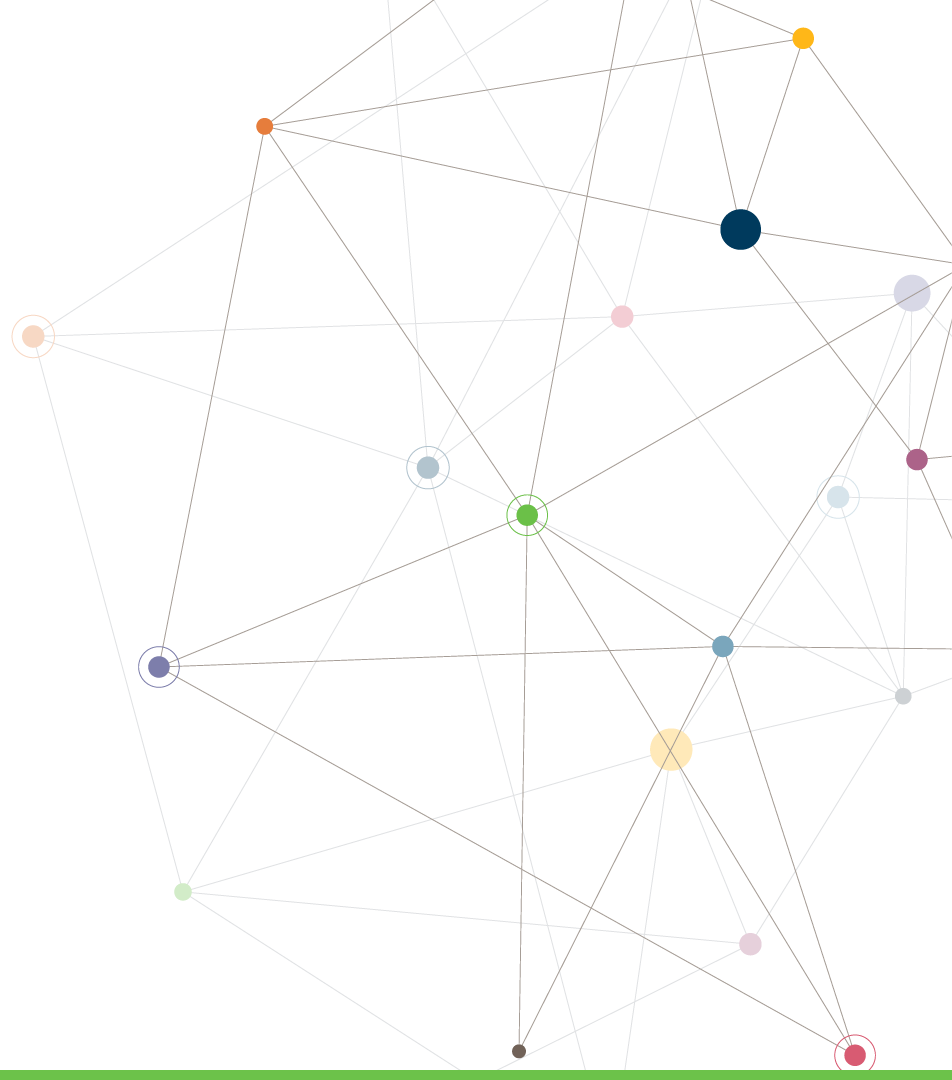# AMS BOOTCAMP

AMS Fest

June 2024
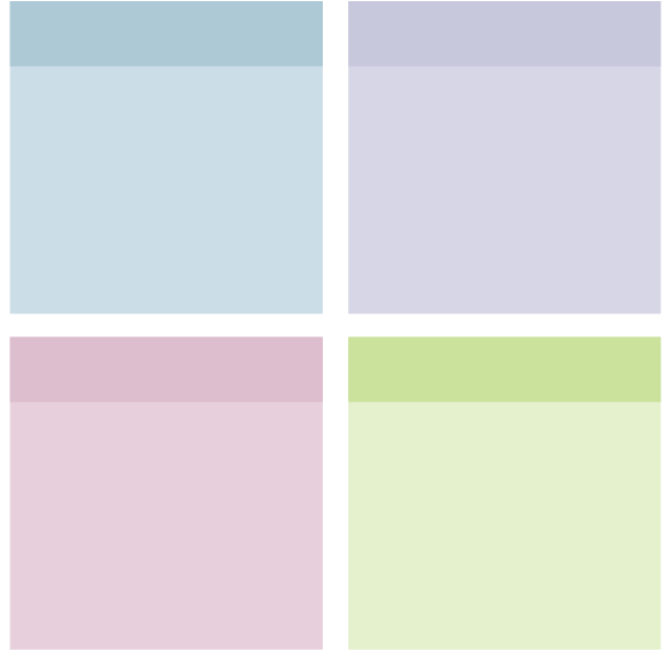
EXERCISE: OUR MAIN CONCERN IS…

WORD WALL (Post-Its)

What are your system concerns?

What are your vendor concerns?

I want to make sure we cover….

What is your confidence level?

INTRODUCTIONS: TECHNOLOGY GUIDES

Gretchen Steenstra
Kitten Fosterer

Norma Castrejon
Hedgehog Friend

DELCOR SNAPSHOT

DC OFFICE:
SILVER SPRING, MD

MIDWEST OFFICE:
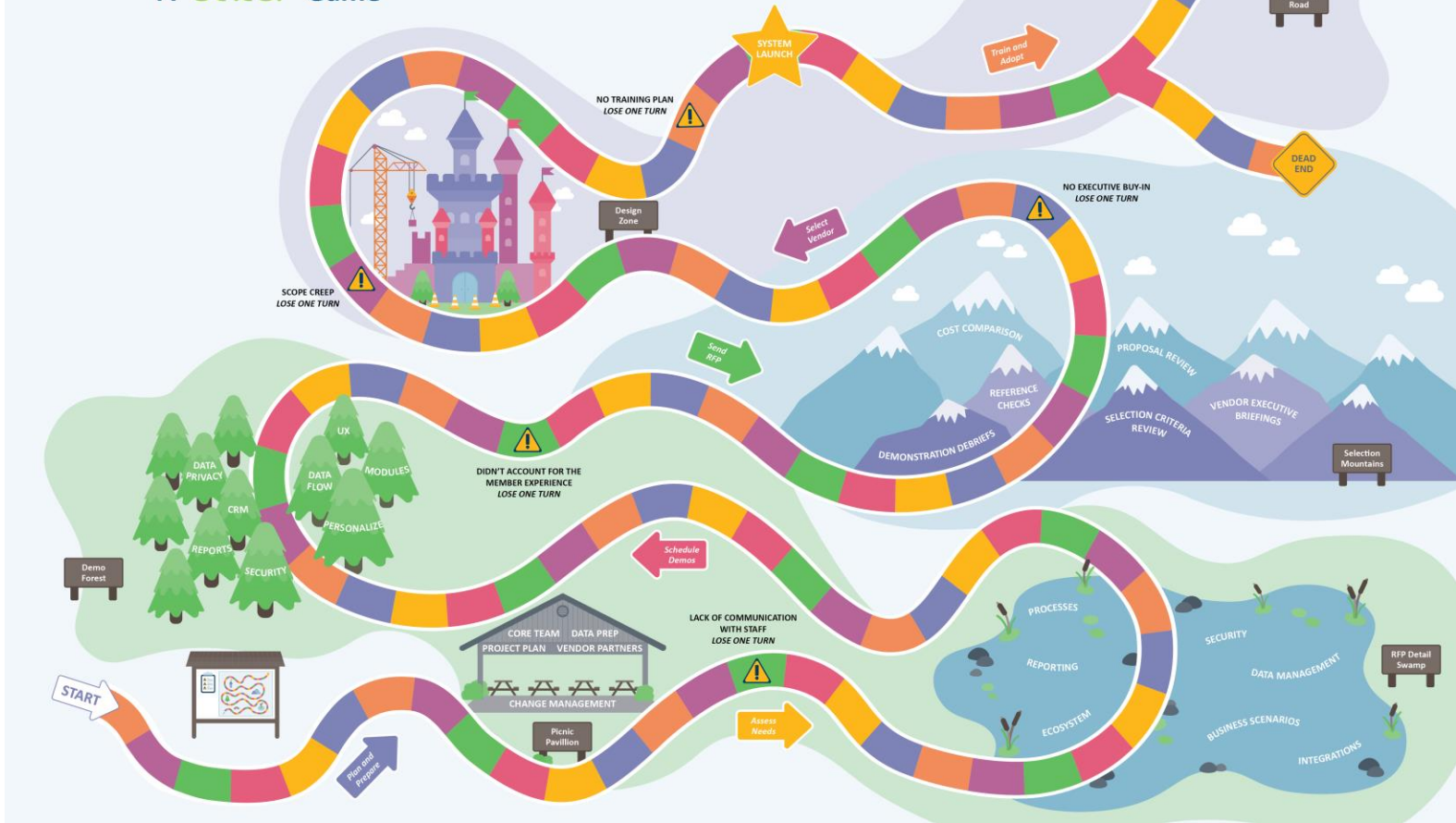CHICAGO, IL

501(C) COMMITMENT	35+ YEARS IN BUSINESS	90+ FULL-TIME STAFF	40+ DIFFERENT CERTIFICATIONS	VENDOR-AGNOSTIC CONSULTING

AGENDA

Manage the Change for People

- Establish a foundation for change

System Selection 101

- Warm Up

- Essential Selection Steps: What is critical vs. nice to have?

- Tools: Discuss and test tools to help develop the selection documents (charter, RFP, review, etc.)

- BREAK
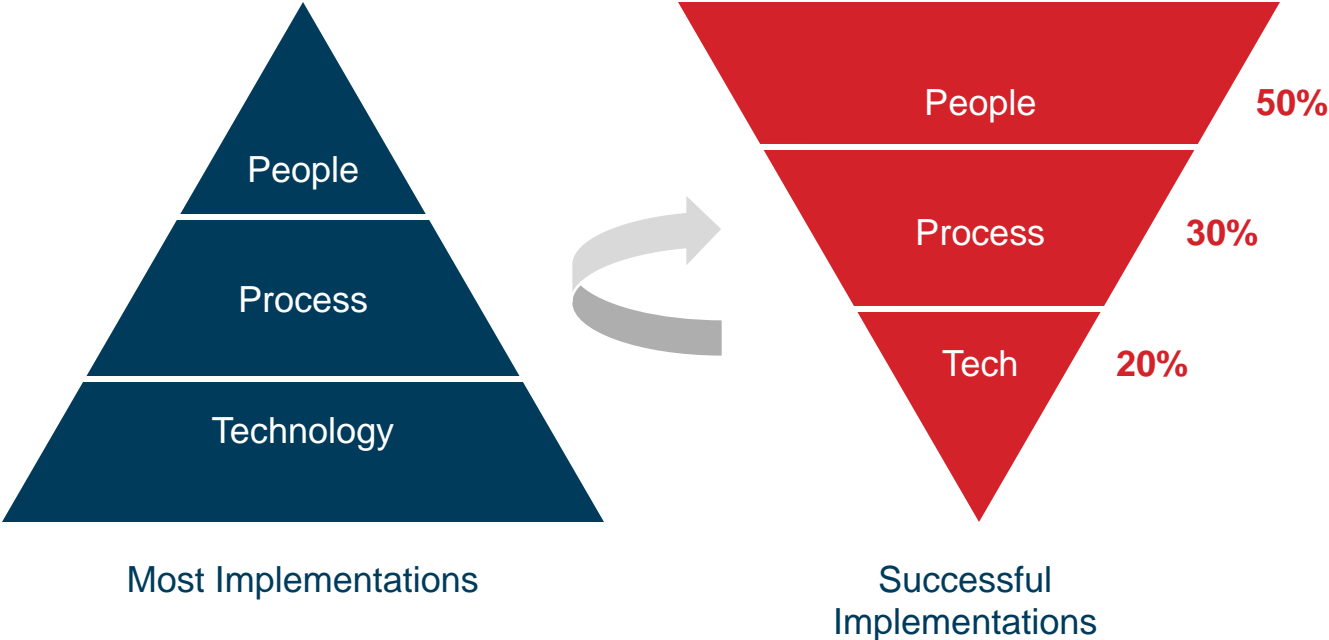
System Selection Details

- Business Processes: What do you need to consider, define, and adjust NOW versus during the Implementation Phase?

- Requirements: Review several approaches to develop and share business requirements

- Selection Decisions: How do you evaluate RFPs, compare prices, and select a vendor?

- Contracts: What should associations consider to augment the legal review?

CHANGE MANAGEMENT

WHY DO BIG TECH IMPLEMENTATIONS FAIL?

Most Implementations

People

Process

Technology

Successful Implementations

People — **50%**

Process — **30%**

Tech — **20%**

CHANGE MANAGEMENT: PEOPLE

Change control is the decision to make a change, whereas change management refers to the aftermath of that decision. The fundamental elements of change management are key to a successful launch.

Engagement

Understanding

Preparation

Adoption

Reinforcement

CHANGE CONTROL VS. CHANGE MANAGEMENT

Change control is the decision to make a change, whereas change management refers to the aftermath of that decision.

Change management = [change control] + communication + training + adoption

CHANGE MANAGEMENT

- Create a process to make decisions

- Staff and members WILL be:

    - Annoyed, frustrated, scared, nervous, and EXCITED!

- Plan for mistakes with the vendor

    - Some changes look good on paper, but they don't work

    - You will learn and processes will evolve, so plan for it

TECHNICAL CHANGES>IMPACT

CONFIG CHANGE

ADD WORKFLOW/AUTOMATION

VALIDATION (AUTOMATED, MANUAL)

INTEGRATION/PARTNERS

NON-TECHNICAL CHANGES

New Manual Process

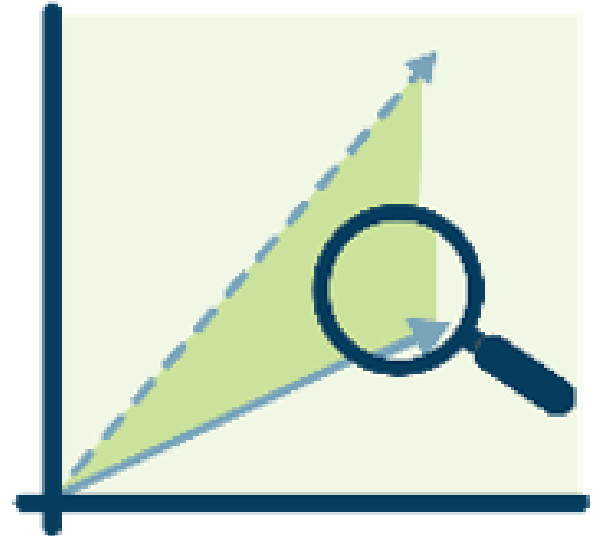Loss or change of functionality

More configuration and workflow options

Fewer configuration and workflow options

ADOPTION – START PLANNING

- **System Change -> Work Change**

- **Identify Major Changes now**
  - System
  - Staff Process
  - Member Expectations

- **Training**
  - What can you learn now?

AMS, CRM OR ??

AMS VS CMS

Function (Sample)	AMS	AMS/CRM Blend	Enterprise CRM + Apps
Customer Management	✓	✓	✓
Awards	✓	✓	Integrate with App
Chapters	✓	✓	Integrate with App
Committees	✓	✓	✓
E-Commerce	✓	✓	Integrate with App
Events	✓	✓	Integrate with App
Finance	✓	✓	Integrate with App
Membership	✓	✓	Advanced Config
Products	✓	✓	Integrate with App

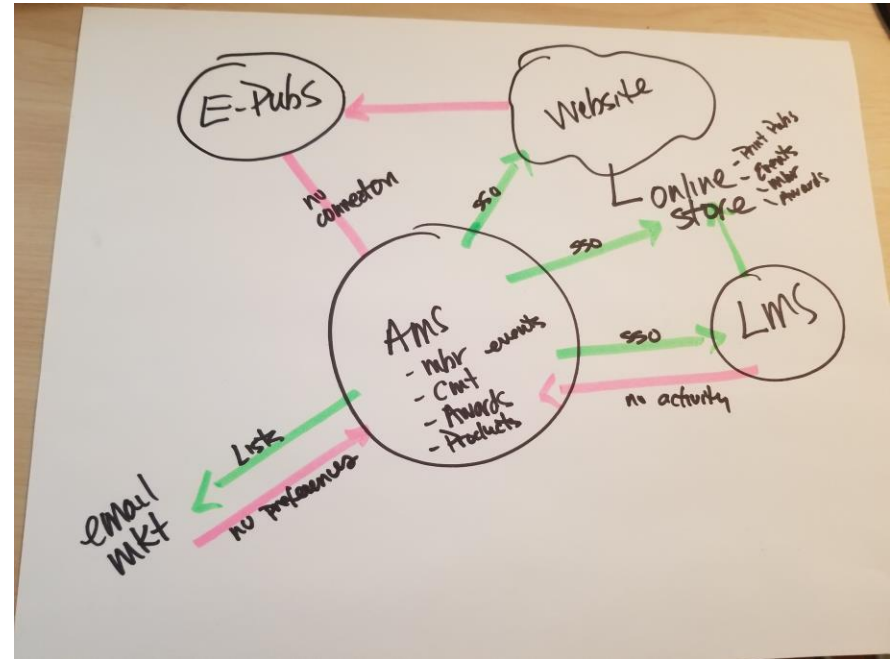# RELATIONSHIPS: SYSTEM, VENDOR, AND ASSOCIATION
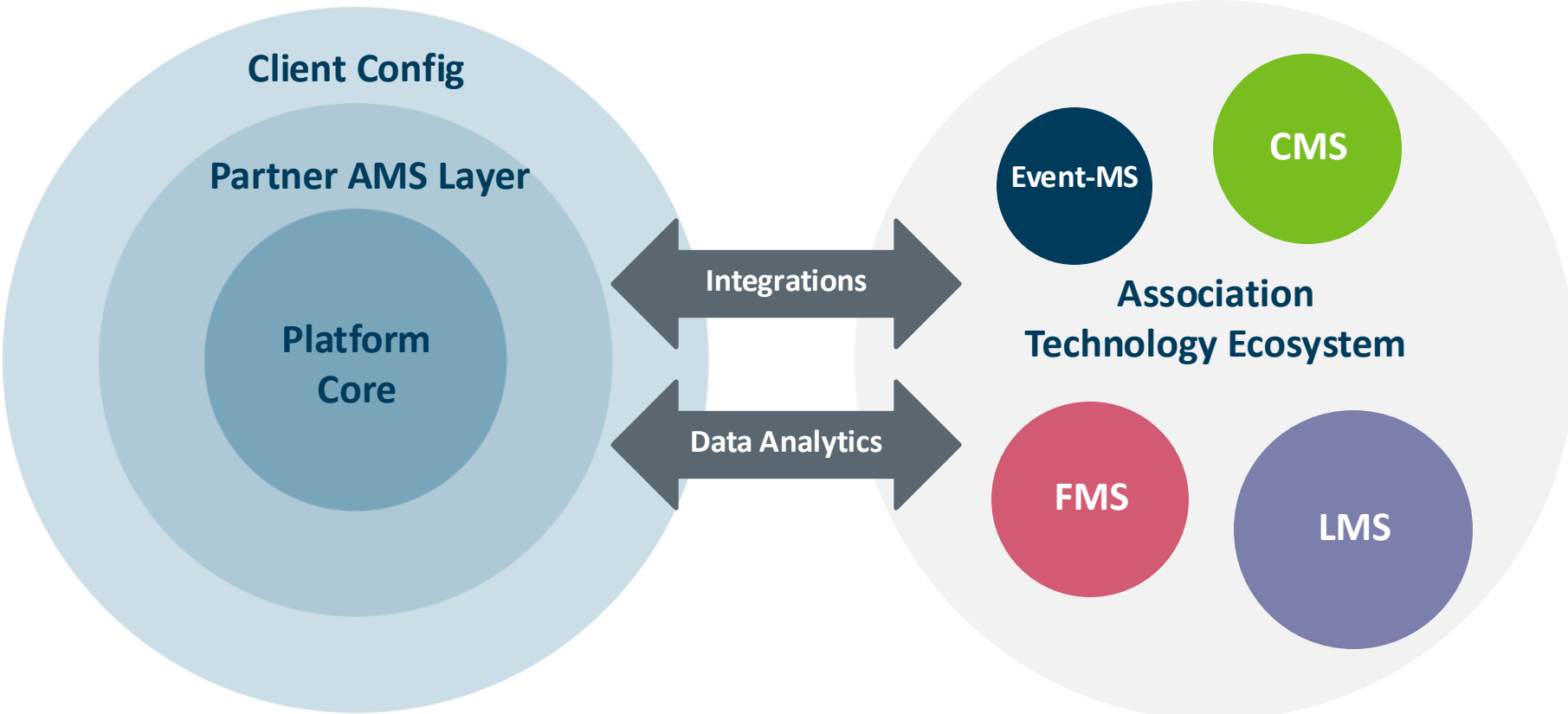
ECOSYSTEM: DRAW YOUR ECOSYSTEM (SCREEN BREAK)

Include if:

1. **Revenue**
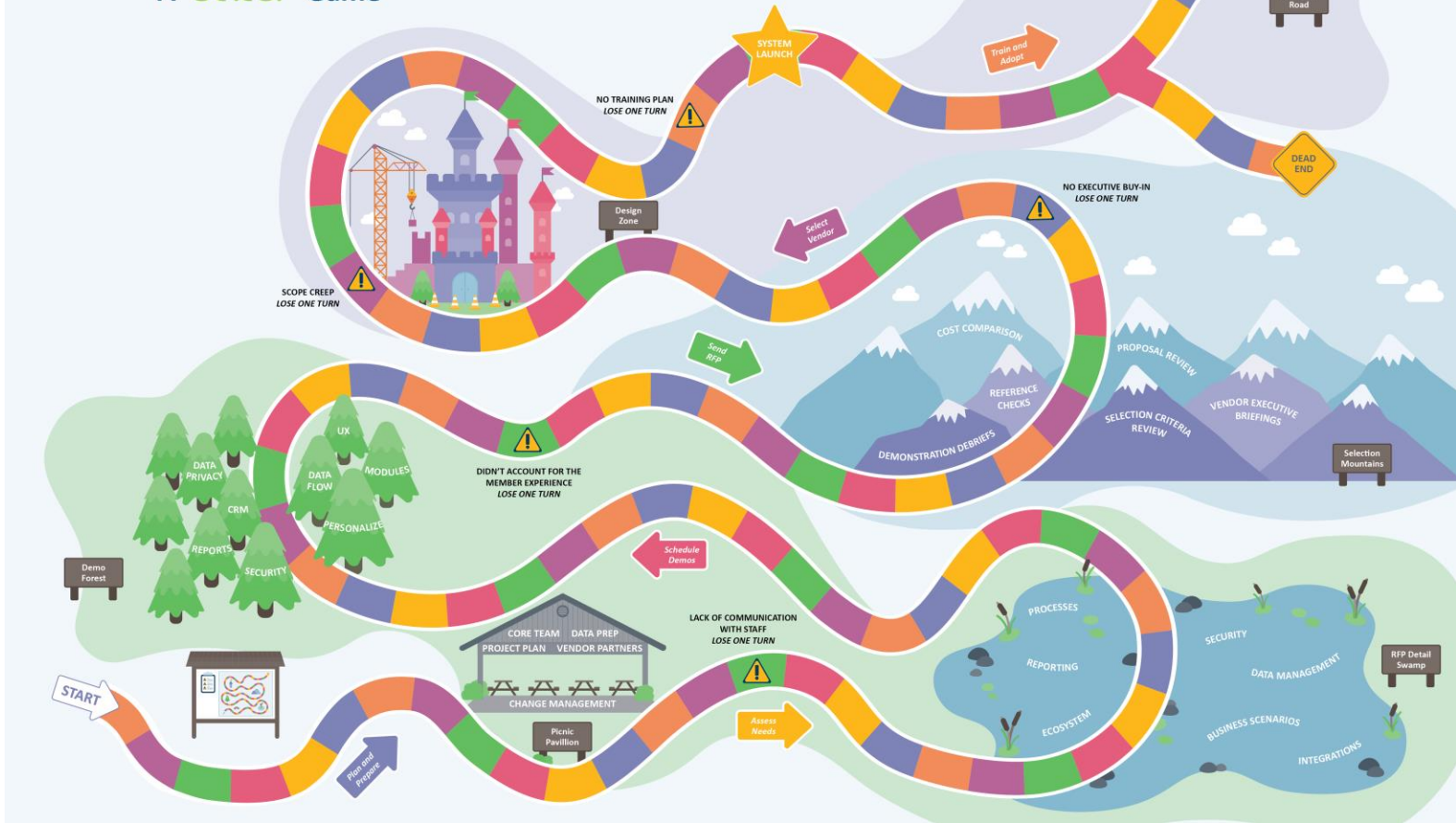
2. **Member benefit (real one)**

3. **Support future growth**

OTHERWISE

-Leave it behind or integrate

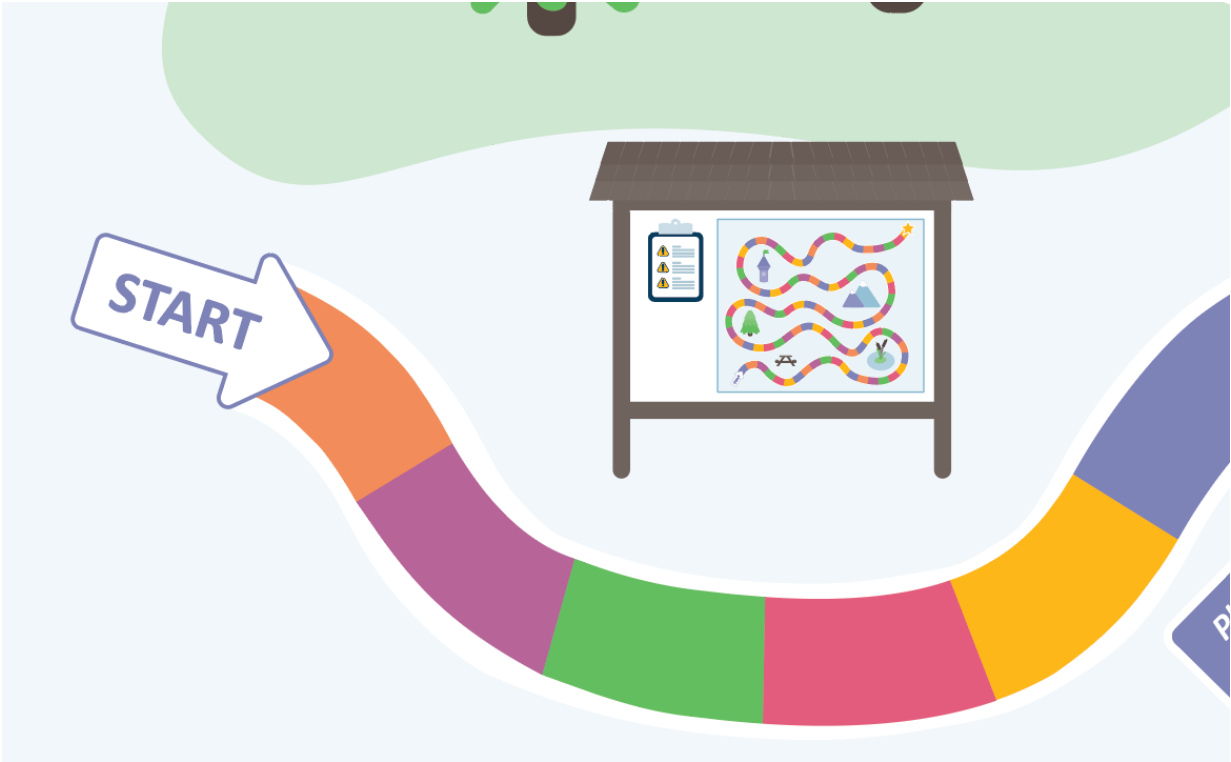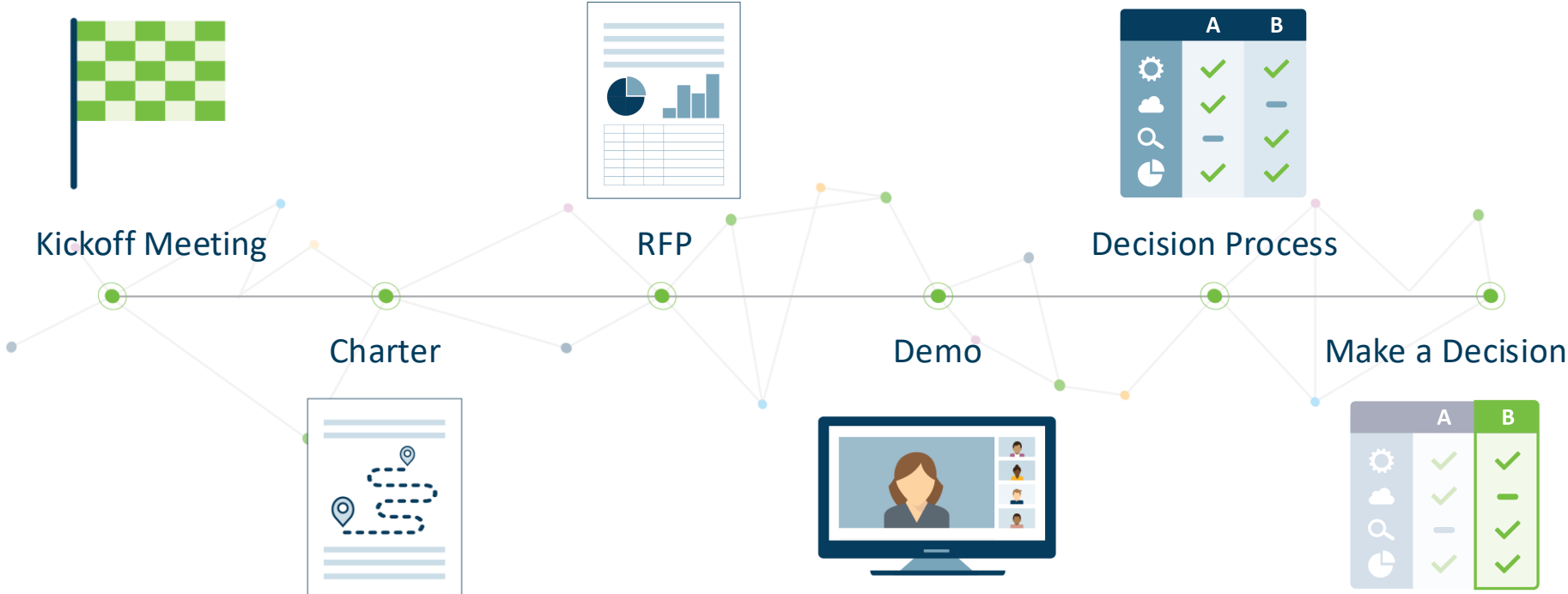# POLL

How long should the selection take?

a) 1-3 months

b) 3-6 months

c) 6-9 months

d) 12+ months

SYSTEM SELECTION PHASES

Kickoff Meeting

Charter

RFP

Demo

Decision Process

Make a Decision

GET SET

Get Set

- Project Scope
- Team
- Plan

Docs and Demos

- Requirements
- Vendors
- Demos

Proposal & Selection

- RFP
- Proposal
- References

CORE TEAM - SELECTION

How many people should be on your core team? Do you have the following?

- Decision Maker

- Business Owners

- Finance

- Marketing/Communication

- Customer Service

ROLES AND RESOURCES

- Identify staff roles

- What resources will be needed?

  - Time needed

  - Duration

  - Communication

- Staff roles
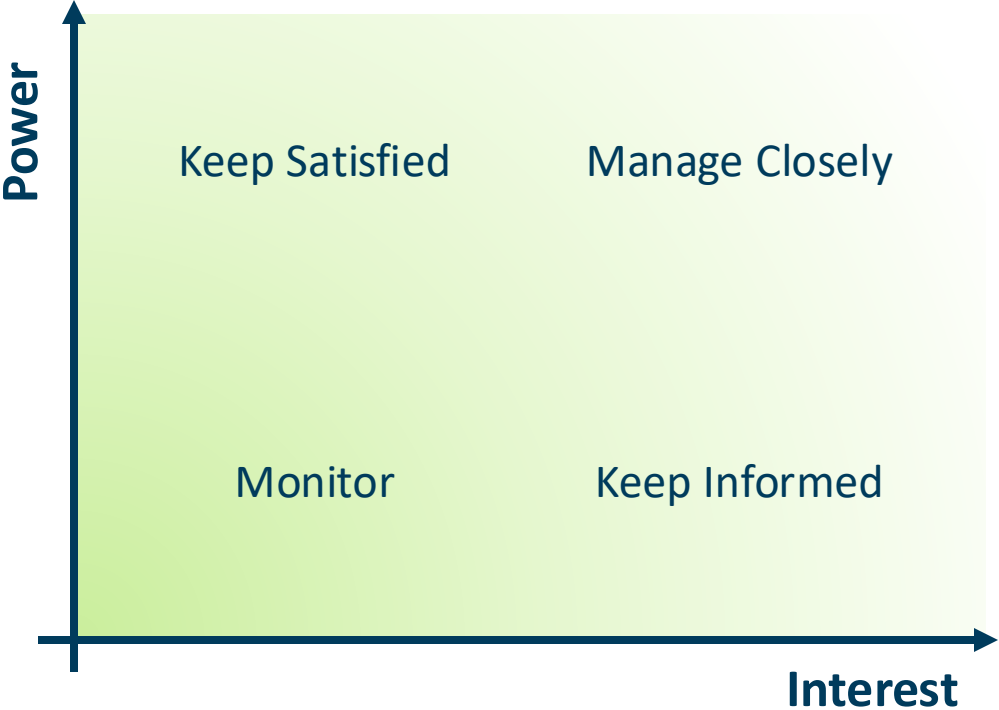
  - Backfill position

  - Longer hours

  - Temp

ENGAGEMENT

- **Change Team**

- **Vendor/Partners**

COMMUNICATION: STAKEHOLDER ANALYSIS (FLIPCHART)

Dry Run for Selection – Critical During Implementation

COMMUNICATION: RACI CAN MAKE OR BREAK

| Responsible	Accountable	Consulted	Informed
• Carries out the process or task assignment • Responsible to get the job done	• Accountable for the process or task being completed appropriately • Responsible person(s) are accountable to this person	• Not directly involved with carrying out the task, but are consulted • May be a stakeholder or a subject matter expert	• Receive output from the process or task, or those who have a need to stay informed

COMMUNICATION: RACI EXAMPLE

The discussion of roles is as important as the chart. Only 1 A (Accountable)

RACI Matrix						
Task	Project Manager	Business Analyst	Technical	Development	Finance	Executive
Project Planning	A	I	C	C	C	C
Project Initiation	A	I	I	I	I	I
Project Charter	A	I	C	C	I	I
Stakeholder Analysis	A	C	C	C	I	I
Develop Use Cases	A	R	R	R	R	R
Participate in Demos	A	R	R	R	R	R

SELECTION TIME COMMITMENT

Phase	Timeframe	CLIENT Staff Task	Staff Time Commitment	
			Core Team	Stakeholders
I: Selection Planning and Initiation	4-5 weeks	Prepare Background Information for Review	2 hours	
		Participate in Initial Meeting	2 hours	
		Participate in Project Kickoff Meeting	1 hour	1 hour
II: Discovery and RFP Development	4-5 weeks	Participate in Discovery Meetings	1-2 hours per relevant session	1-2 hours per relevant session
		Participate in Meeting to Discuss Vendors	1 hour	
		Participate in Demonstrations (3)	24 hours	12-16 hours
		Participate in Demonstration Debriefs	3 hours	Optional
IV: Vendor Selection	4-5 weeks	Participate in Discussion to Identify Finalists	1 hour	
		Review Proposals (2)	2 hours min.	
		Participate in Final Vendor Selection Discussions	4 hours	
V: Contract Negotiations	3-4 weeks	Participate in Contract Negotiations	TBD	
VI: Implementation Planning and Initiation	TBD	Review Implementation Transition Plan	1 hour	
		Participate in Vendor Discovery Preparation	4-8 hours	
		Attend Vendor Discovery Meetings	TBD	
VII: Implementation Project Management	TBD	Participate in System Implementation with Vendor	TBD	TBD

Implementation Resource Commitment
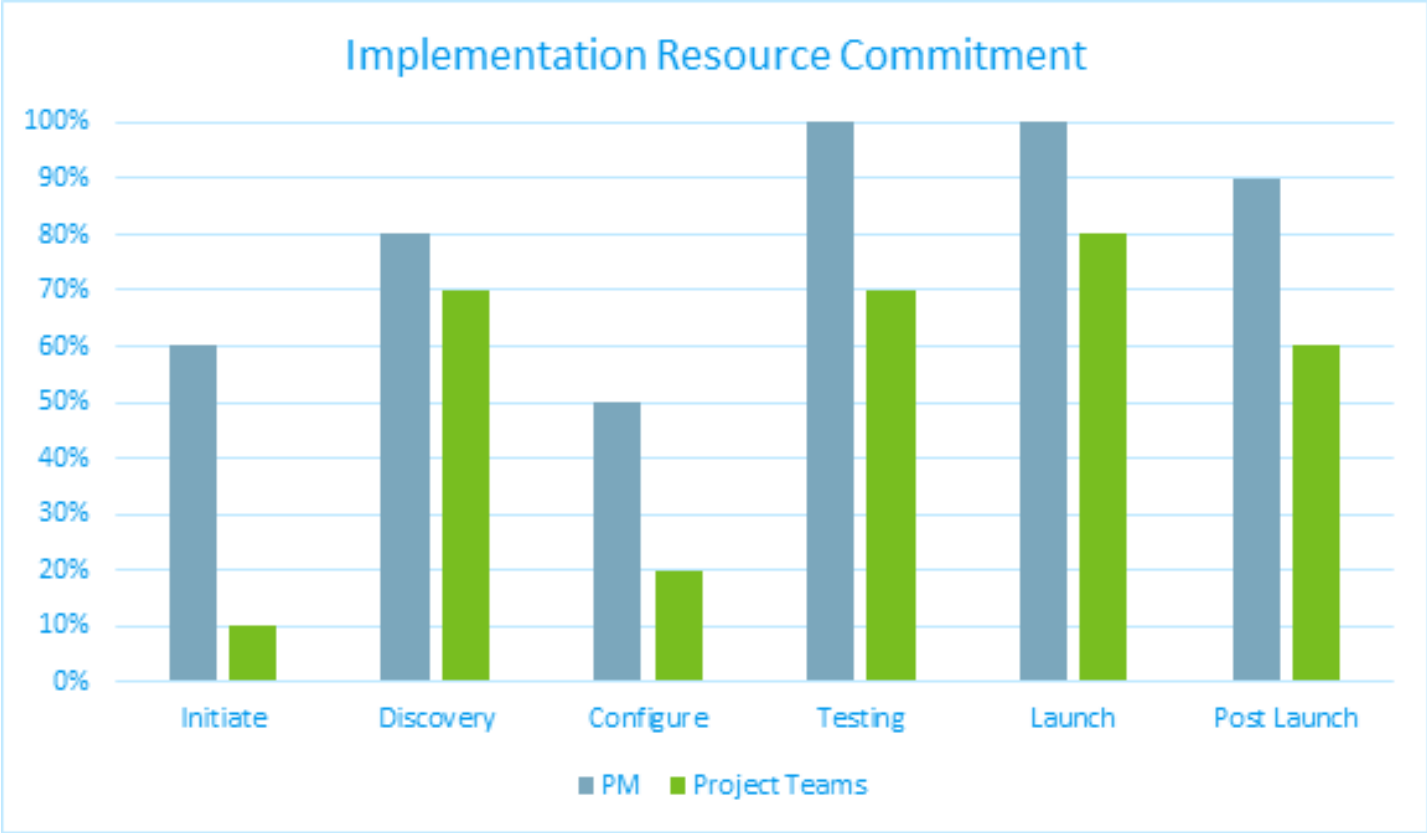
LACK OF COMMUNICATION

Lose a turn!
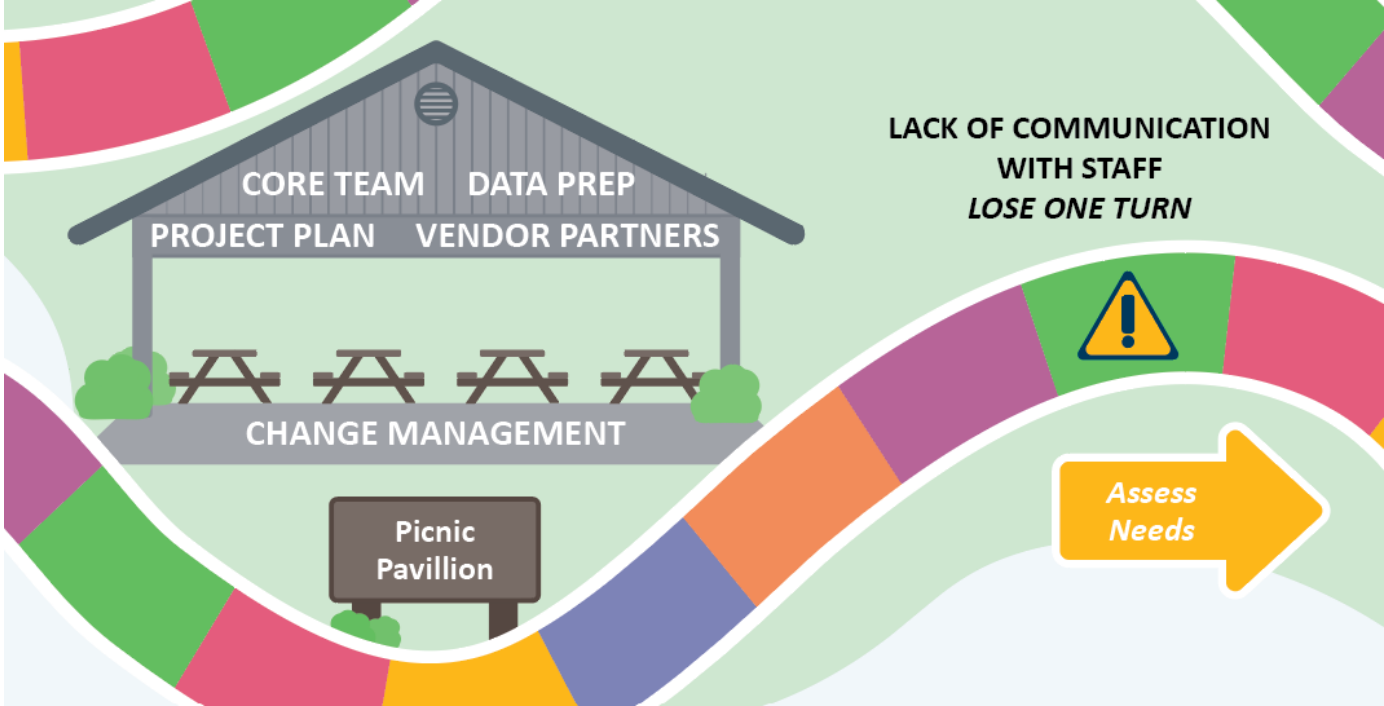
COMMUNICATION: PLAN AND IDENTIFY TOOLS

- Same info as a new product launch

  - Who, what, where, why, when

- Collaboration – what tools are being used?

  - Chat

  - Official information (e.g., requirements, decisions)

  - Updates/Status Reports

COMMUNICATION: INTERNAL AND EXTERNAL

- Internal

  - Updates of milestones and progress

  - Project Team, Staff, Leadership/Board

- External

  - Updates to leaders and members

  - Keep Vendor Partners informed

  - 'Coming soon – new registration process'

  - Ask members to provide feedback

PROJECT CHARTER

5 W's (Who, What, Where, When, Why)

Why are you starting to look?

Why now?

What is your pitch?

If you can't state your goal right now, you may not be ready

Association focus on WHAT and WHY

Vendor focus on HOW?

DISCOVERY TRAILHEAD

DOCS AND DEMOS

Get Set

- Project Scope
- Team
- Plan

Docs and Demos
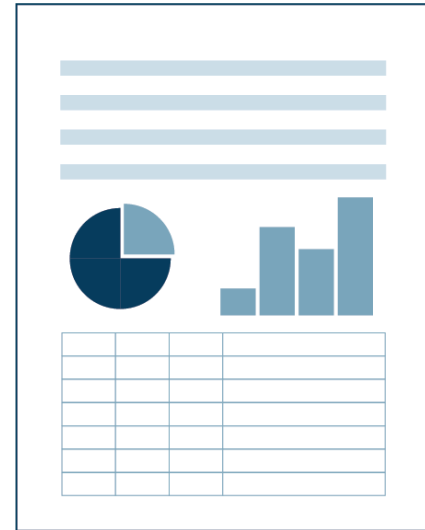
- Requirements
- Vendors
- Demos

Proposal & Selection

- RFP
- Proposal
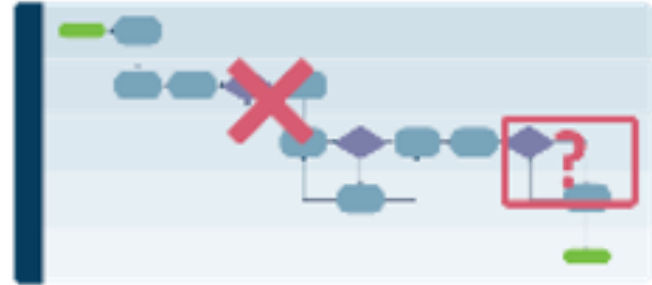- References

WHY A REQUEST FOR PROPOSAL (RFP)?

Use the RFP to organize your needs and state your goals.

- Focus on your business needs

- Align association goals and business functions

- Refresh and improve processes

- CLARITY (check the box)

- Same info from each vendor

CHANGE MANAGEMENT: UNDERSTANDING

- **The way you work**

- **Trade Offs**

- **Keep a LIST**

IDENTIFY AREAS OF POTENTIAL CHANGE

Use the selection process to identify business processes that may need to change

Difficult requirements

Areas that require customization

Processes that need the most customer service/TLC

Processes that support the most revenue

Processes that can be automated

WHERE DO YOU FIND REQUIREMENTS?

Standard Operating Procedures (SOP)

Tribal Knowledge

Organizational Goals

Member/Customer Needs and Processes

Staff Needs and Processes

TELL YOUR STORY

Find the best way to tell your story

Break it down into requirements – focus on what vs how

Functional Requirements (System Behaviors)

Non-Functional Requirements (System Performance)

COMPLETE	CONCISE	RELEVANT
SPECIFIC	TESTABLE	TRACEABLE
	VERIFIABLE	

CREATE A USER STORY

User stories:

- Are a way to simplify requirements.

- Expose the detailed requirements.

- Highlight the business reason for each functionality.

- Are testable.

As a...	I want to...	So that...	Acceptance Criteria
Member	Renew Online	I can pay immediately with my credit card	

DATA: A SOURCE OF CHANGE

What are you REALLY doing with your data?
What is the relationship between data and process?

- Data conversion

- Report inventory

- Data standards

- Data integration

REVIEW YOUR REQUIREMENT

- Is it comparable?

- Is it scorable?

- Is it a single requirement/single answer (baseline Y or N)?

- Can a stranger understand it?

- Do you need to add context? Vendors don't know all the facts about your 'special' process.

HELP VENDORS FOCUS

What needs to be in the RFP that's a balance of EVERYTHING and too little?

Discussion?

30 vs 300 individual requirements.

ANALYSIS: WHAT IS THE MOST IMPORTANT?

Category	Criteria
IMPACT	Strategic Alignment
	Member Value
	Operational Value
	Business Value
	Financial
EFFORT	People
	Costs
	Duration
RISK	Technology
	Management

BUSINESS AND PROCESSES: JUST ENOUGH DETAIL

BUSINESS processes

VS

business PROCESSES
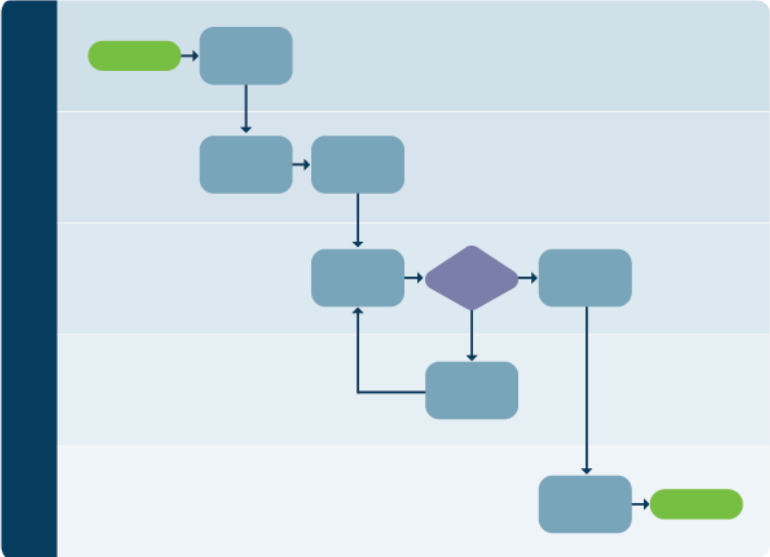
10 MIN…GO!

REQUIREMENTS: TELL YOUR NEIGHBOR

- Can you explain your business rule to a stranger?

- What is your business OUTCOME?

- What are the exceptions for small groups or individuals?

- Is it written for the legacy system?

PULL IT TOGETHER TO BUILD THE RFP

Why do I need an RFP? Can't I just ask for a proposal???
Checklist:

o   Introduce the project

o   Background of your organization

o   Project goals and scope

o   Business objectives

o   Overview of functional areas

o   **Ecosystem Current and Future**

o   Specific questions and needs (e.g., requirement)

o   Instructions to vendors

RELEASE THE RFP?

TRUE
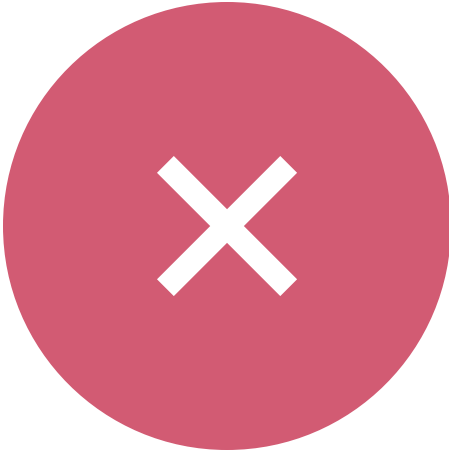
FALSE

POLL

How many vendors should I consider?

a) 8

b) 2

c) 5

d) 3

e) All of the above (18)

VENDORS: TALK TO THEM!

Tell vendors what you need and then make them prove they can do it!

- Be honest

- Provide an overview of your association

- Discuss current AND future needs

- Share general budget range

- Share staff size and resources

- Use your RFP as a guide

SELECTION CRITERIA: HIGHLIGHTS

Functional Requirements

Customer-Facing
e-Commerce
Exports

Platform and Services

Integrations
Partners

Cost Requirements

Licensing
Implementation

Vendor Requirements
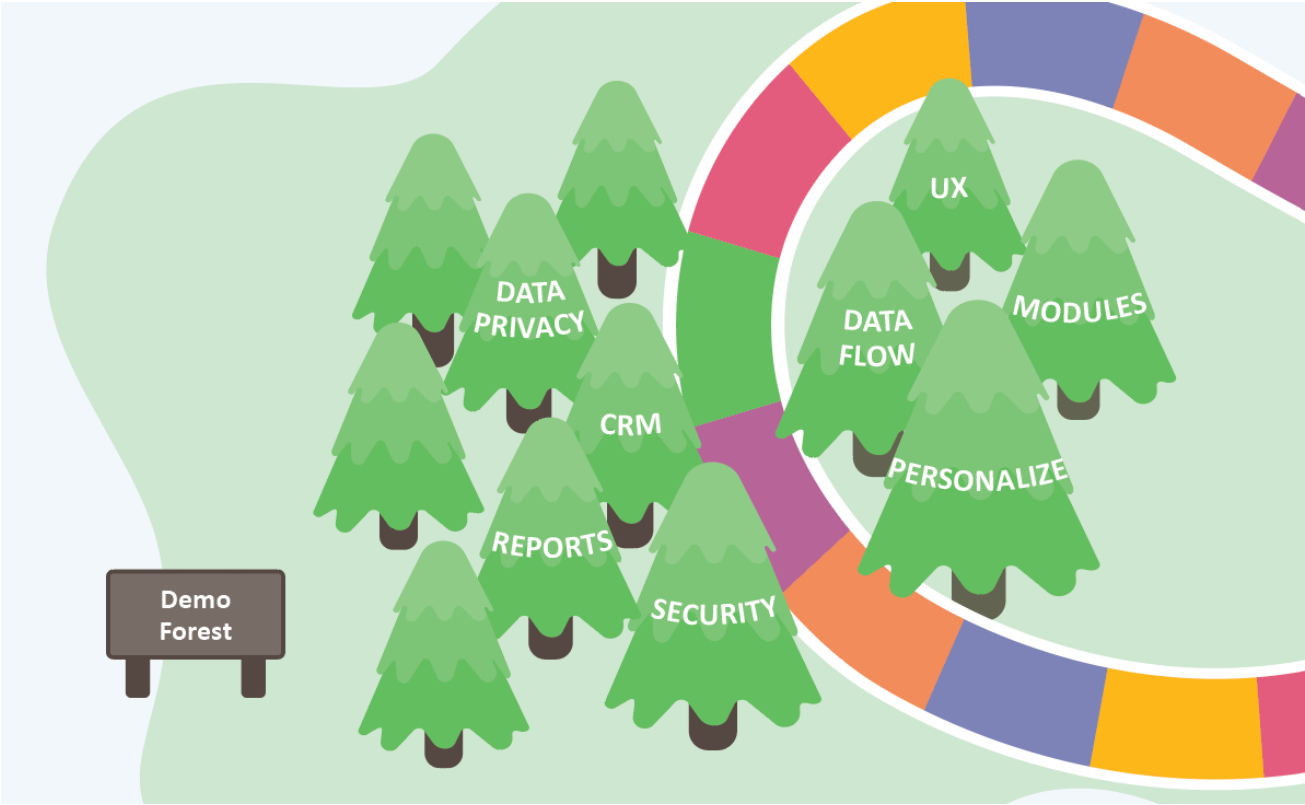
15 MIN…GO!

DEMOS: PREPARATION

- Provide Vendors

  - General agenda and outline

  - Business scenarios (tell the story of a set of requirements, describe critical, complex processes – bulk dues, group registration, chapter management)

  - Sample event and registration form

  - Draft RFP (for additional reference)

- Decide your process to evaluate vendors

DEMOS: AGENDA TOPICS

- Introduction
- Navigation
- Customer Management and Experience
- Membership
- Finance
- Query/Reports
- IT/Platform

DEMOS: OTHER CONSIDERATIONS

Depending on critical functions of your association, include the following:

Meetings/Events   Education/Certification   Publications

DIDN'T ACCOUNT FOR MEMBER EXPERIENCE!

Lose a turn!

DEMOS: IN-PERSON VS VIRTUAL

In-Person

- One full day to cover critical topics

- Follow-up demos as needed

Virtual

- One full day with a break

- Two half-day demos (either back-to-back or by topic)

- AVOID too many short meetings – you need time to focus

DEMOS: TIPS FOR VIRTUAL DEMOS

- **Pre-Test:** Ask vendors to join 15 minutes early to test access

- **Record:** Will vendors allow you to record and share?

- **Ground Rules:**

  - Identify a staff member to manage the schedule and give a 10-minute notice before a section's ending time

  - Once demo begins, staff will mute and turn off their camera to focus on the demo (okay for vendors to do same)

  - Use virtual chat feature to submit questions for vendor

EVALUATING DEMOS

Don't get distracted in notes. Focus on performance of key scenarios.

Create a 'Scoring Sheet' for Staff

- KISS

- Survey after each demo

- Focus on differentiating factors

  - E.g. customer experience, reporting, workflow tools, number of clicks

Debrief Immediately

- Score the vendor and submit right after the demo

- Identify follow-up

- Decide to keep or reject (remember that this is a SELECTION)
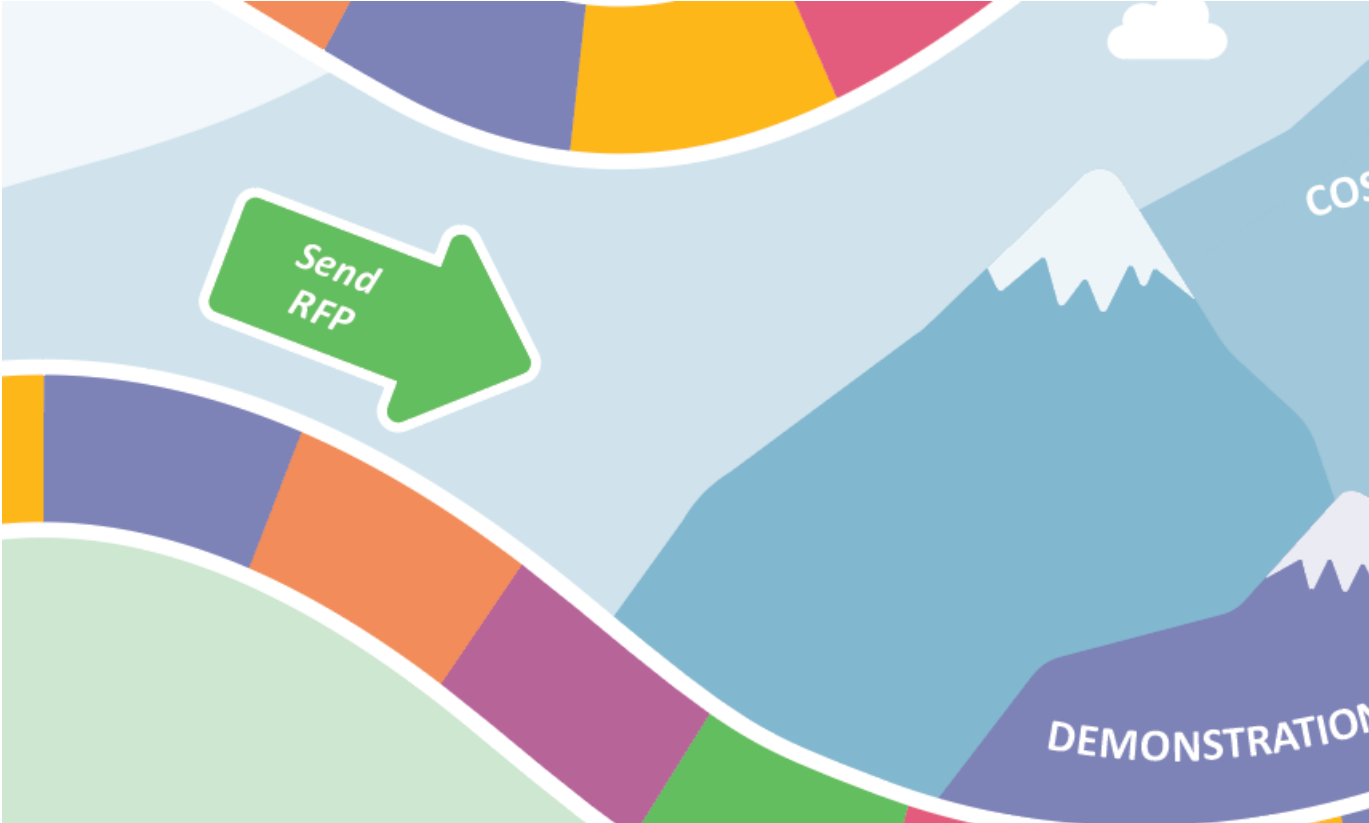
SHOULD I INCLUDE STAFF FEEDBACK THAT'S INCOMPLETE?

YES
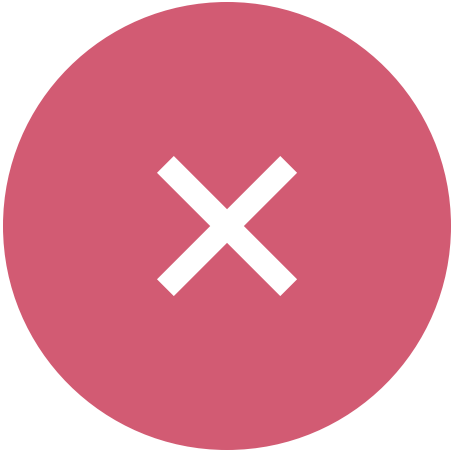
NO

CAN YOU ELIMINATE 1 VENDOR?

Don't forget, this is a selection to identify **one** vendor.

It's easier to compare two proposals, so consider eliminating a vendor after demos.
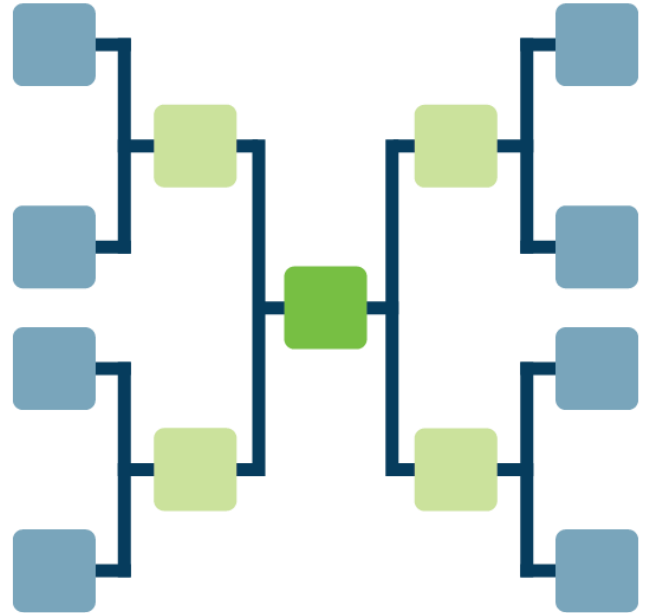
SEND RFP – ASK FOR A PROPOSAL

RELEASE THE RFP AND THEN….

- Update selection criteria

- Define reference questions
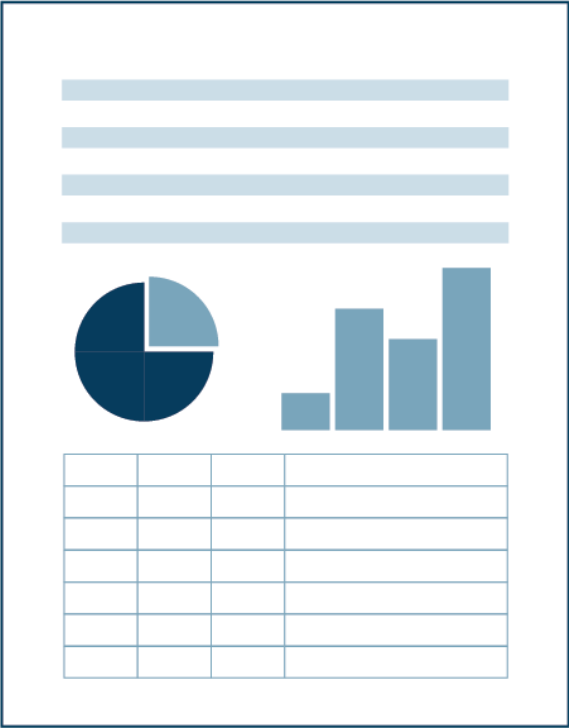
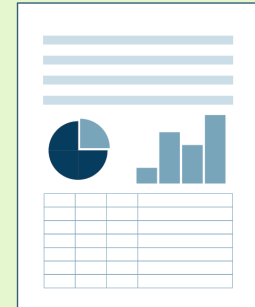# PROPOSAL & SELECTION

Get Set

- Project Scope
- Team
- Plan

Docs and Demos

- Requirements
- Vendors
- Demos

Proposal & Selection

- RFP
- Proposal
- References

SECTION BREAK: SELECTION MOUNTAINS

IMPACT ANALYSIS

What is changing?	
Process today	
What do you want to happen – future?	
What policies, processes are needed?	• System, Workflow, Outputs, Communication
Who is involved?	• Business Owner, Finance, IT, HR, Partners

SCORING THE PROPOSALS

Don't make this too hard – focus on key elements that are essential

- Reference Check Feedback

- System Functionality

- Vendor Implementation Approach

- Vendor Resources

- Cost

- Member and Staff Experiences

HANDOUT: COMPARE VENDORS (COST AND FUNCTIONALITY)

	Vendor 1	Vendor 2	Vendor 3	Contingency Budget
Discovery/Design				
Design Study/Planning				
Installation/Configuration				
System Setup				
Configuration				
Advanced Configuration				
Additional Services				
Data Conversion				
Mobile Apps/Services				
E-Commerce				
Services				
Project Management				
QA				
Testing				
Training (Admin)				
Training (General)				
Documentation				
Integration				
Website				
FMS				
Analytics & Reporting				
Product Licensing Fees				
User Licenses				
Hosting				
Additional Service fees				
Additional Services (e.g. extra test site for year 1)				
Ongoing support costs				
Day to day support				
Upgrade				

BUDGET

ALWAYS have a contingency plan: 20% minimum (don't tell PMI)

What is a good budget?

- 1% of IT budget

- $ per staff person

- Implementation (one time)

- Recurring Costs (licensing & environment)

What partner systems are you considering?

- Event, Exhibit

- DelCor Blog

DECISION

Functionality

Price

Intangibles

Best Choice

IT'S OKAY TO SELECT THE SYSTEM YOU LIKE

- Systems in the same class are similar

- What system can you SEE yourself using?

- Did it make sense during the demo?

- Make a choice

DECISION TIME!

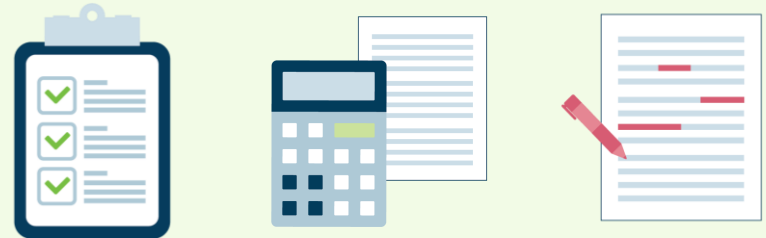# CONTRACT (MSA AND SOW)

Legal

- Data Security
- Insurance
- Intellectual Property
- Service Level Agreement
- Termination
- Warranty...

Work Together

- Acceptance
- Deliverables
- Exit Strategy
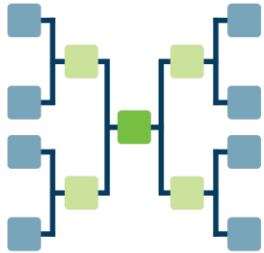- Fees/Payments
- Project Management
- Testing...

REMEMBER… THERE'S NO MAGIC WAND!

- Envision how the AMS fits within your data ecosystem (beholder of all data or piece of the pie)

- Define what success looks like to your organization post-launch

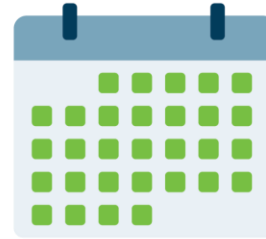- Set realistic expectations for your staff and volunteers

WHAT'S NEXT?

Partner

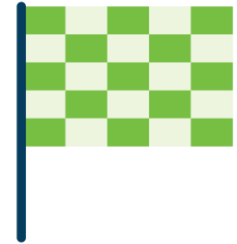Choose the partner that is the best fit for your organization.

Plan

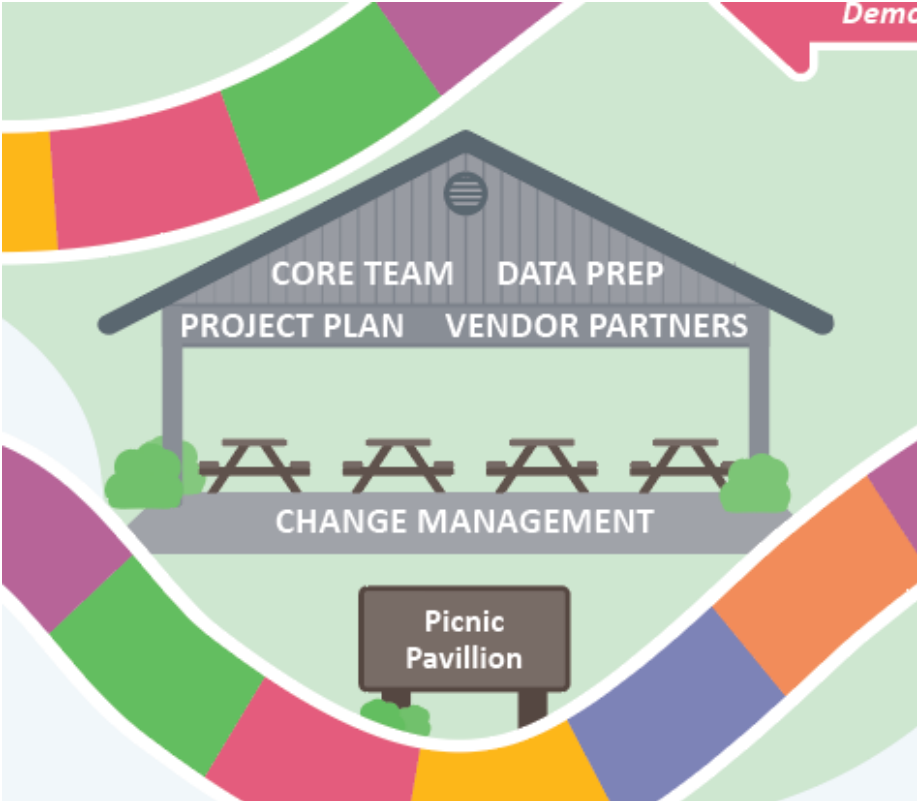Review staff calendars and plan for the selection process.

Schedule

Schedule the project kickoff and discovery meetings.

Start

Get started! There's never going to be a better time to start.

GET READY

Reset the Core Team

Create Data Roadmap

Create a Project Plan

Involve your Vendor Partners

ADOPTION CASTLE

LOSE A TURN!

WHAT AREAS CAN YOU ADDRESS RIGHT NOW?

- Business Processes

- Ecosystem
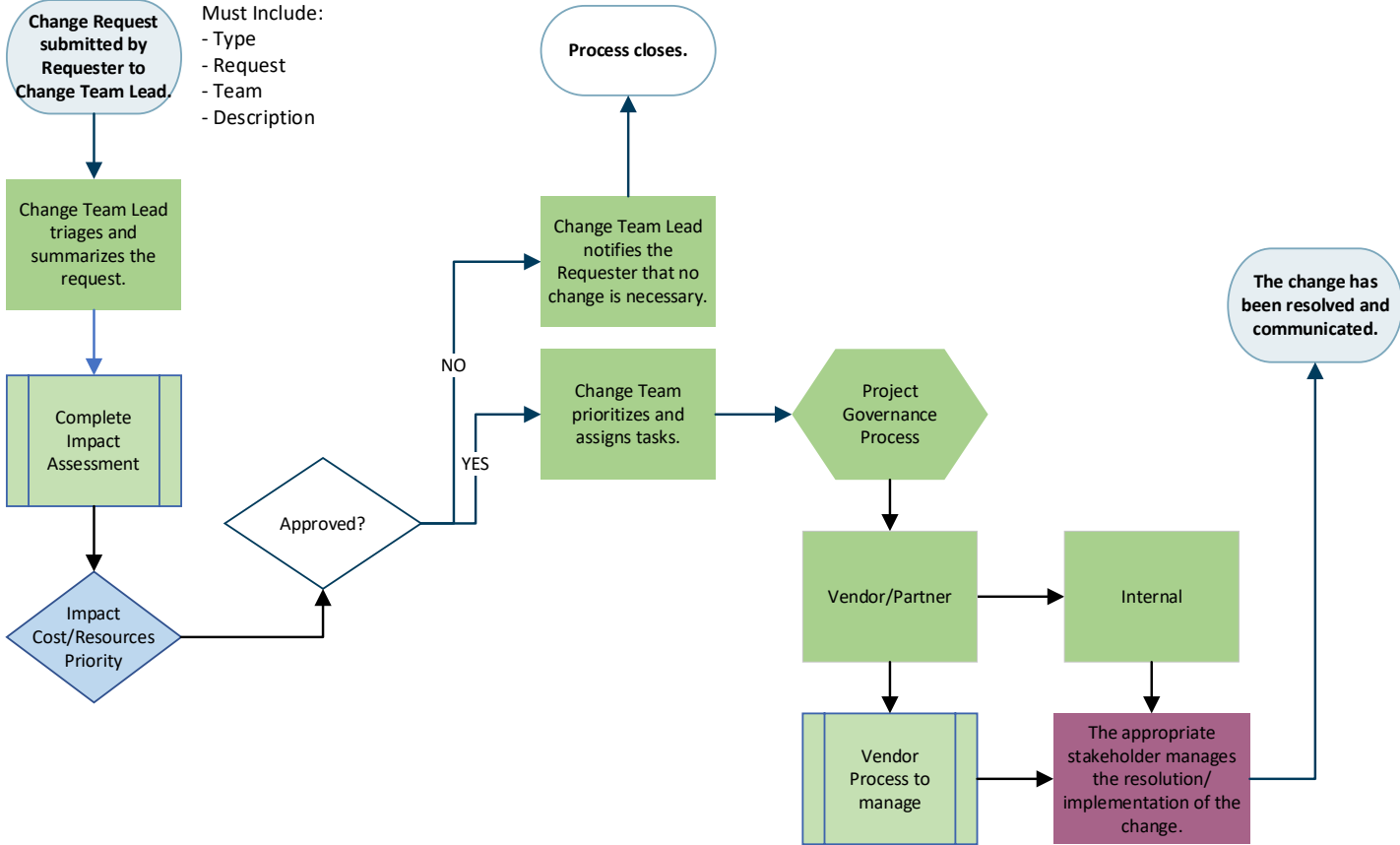
- Data

- Change Management

- Roles

CHANGE MANAGEMENT ROLES AND RESPONSIBILITIES

Role	Responsibility
Change Team	• Facilitate key functional configuration decision-making. • Obtain buy-in from business areas. • Manage customer experience and integrations with website partners. • Ensure change management initiatives are implemented (e.g., policy changes, external/member communications).
Project Change Manager	• Involve leaders by conducting leadership workshops. • Identify key stakeholders, complete a change impact assessment, and determine communication and engagement needs. • Coordinate with training delivery teams to develop/deliver training. • Engage with the Change Team.
Change Management Sponsor	• Executive team member who is accountable and responsible for the overall project.

IMPACT ASSESSMENT

1. What happens today?

2. What platform or process is used currently?

3. Type of process change? (People, Process, Policy)

4. What is future impact?

   - Staff

   - Members

   - Vendor Partners

SAMPLE WORKFLOW

Change Request submitted by Requester to Change Team Lead.

Must Include:
- Type
- Request
- Team
- Description

Change Team Lead triages and summarizes the request.

Complete Impact Assessment

Impact Cost/Resources Priority

Approved?

NO

YES

Process closes.

Change Team Lead notifies the Requester that no change is necessary.

Change Team prioritizes and assigns tasks.

Project Governance Process

Vendor/Partner

Internal

Vendor Process to manage

The appropriate stakeholder manages the resolution/ implementation of the change.

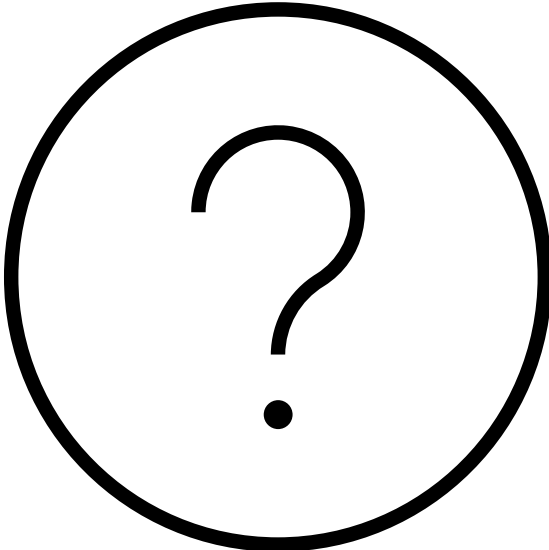**The change has been resolved and communicated.**

REINFORCEMENT

- **Plan for Adoption NOW**

- **Develop Training Plan**

  - Onboarding new staff

  - Launch Training

  - Advanced Training

  - AMS +

    - SF Trailhead, Dynamics CRM, Power BI, Automation tools
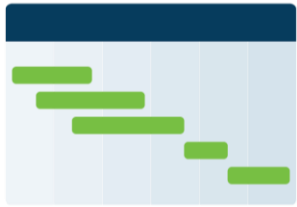
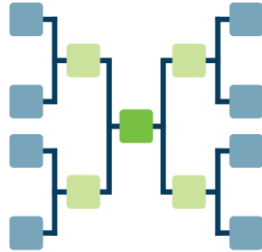- **Examine, Repeat, Adjust**

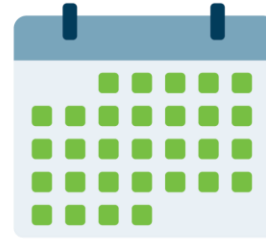# VENDORS YOU SHOULD VISIT AT AMS FEST?

WHAT'S NEXT?

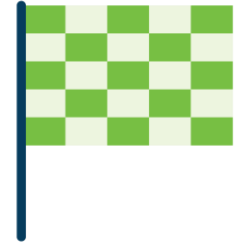| **Plan**	**Identify System**	**Schedule**	**Start**

Identify your goals and align with your association's strategy

Create a business system ecosystem map

Start small and build – this does not have to happen all at once

Get started! There's never going to be a better time to start.

RESODING

RESOURCES

- ASAE AMS Resources/ASAE Collaborate
- Consultants
- AMS Fest
- Review My AMS
- DelCor AMS Selection
- DelCor AMS Fest Resources

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