox"/>	<input type="checkbox"/>
Chapter-level categorization	<input type="checkbox"/>	<input type="checkbox"/>
Continuing education certification tracking	<input type="checkbox"/>	<input type="checkbox"/>
Detection of duplicate records	<input type="checkbox"/>	<input type="checkbox"/>
List/committee/group management	<input type="checkbox"/>	<input type="checkbox"/>
<b>Mobile Apps</b>		
Free mobile app for your members	<input type="checkbox"/>	<input type="checkbox"/>
Free mobile app for your staff	<input type="checkbox"/>	<input type="checkbox"/>
<b>Productivity</b>		
Project management	<input type="checkbox"/>	<input type="checkbox"/>
Form builder	<input type="checkbox"/>	<input type="checkbox"/>

### Ease of Use

A membership management system will only provide value if its features are easy to use and your information is easy to access.

- Ask for a product demonstration to help you determine how quickly you'll be able to get up and running with the new system. Then see if you walk away with a good feeling about whether the relationship will work.
- Find out what kind of training is available and the cost (e.g. webinars, on-site training options, videos, searchable FAQs, forums, etc.).
- Ask how frequently system updates are released, how they are communicated to users, and how they are implemented (i.e. automatically or by the users).



## How to Choose the Right Membership Management Software

### Setup & Integration

While some associations are large enough to employ an IT team, most are not.

- Find out if the system integrates with your existing:
  - Database
  - Accounting software
  - Website
  - Outlook or other email programs
- Verify that someone is assigned to support you through the entire transition process.
- Ask how long it typically takes before an association of your size can be up and running with the new system.

### Training & Support

You'll want good training and support options when you're learning the new system and on an ongoing basis.

- Verify if there is a limit to or additional cost for support.
- Find out if support is provided by in-house account representatives or outsourced to a third-party call center.
- Ask about typical customer support response times, hours of availability, and communication options (i.e. online chat, phone, email, online FAQs, etc.).



### Access to Data

It's critical for modern-day associations to have their membership management system accessible wherever or whenever they're working.

- Determine if the system is cloud-based allowing for on-the-go access with automatic feature and security updates (versus software that needs to be installed directly on each PC in your association office).
- Ask how many user licenses are included.
- Verify who owns the data and how you can access it.
- Make sure your new solutions comes with a mobile app for your staff.



## How to Choose the Right Membership Management Software

### Costs

A written cost proposal is a must.

- Get a solid understanding of all costs, including:
  - What is included or not included
  - Terms of the contract
  - Initial setup cost
  - Training and support
  - Per-user charge
  - Per-member surcharge
  - Per-transaction charge (% or \$)
  - Per-event-registration charge
  - Per-email-sent charge
  - Upgrades
  - Updates
  - Bandwidth
  - Storage space



### About GrowthZone

GrowthZone AMS helps organizations grow and retain membership, engage and inform members and prospects, and streamline tedious tasks. The cloud-based system is powerful, easy to use, and designed to manage all the day-to-day operations of your organization. Guaranteed.

Contact us today for a personalized product demo.