Succeed at the Speed of Business With the Right AMS

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Introduction

As technology redesigns business, business continues to drive digital innovation at warp speed. The current state-of-the-art quickly gives way to new approaches in software, hardware, and market perspectives.

A decade ago, associations had one solution for a myriad of membership activities. The association management system (AMS) was the workhorse that did the digital heavy lifting. The expectations for this piece of equipment were so great that it was built to do a little of everything. Making one platform a jack-of-all-trades produced the expected results. Multiple modules, confusing tables, and redundant fields challenged users and created output that could be inaccurate, unhelpful, and complicated to produce.

Either learn the playbook or risk losing the game.

If you are still investing more energy in running your system than serving your constituents, it's time to look at how technology has evolved. The new face of member management is streamlined, user-friendly, and smart. "Today, technology should be the hero and not the problem," observes Patrick Dorsey, Senior Vice President of Marketing at Impexium.

Whether your goal is to identify key sponsors, recruit the next generation of members, or just get home for dinner with the family, the right AMS will help you and your team find extra hours and succeed at the speed of business.

With decades of technology experience serving associations and non-profit organizations, Impexium and .orgSource have a deep understanding of the new breed of AMS and how it can advance your association's mission. This article summarizes our best advice.

Acknowledge the Digital Imperative

The question is no longer whether you will become a digital organization, it's when. Technology has written new rules for business. You either learn the playbook or risk losing the game.

Digital transformation is a term that's frequently used to describe the process of preparing organizations to succeed in this new marketplace.

"Transformation" involves putting technology at the center of business. It also requires new ways of thinking and operating that focus on the customer and align with their expectations.

Kevin Ordonez, .orgSource President and Managing Director of Digital Strategy, explains the process like this.

"A digital transformation extends beyond IT systems. It is a fundamental shift in how the organization delivers value (service or products) to its customers and members. It involves fully understanding their pain points, options, purchasing habits, and experience expectations. Addressing operational efficiencies and culture is also part of the work."

Stay Competitive

This customer-centered approach is critical in a crowded market. Competition is an unanticipated recent challenge for many associations. Technology has opened what was once protected space. Companies like Udemy, Online MedED, and Health Stream are exploring the professional development arena and eager to attract your audience. It might seem unrealistic, but your members expect you to deliver the same level of services as Amazon, Netflix, and the other internet giants whose intuitive and instantaneous attention they have grown accustomed to.

Members want their association to:

- Understand their individual preferences
- Provide services that are tailored to meet those needs
- Be responsive and available 24/7 on their preferred device
- Offer a user-friendly, engaging interface and a frictionless e-commerce experience
- Be the source for the best professional information and networking in their industry

Competition is an unanticipated recent challenge for assocations.

Awareness of how the most tech-savvy companies operate is critical. If your association can't deliver the same frictionless experiences, another provider is prepared to offer your members that value.

Maintain Leadership

The goal of digital transformation is to maintain your leadership position. It's to help you grow your relationship with members and customers in new, exciting, and cost-effective ways.

Your AMS is the cornerstone of this richer experience. It is the voice of authority on your members' demographics, interests, and preferences. But in a digital organization, the AMS is no longer the only kid on the block. It needs to play well with a new gang.

Learning management and content management systems, along with apps and office software, are all part of the technology configuration.

"Now there are so many platforms that are extremely efficient at a specialized range of tasks," Dorsey explains. "In a digital organization, the AMS integrates effectively with these best-of-breed performers."

Whether your systems are simple or complex, the AMS rules the tech stack. It must be able to transmit and receive the flow of information across the digital landscape. The AMS you choose will either make winning new friends and loyalty seamless, or it will be a barrier to growing your base of support.

Seize Opportunity

Given this pivotal role in member satisfaction, it's surprising that some organizations have been slow to abandon under-performing technology. Lack of information about developments in software, implementation, and approach is one significant stumbling block.

In many organizations, the IT department still plays a supporting role. When IT isn't a regular contributor to the leadership team, it's understandable that some CEOs are not up-to-speed on the latest technology and that digital transformation is not a priority.

Fully integrated software systems make a customer-centric approach possible.

Uninformed leaders may perceive that the benefits won't be worth the resources expended to implement a new system. There may also be reluctance to approach the board with a major funding request, especially if the rationale and ROI have not been clearly defined.

This attitude is changing as the impossibility of clinging to outdated business practices becomes apparent. CEOs are learning that while talent will always be the bottom line, even the greatest teams won't succeed in the digital marketplace without the right technology. Strategy, people, and systems need to work hand in glove.

Consider a New Approach

"Digital transformation requires a combination of attitudes and skills plus the willingness to adopt a digital mindset," advises Sherry Budziak, .orgSource Founder and CEO. "It is focused on learning and building an organization that innovates based on the changing needs and preferences of customers."

"Fully integrated software systems make this approach possible. Technology must work across platforms and provide a 360-degree view of your organization's world. Learning how to use that data to develop an intimate understanding of constituents and execute strategies based on that information is the goal."

Change isn't easy, especially when it involves implementing new tools and business processes. But if your organization is considering stepping up to a contemporary AMS and up-to-date software configurations, these are some significant benefits you can expect:

- More intelligent member service, providing greater value at reduced effort
- Better alignment between strategy and operations
- Improved collaboration across business units
- The ability to respond to members anywhere, any time, on any device
- User-friendly interfaces
- Easy access to digital information across the organization
- On-demand data and analytics with detailed information on members, products, and services
- Employees who can work smarter, faster, and more easily
- A more technology-savvy staff

These benefits have a significant impact on organizational operations and processes.

Get Smarter

Technology can open a window to your constituents' hearts and minds. Members want to interact with their association and organizations have the opportunity to learn about their preferences from every encounter.

In the past, it wasn't uncommon for associations to try to squeeze everything about a member from CE credits to logo product preferences into the AMS. Too

Technology can be a window into your constituents' hearts and minds.

often, the result was a staff overwhelmed with data entry and inaccurate, incomplete, or outdated information.

The new face of technology is designed to aggregate and summarize quantitative, qualitative, and other types of data from a variety of sources. The AMS and its companion systems achieve this level of understanding by spreading the data management among platforms that are designed for education, products, content, analytics, member community, and other specific activities. Each component of the tech stack can deliver optimal performance.

An AMS that communicates seamlessly with the other office systems makes accessing and analyzing member data to provide customized service routines easy.

Rafael Maldonado, former CIO of the National Automobile Dealers Association, explained the benefits of that group's new AMS like this.

"I am very excited about the ability to give our executives the information and intelligence that they need in order to help our members better. We appreciate the ability to simplify the whole application ecosystem, removing unbelievable complexity and bringing simplicity to the application."

Simplify

That simplicity is at the heart of maximizing digital literacy. The best tools won't deliver peak performance unless everyone can use them. Each person on your team should be able to access data to make objective decisions, create customized education, products, and services, and learn from feedback. An intuitive system that is easy to master ensures that teams can, and will, be eager to use data to do their jobs.

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"When digital thinking is woven into the fabric of business activities, the AMS transcends its function as software and becomes a library containing all the association's significant knowledge," Ordonez explains. "The key to understanding members' needs and making sound decisions resides in this data and in learning to analyze it to drive growth. Accurate data also creates the opportunity to use powerful tools like scenario planning and decision trees for objective problem-solving."

That level of engagement requires an organization-wide approach to digital strategy. Data can't be the IT department's pot of gold. Not long ago, this was a challenging proposition. Rather than being the end of the rainbow, the IT department could be a roadblock. Requests for reports and analytics might remain buried in tickets until the tech team had a break from maintaining finicky software and putting out fires.

More efficient AMS configurations put the power of data back into every employee's hands. In addition, the ability to automate many routine processes such as membership renewals, invoicing, and email campaigns, frees time and resources to focus on service. An interface that allows users to easily move back and forth from the AMS to other desktop applications like Outlook and Teams is an added convenience.

Cynthia Moreno Tuohy, the Executive Director at NAADAC, the Association for Addiction Professionals, described the difference a more efficient AMS can make, "I like the fact that by using our new AMS versus our previous system, we will be able to reduce staff's workload. As a result, NAADAC's staff will be happy and feel more capable and competent in serving our 51,000 members.

Build for the Future

It's difficult to know what your system needs will be five years from now, but If you invest in an AMS designed for today's members, the product you choose should offer the flexibility to grow into the future with you. You've probably experienced the typical steps in a selection project several times. Establishing a timeline, budgeting, delegating responsibilities, and developing a training process may already be second nature.

"The technology environment is very different today than it was a decade ago," Dorsey advises. "You aren't just shopping for a system; you're securing the tools for the automation, personalization, and data-informed decision-making that will help you work smarter not harder."

The following additional strategies will ensure that a new system delivers on expectations and grows along with your organization.

Start Strong

"Understand the desired outcomes and lay the groundwork for a successful project, by communicating a clear rationale and vision across the organization," says Ordonez. "Don't limit engagement to leaders, get everyone from the most junior staffers to management on board. Pick an implementation team of respected stakeholders from each department. Select representatives whose enthusiasm and expertise make them good ambassadors."

Identify your MVP and select a platform that allows for adjustments.

Remember simplicity is the key. "Don't boil the ocean," Ordonez advises. "Identify your minimum viable product, or the baseline configuration that will deliver the greatest value for the least effort." The objective is to select a flexible platform that allows for adjustments as you learn and grow.

Define key performance indicators, or benchmarks, to measure progress against goals.

Tell Stories

Develop user stories to clearly explain how processes should function. These descriptions outline the steps staff and members must take to achieve a task or outcome. For example, the process for renewing members is to notify them by email or text to confirm their rate and payment method. Defining these journeys helps everyone involved to understand system goals.

Ask Questions

Ask what your constituents want and need and develop requirements for user experiences as well as technical parameters.

Be prepared to abandon outdated business practices for digital routines that fully utilize the capability of the software. If there are challenges, dig below the symptoms to uncover the root cause of problems. And change or update activities that are inhibiting productivity.

Open possibilities for innovation by asking "why" and "what if" instead of "how." Allow everyone to contribute ideas. You may uncover talent and skills on your team that you weren't previously aware of.

Evaluate Fit

Along with meeting the requirements in your request for proposal (RFP), evaluate vendors for the right fit with your size, culture, and values.

Focus on both the software and the vendor. Look for a technology partner who has:
- Proven quality and successes
- Solid project management experience
- An understanding of your organization
- Chemistry with your staff and culture
- Gained your trust

Begin a Partnership

The software is important, but the people make or break the relationship. "Choose a company that wants to be a partner in your success," Ordonez advises. "Find a vendor who is looking beyond the sale and will keep the door opened to address future challenges or opportunities."

"Go live is just the beginning of the relationship," says Dorsey. "Ongoing staff training is one way the association continues. The right vendor also wants to help shape your digital future. Just as you are listening to your members, savvy software leaders listen to their customers and evaluate what is changing in their environment.

"Technology is constantly evolving, and our job is to make sure you grow along with our platform and the marketplace. The goal is to help you delight your members and succeed at the speed of business."

Meet Impexium

At Impexium, we recognize an Association Management Solution (AMS) needs to be as flexible as its customers are unique. Our approach to membership management is informed by real-world successes. Impexium relies on our customers, prospects, and our own insights, gathered from more than 2,000 implementation experiences, to continuously refine our membership management platform to deliver the outcomes necessary to address major organizational goals — today and in the future.

- We are driven to change your mind about what is possible
- We work to make your work more productive and enjoyable

- We believe there is power in simplicity

At Impexium, we recognize every member is a customer, but not every customer is a member. This vision creates a great opportunity for associations to leverage Impexium's smarter, simpler membership management platform to personally connect with individuals and organizations and build a single, cohesive experience with their brand and community (and drive new revenue opportunities).

The Impexium Business Advantage

Impexium believes AMS technology is no longer simply a productivity tool to perform tasks faster and cheaper but should transform the way an association conducts business. Managing the business of your association should be simple and intuitive — allowing staff and members to work with the latest technology and conveniences expected from the for-profit sector.

Impexium's platform allows trade associations, professional societies, and non-profits of all sizes to:

- Serve members more intelligently and profitably
- Strengthen alignment between strategies and operations
- Reduce costs through increased flexibility and gain ROI faster
- Create value for key relationships — members, customers, partners, prospects, and staff

Everything we do is laser-focused on streamlining work for our customers, so they can focus on their mission and members.

[Smarter, Simpler Membership Management - Impexium](#)

Meet .orgCompanies

.orgCompanies is dedicated to supporting associations as they undertake transformational change. We offer strategic guidance, practical solutions, and access to a vibrant network of executives and education to strengthen associations and the value they provide. Two related organizations form the .orgCompanies brand:

- **.orgSource** provides association leadership teams with strategies and data-driven solutions that reflect our deep understanding of the challenges that associations face and our knowledge about approaches to overcoming them. Our success spans fifteen years and represents more than 200 client engagements. From developing an integrated strategic plan to preparing your association for a digital future and supporting the implementation of your important projects and initiatives, .orgSource's experienced advisors are ready to serve your needs. [.orgSource](#)

- **.orgCommunity** connects members to a vibrant network of executives, entrepreneurs, and strategic partners dedicated to shaping the future of associations. Members have access to collaborative events, small group learning opportunities, and peer-to-peer counsel with trusted allies, mentors, and friends who share a passion for excellence. [.orgCommunity](#)

Discover our philosophy of Association 4.0 leadership in our books: *Positioning for Success in an Era of Disruption* and *An Entrepreneurial Approach to Risk, Courage, and Transformation*. Let us share .orgCompanies' passion for designing premium solutions for associations with you.