

# Association Management Software Buyer's Checklist

How to choose the right AMS solution  
for your association.



# Association Management Software Buyer's Checklist

## Introduction

This Buyer's Checklist for association professionals is designed to help you make an "apples to apples" comparison of association management software (AMS) systems so you can make the right purchasing decision for your association.

## Vendor Selection

There are many AMS vendors to choose from. However, each solution on the market is unique. Here's how to begin your search.

- Ask around. Get referrals and input from other associations like yours. Ask what system they use, what they like, and what features are lacking.
- 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).
- Research whether the vendor is in good standing with the Better Business Bureau.
- Ask how many membership organizations 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. A free product demo should be easy to schedule, give an overview of the product functionality, and provide opportunities to ask questions.

# Association Management Software Buyer's Checklist

## Features/Functionality

Use this checklist to analyze what you need vs. what would be nice to have to help determine which AMS system will best meet your requirements.

### Billing/Financial

	Need	Nice to Have
Recurring/automatic 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"/>
Third-party financial reporting	<input type="checkbox"/>	<input type="checkbox"/>
Options to automatically drop expired members	<input type="checkbox"/>	<input type="checkbox"/>

### Member Recruitment

Monetize and track sales opportunities	<input type="checkbox"/>	<input type="checkbox"/>
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### Website

New website	<input type="checkbox"/>	<input type="checkbox"/>
Responsive website for mobile viewing	<input type="checkbox"/>	<input type="checkbox"/>
Website content management (i.e., the ability to easily update your website yourself)	<input type="checkbox"/>	<input type="checkbox"/>
Blog post creation	<input type="checkbox"/>	<input type="checkbox"/>
Integration with member database and event calendars	<input type="checkbox"/>	<input type="checkbox"/>
Online store	<input type="checkbox"/>	<input type="checkbox"/>
Online membership application	<input type="checkbox"/>	<input type="checkbox"/>

### Events

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"/>

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## Features/Functionality

	Need	Nice to Have
<b>Reporting</b>		
Standard and custom reports	<input type="checkbox"/>	<input type="checkbox"/>
Real-time information updates	<input type="checkbox"/>	<input type="checkbox"/>
<b>Access</b>		
Customizable access levels for members and 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"/>
<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>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)	<input type="checkbox"/>	<input type="checkbox"/>
<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>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"/>

# Association Management Software Buyer's Checklist

## Ease of Use

An AMS 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 if the system is easy to use and meets your needs.
- Find out what kind of user 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).

## Onboarding & Integration

While some associations are large enough to employ an IT team to handle the transition process (aka onboarding), most are not.

- Find out if the vendor follows an onboarding process and what it includes (and doesn't include).
- 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 customer 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.).

# Association Management Software Buyer's Checklist

## Access to Data

It's critical for association staff to have their AMS system accessible wherever or whenever they're working.

- Determine if the system is cloud-based, allowing for a single shared view of member information and making updates on-the-go.
- Find out if access levels can be set that restrict staff access to specific information.
- Ask how many user licenses are included.
- Verify who owns the data, how you can access it, and how it is secured.
- Make sure your solution comes with a mobile app for your staff.

## 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

The GrowthZone mission is to empower organizations with the tools they need to grow membership, keep members engaged, keep members longer, and do more in less time.

GrowthZone is a full Membership Management System with built-in payment processing, e-commerce, fundraising, marketing automation, member prospecting, and more. GrowthZone is ideal for chambers of commerce, business, trade, and professional associations.

### **GrowthZone features a comprehensive suite of productivity modules for membership organizations, including:**

- ✓ Website Content Management
- ✓ Email Marketing Automation
- ✓ Fundraising
- ✓ Billing
- ✓ Event Registration
- ✓ Event Exhibitor/Session Management
- ✓ Membership Prospecting
- ✓ Payment Processing
- ✓ Certification Tracking
- ✓ Chapter Management
- ✓ Mobile Staff App
- ✓ Website Hosting
- ✓ Advertising/Sponsorship
- ✓ Online Store
- ✓ Project Management
- ✓ Form Builder
- ✓ Job Boards
- ✓ Contacts
- ✓ Communication
- ✓ Lists/Committees
- ✓ Fundraising

**Schedule a quick, no-pressure demo  
to see GrowthZone in action**

**SCHEDULE DEMO**