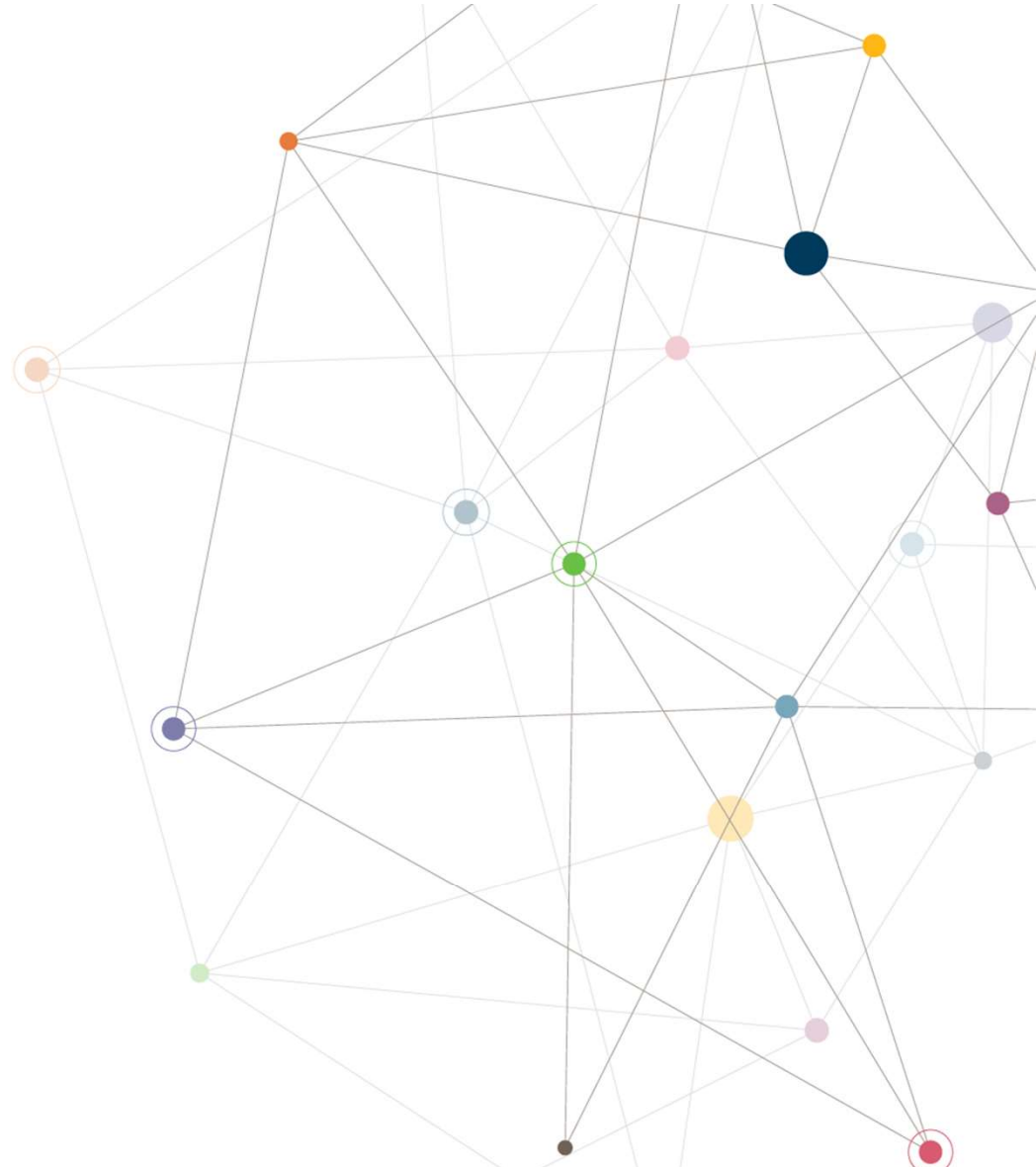




# AMS BOOTCAMP

---

AMS Fest  
June 2023



© DelCor Technology Solutions, Inc.

# AGENDA

---

## Hour 1: 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.)

## Hour 2: System Selection Details

- BREAK
- 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?

## Hour 3: Manage the Change for People



## EXERCISE: OUR MAIN CONCERN IS...

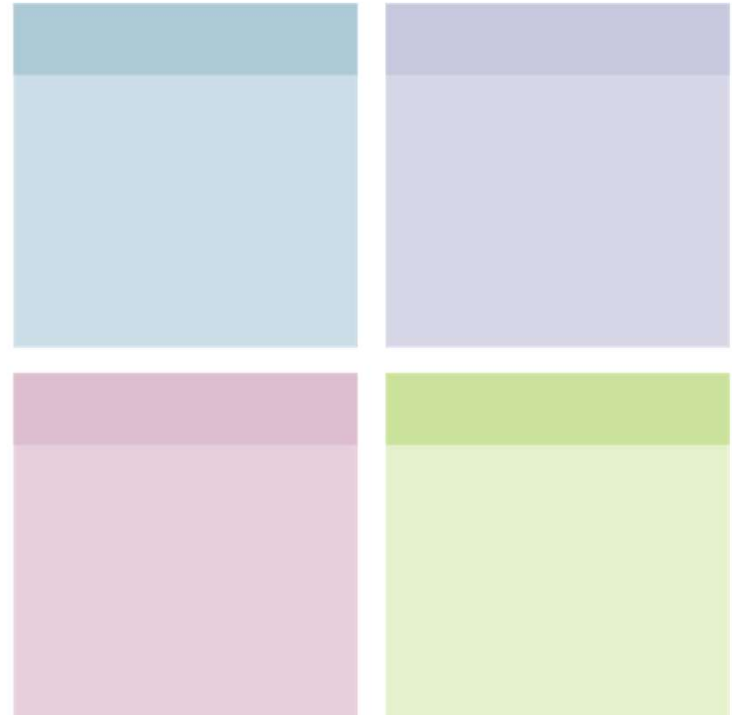
---

### WORD WALL (Post-Its)

What are your system concerns?

What are your vendor concerns?

I want to make sure we cover....



# INTRODUCTIONS: TECHNOLOGY GUIDES

---



**Gretchen Steenstra**  
**Kitten Fosterer**



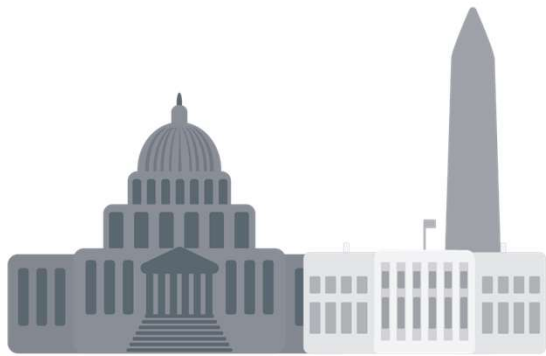
**Norma Castrejon**  
**Hedgehog Friend**



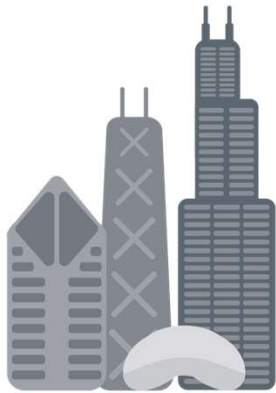
# DELCOR SNAPSHOT

---

DC OFFICE:  
SILVER SPRING, MD



MIDWEST OFFICE:  
CHICAGO, IL



501(C)  
COMMITMENT

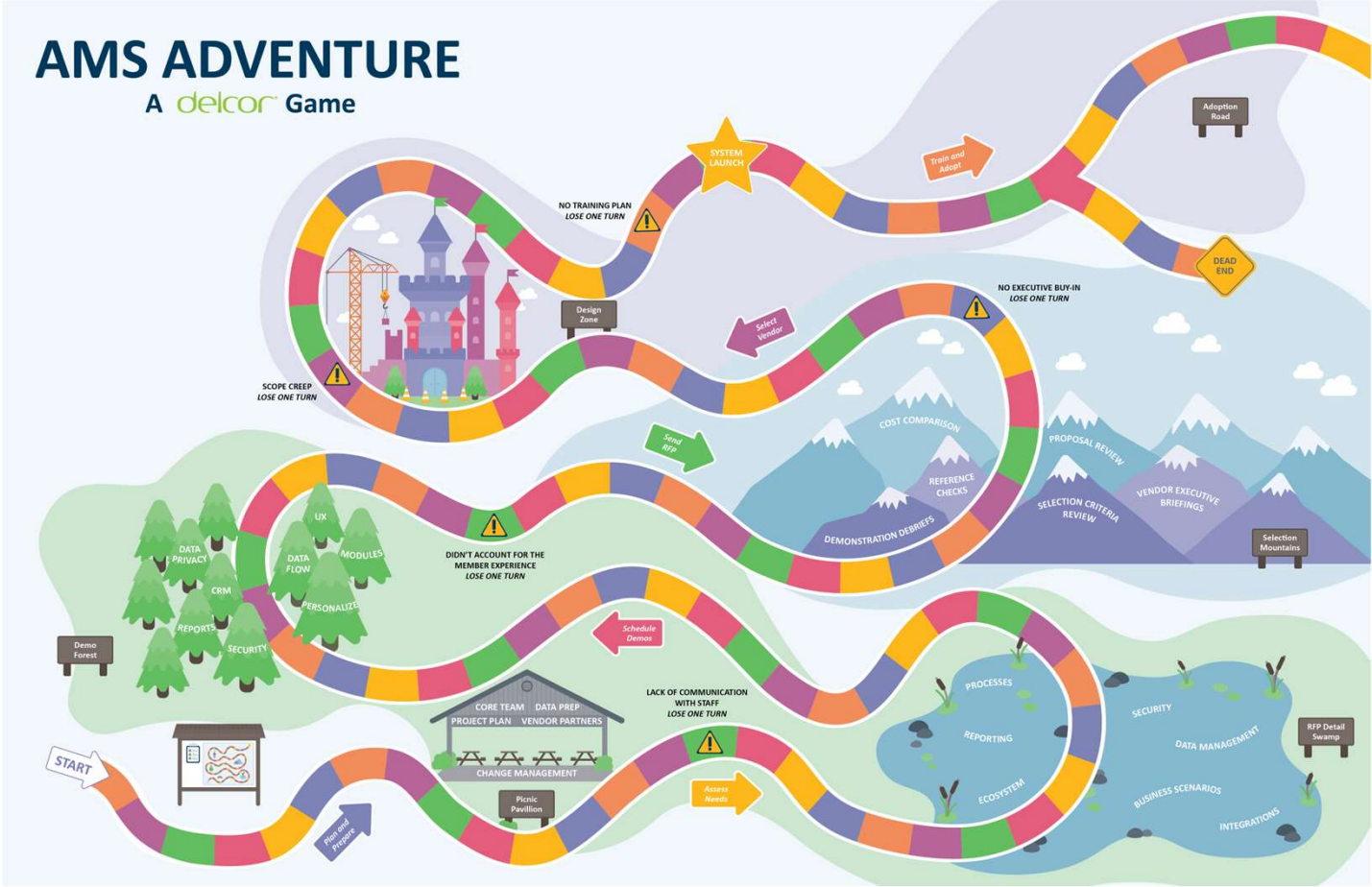
35+ YEARS IN  
BUSINESS

90+ FULL-TIME  
STAFF

40+ DIFFERENT  
CERTIFICATIONS

VENDOR-AGNOSTIC  
CONSULTING

# DELCOR AMS ADVENTURE



# 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

# POLL

---

How long should the selection take?

- a) 1-3 months
- b) 3-6 months
- c) 6-9 months
- d) 12+ months





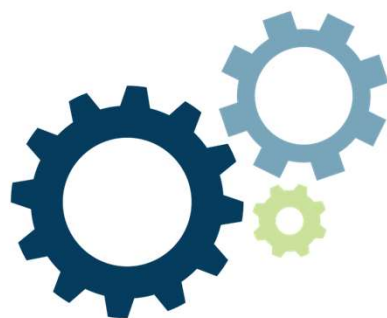
# SYSTEM SELECTION PHASES



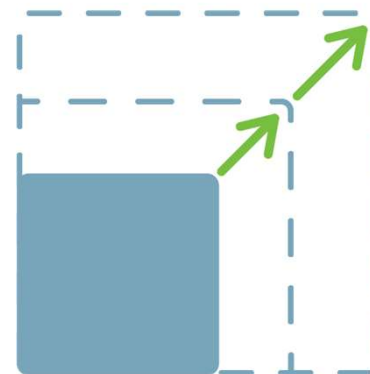
# AMS OVERVIEW

	A	B
	✓	✓
	✓	—
	—	✓
	✓	✓

Selection Process



Tools



Scaling

# GET SET

## Get Set

- Project Scope
- Team
- Plan



## Docs and Demos

- Requirements
- Vendors
- Demos



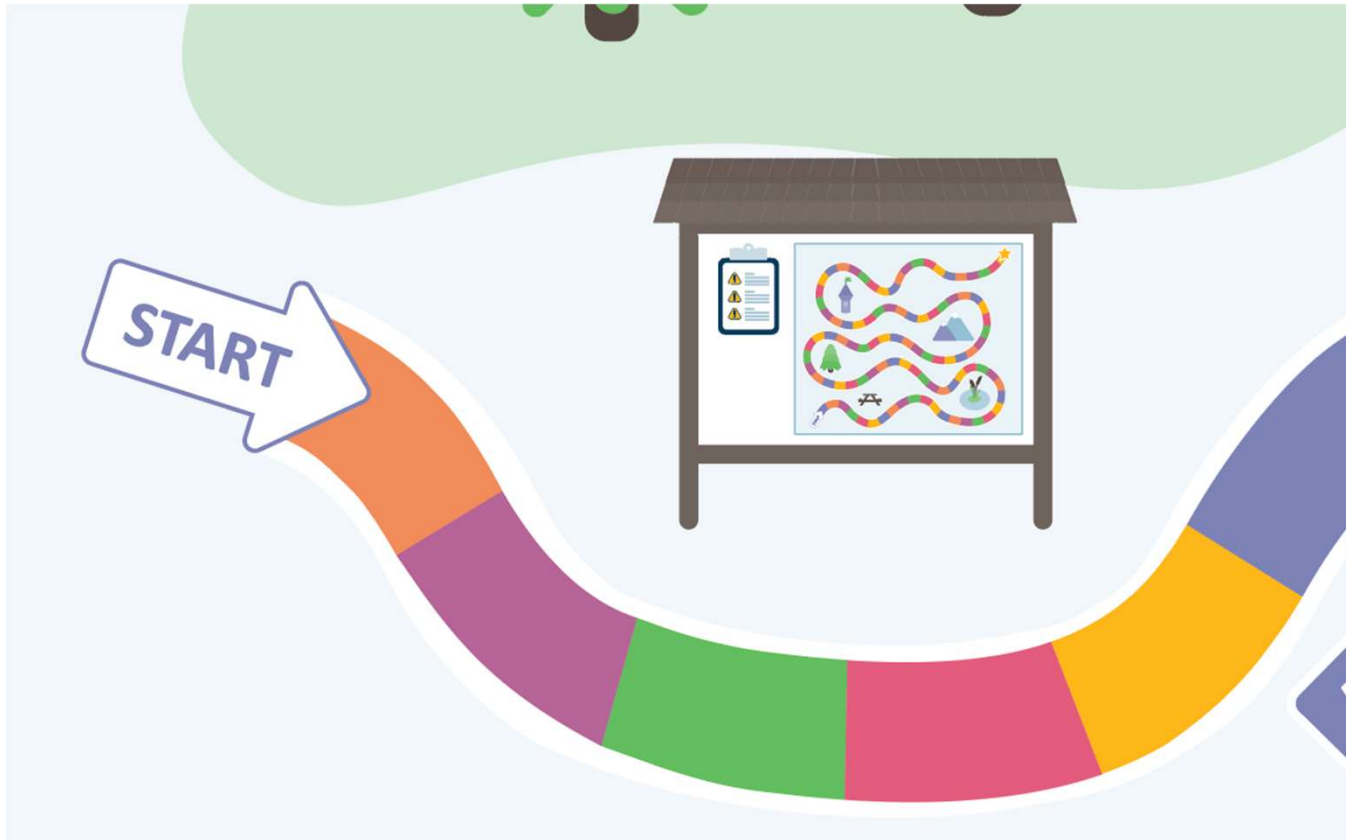
## Proposal & Selection

- RFP
- Proposal
- References



## SECTION BREAK - "START"

---



# CORE TEAM

---

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

- Decision Maker
- Business Owners
- Finance
- Marketing/Communication
- Customer Service



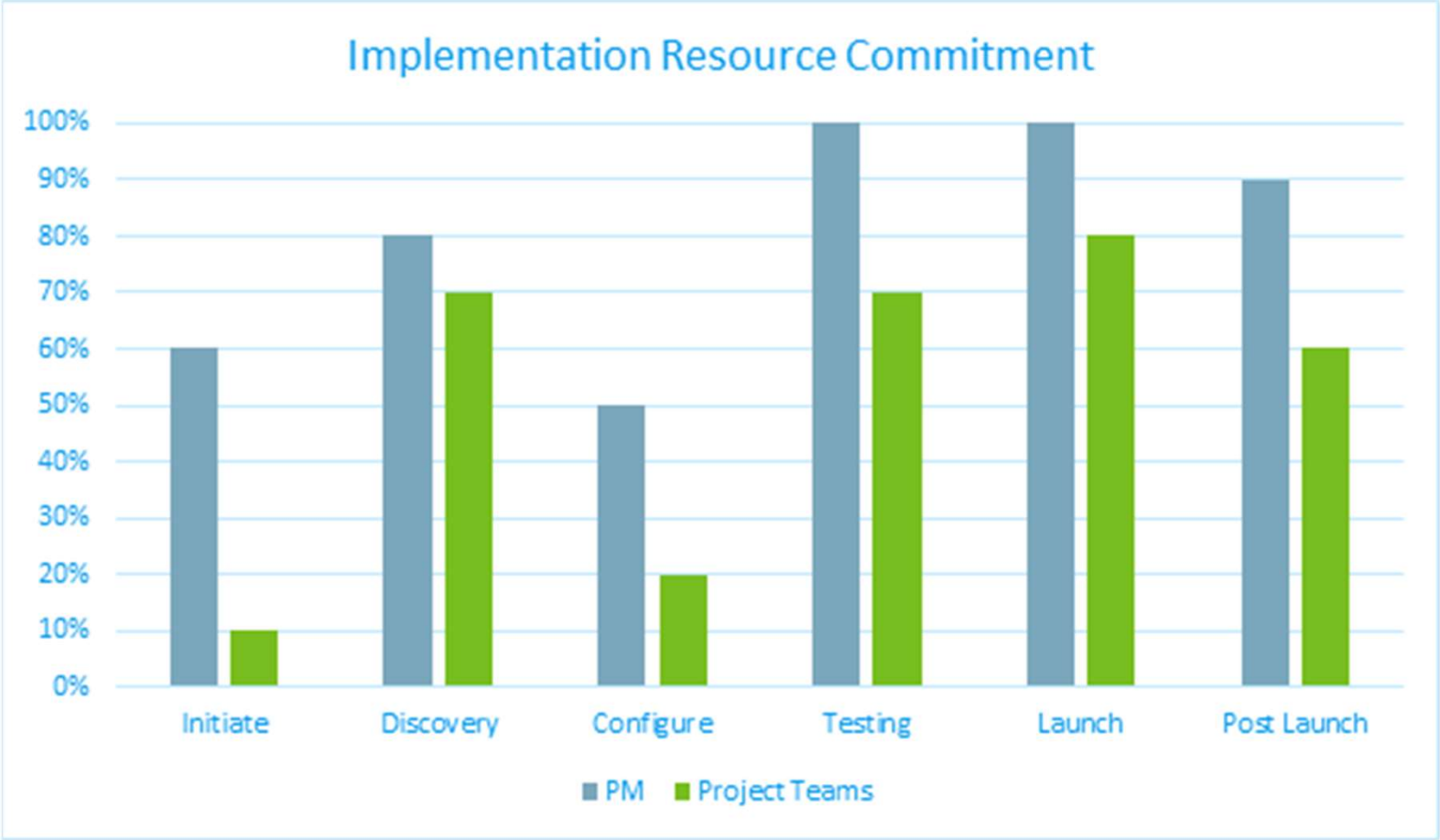
# ROLES AND RESOURCES

---

- Identify staff roles
- What resources will be needed?
  - Time needed
  - Duration
  - Communication
- Staff roles
  - Backfill position
  - Longer hours
  - Temp



# ROLES AND RESOURCES: NEED ADVICE FROM DELCOR



# COMMUNICATION: RACI CAN MAKE OR BREAK

---

## Responsible

- Carries out the process or task assignment
- Responsible to get the job done

## Accountable

- Accountable for the process or task being completed appropriately
- Responsible person(s) are accountable to this person

## Consulted

- Not directly involved with carrying out the task, but are consulted
- May be a stakeholder or a subject matter expert

## Informed

- 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

# 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

---

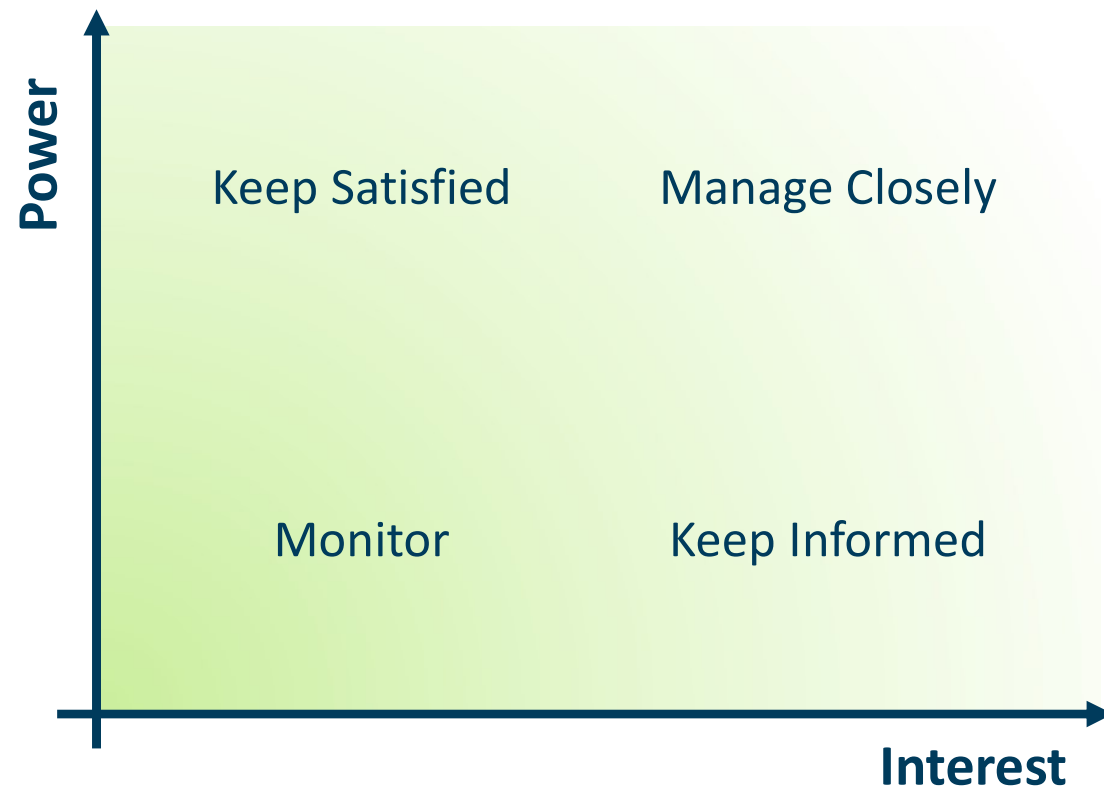
- Internal
  - Updates of milestones and progress
  - Project Team, Staff, Leadership/Board
- External
  - Updates to leaders and members
  - 'Coming soon – new registration process'
  - Ask members to provide feedback



# COMMUNICATION: STAKEHOLDER ANALYSIS

---

## Dry Run for Selection – Critical During Implementation



# 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?**



## CHARTER SECTIONS (SEE CHARTER ATTACHMENT)

---

- Purpose/Objectives
- Alignment with Strategic Plan
- Acceptance criteria
- In/out of scope
- Deliverables
- Resources
- Budget

# KNOW YOUR AUDIENCE

---

- Organization Staff Size
- Tech Readiness
- Staff “Rank” & Level of Responsibility for System
  - Position: Admin to CEO
  - Position: No input to Decision Maker





# DISCOVERY TRAILHEAD

---



# DOCS AND DEMOS

## Get Set

- Project Scope
- Team
- Plan



## Docs and Demos

- Requirements
- Vendors
- Demos



## Proposal & Selection

- RFP
- Proposal
- References



## SECTION BREAK: RFP SWAMP



# 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



# WHERE DO YOU FIND REQUIREMENTS?

---

A dark blue rectangular box with a network diagram pattern of white dots and lines in the background.

**Standard Operating  
Procedures (SOP)**

A teal rectangular box with a network diagram pattern of white dots and lines in the background.


**Tribal  
Knowledge**

A light blue rectangular box with a network diagram pattern of white dots and lines in the background.

**Organizational  
Goals**

A light purple rectangular box with a network diagram pattern of white dots and lines in the background.

**Member/Customer  
Needs and Processes**

A pink rectangular box with a network diagram pattern of white dots and lines in the background.

**Staff Needs and  
Processes**

# TELL YOUR STORY

---

Find the best way to tell your story, then break it down into requirements that are:

- Specific
- Verifiable
- Testable



# BUILD A BUSINESS CASE

---

- Business Area Focus (1 goal for each business area)
- Who is your audience? (members, registrants)

Audience/Department	Goal (WHAT)	Objectives (WHY)

# 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	



# 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.

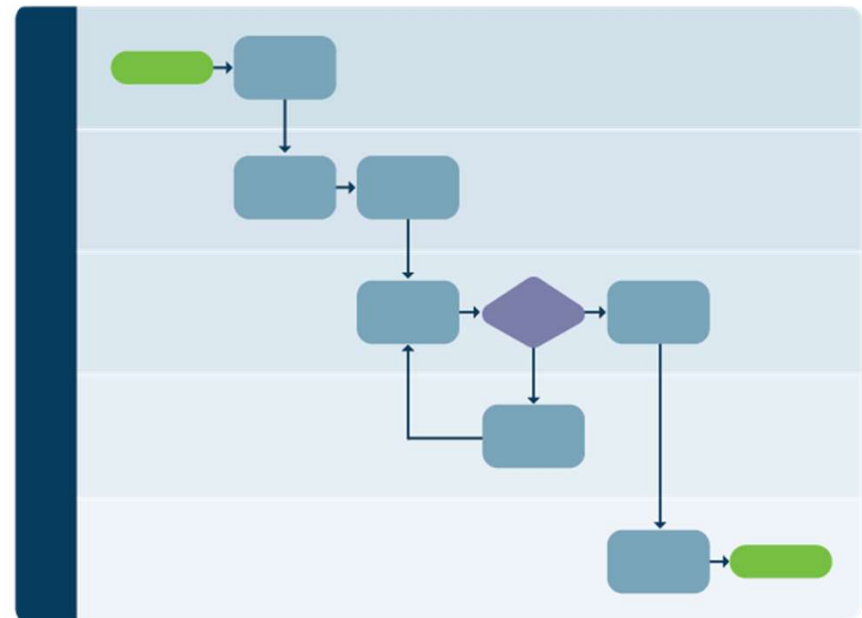
# BUSINESS AND PROCESSES: JUST ENOUGH DETAIL

---

BUSINESS processes

VS

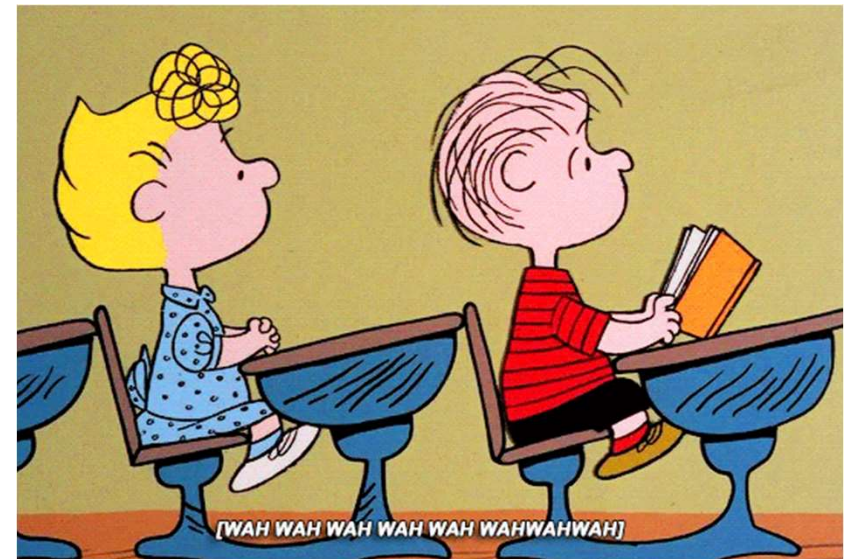
business PROCESSES



## REQUIREMENTS: TELL YOUR NEIGHBOR

---

- Can you explain your business rule to a stranger?
- 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:

- Introduce the project
- Background of your organization
- Project goals and scope
- Business objectives
- Overview of functional areas
- Specific questions and needs (e.g., requirement)
- Instructions to vendors

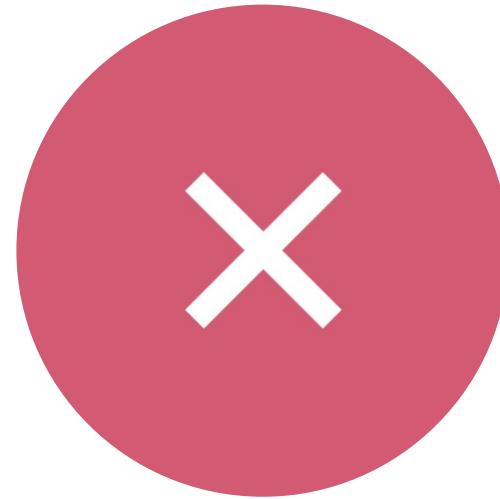


## RELEASE THE RFP?

---



TRUE



FALSE

# POLL

---

How many vendors should I consider?

- a) 8
- b) 2
- c) 5
- d) 3



# 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 needs
- Share general budget range
- Share staff size and resources
- Use your RFP as a guide



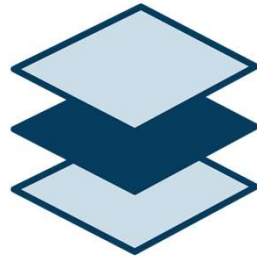
# SELECTION CRITERIA: HIGHLIGHTS

---



## Functional Requirements

Customer-Facing  
e-Commerce  
Exports



## Platform and Services

Integrations  
Partners



## Cost Requirements

Licensing  
Implementation



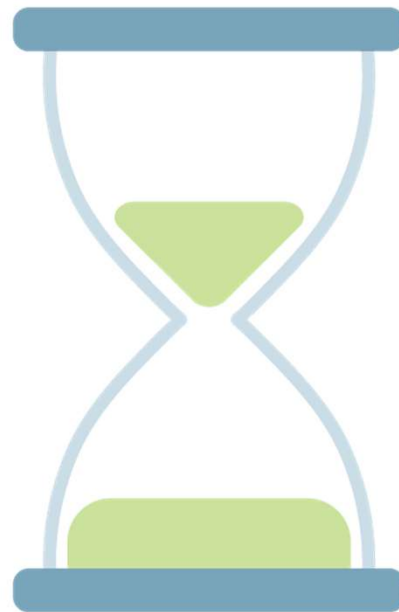
## Vendor Requirements





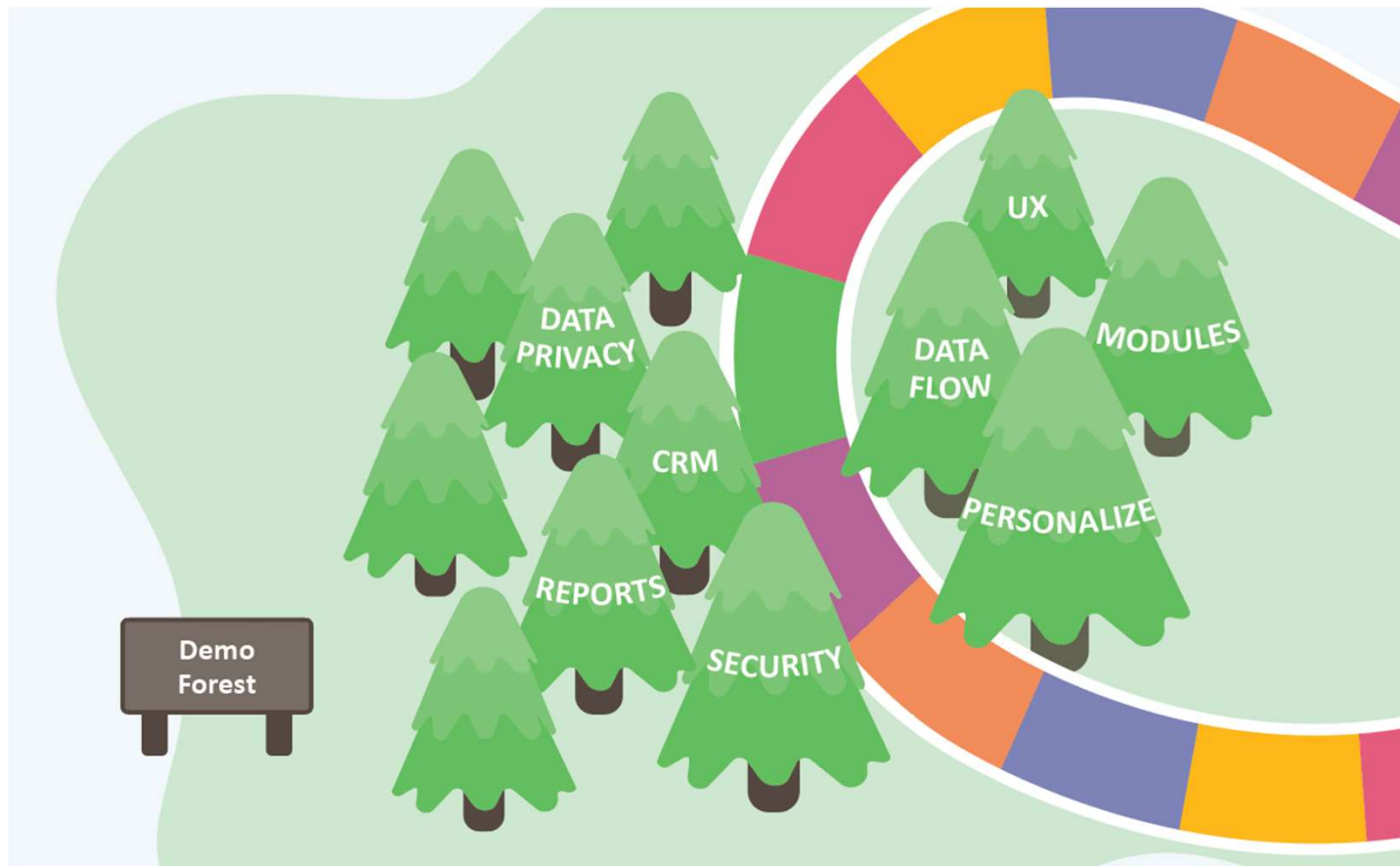
# 15 MIN...GO!

---



## SECTION BREAK: DEMO FOREST

---



## DEMOS: PREPARATION

---

- Provide a general agenda and outline
- Develop business scenarios (tell the story of a set of requirements)
  - Describe a complex process that is critical to your project (e.g., bulk dues, group registration, chapter management)
- Provide a sample of an important event (registration form)
- Provide a draft RFP for additional reference
- Decide the process to evaluate vendors



# DEMOS: TOPICS

---

- Intro
- General Navigation
- Customer Management/Experience
- Membership
- Finance
- Query/Reports
- IT/Platform



## DEMOS: OTHER CONSIDERATIONS

---

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

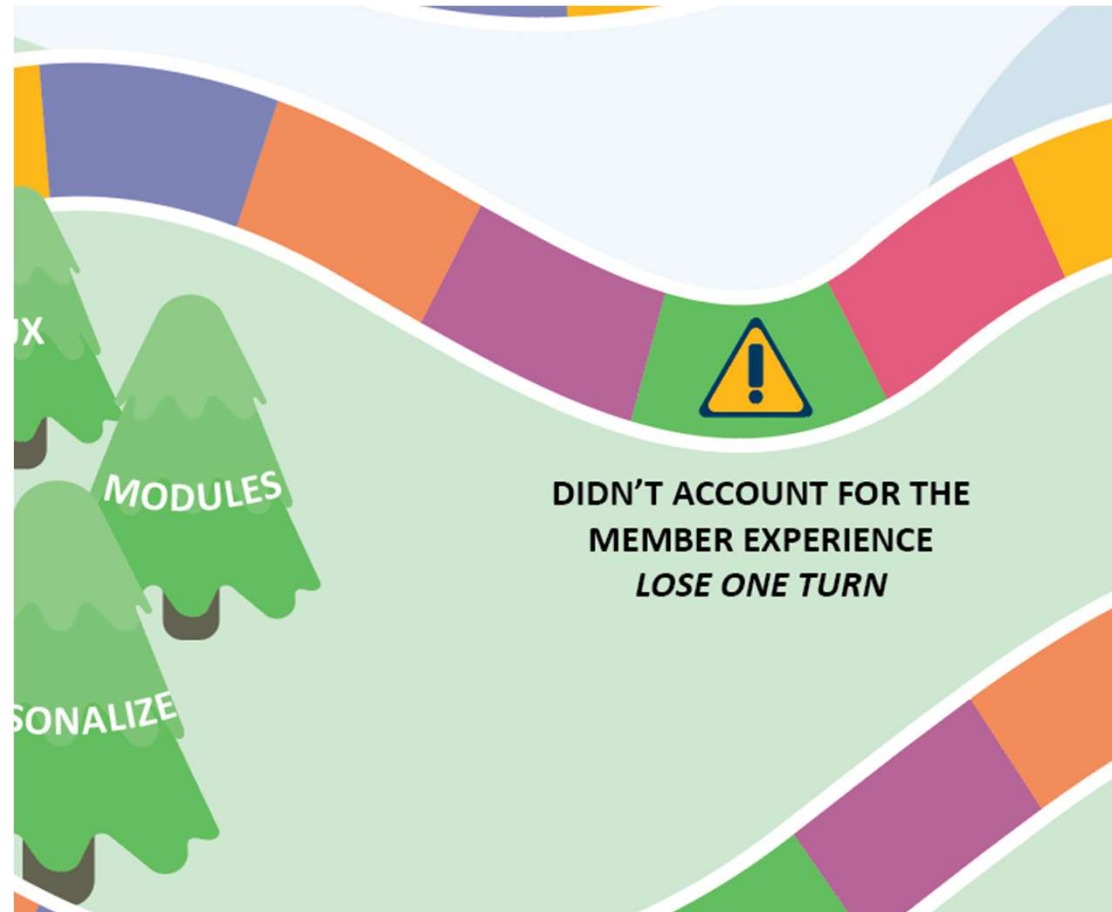
- Meetings/Events
- Education/Certification
- Publications



# 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

---

- **Take Time to Test:** Vendors to join 15-30 minutes early access to the virtual environment
- **Record:** Will vendors allow you to record and share?
- **Ground Rules:**
  - Identify yourself as the person responsible for managing the schedule and that you will give a 10 minutes' notice before a section's ending time
  - Once the demo begins, staff will mute and turn off their video so their focus will be on the demonstration
- **Chat:** Use internal chat feature to identify questions for the vendor





## SEND RFP - REFERENCE

---



# 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

## Debrief Immediately

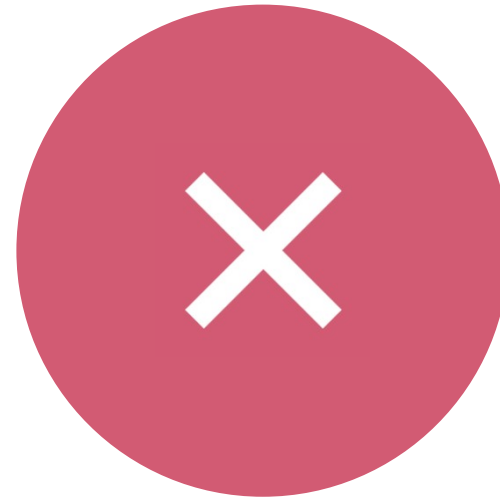
- Score the vendor and submit right after the demo
- Identify follow-up
- Decide to keep or reject (remember that this is a SELECTION)

## SHOULD I INCLUDE VENDOR FEEDBACK THAT'S INCOMPLETE?

---



YES



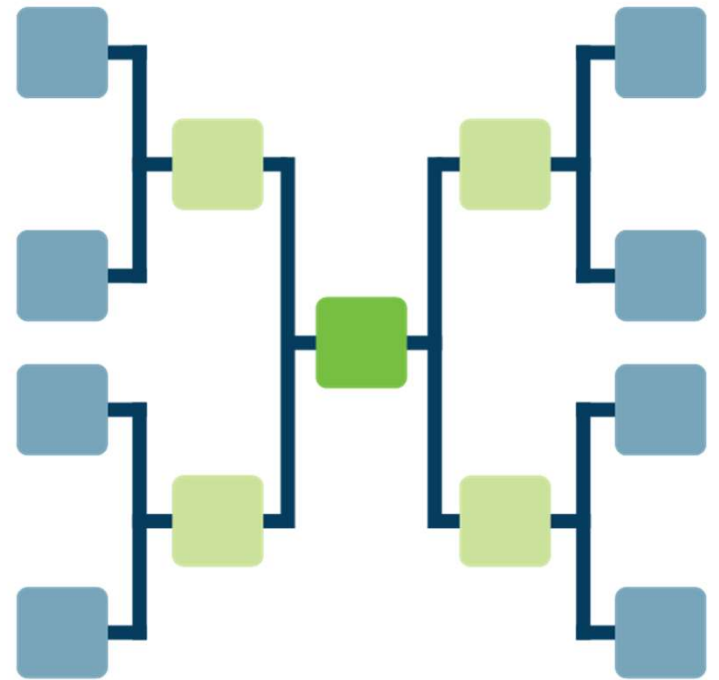
NO

## 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.



# 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



# 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

	A	B
	✓	✓
	✓	—
	—	✓
	✓	✓



# HANDOUT: SCORING SHEET

A	B	C	D	E
	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


---



# 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

	A	B
	✓	✓
	✓	—
	—	✓
	✓	✓

# DECISION TIME!

---



# CONTRACT (MSA AND SOW)

## Legal

- Back up
- Escrow
- IP
- Business Continuity
- Disaster Recovery



## Work Together

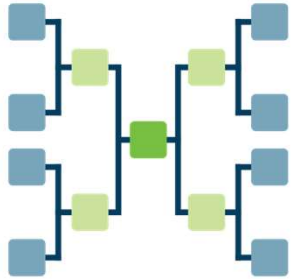
- Project Management
- Fees/Payments
- Testing
- Acceptance
- Exit Strategy



# WHAT'S NEXT?

---

## Partner



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

## Plan



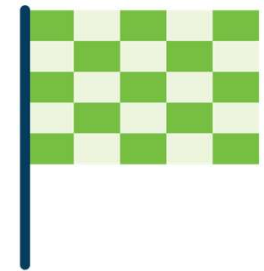
Review staff calendars and plan for the selection process.

## Schedule



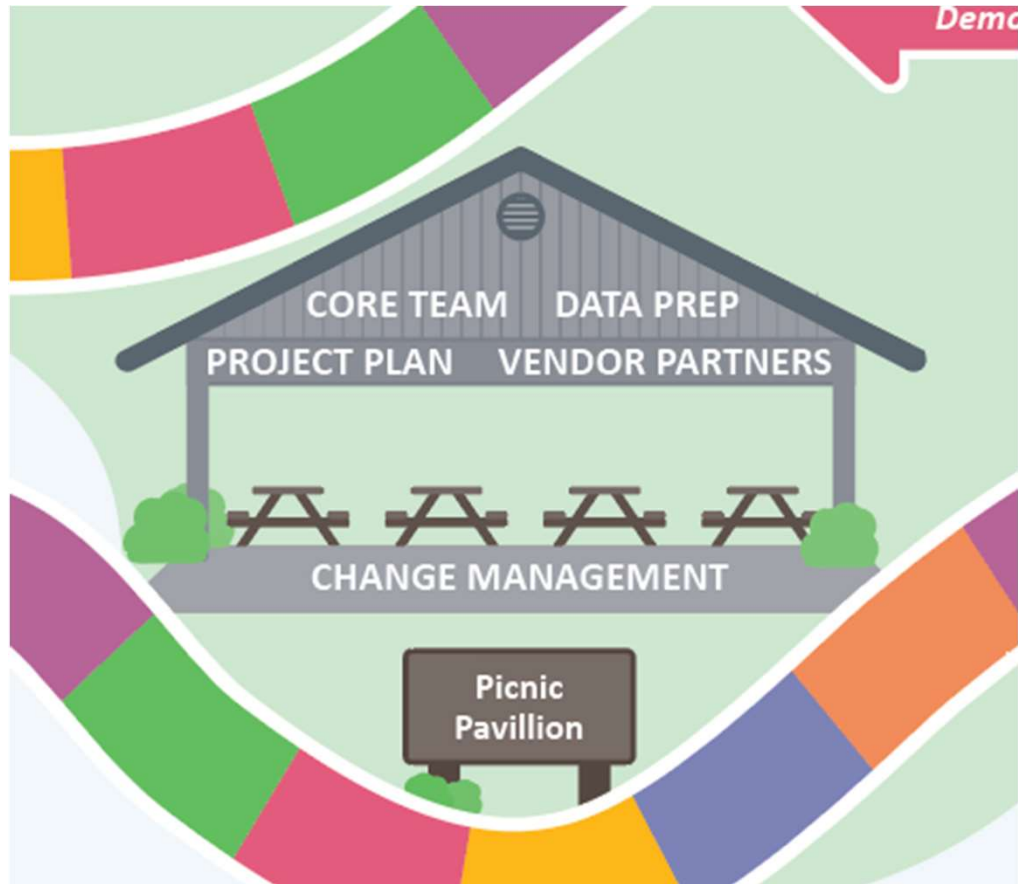
Schedule the project kickoff and discovery meetings.

## Start



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

# IMPLEMENTATION PLANNING

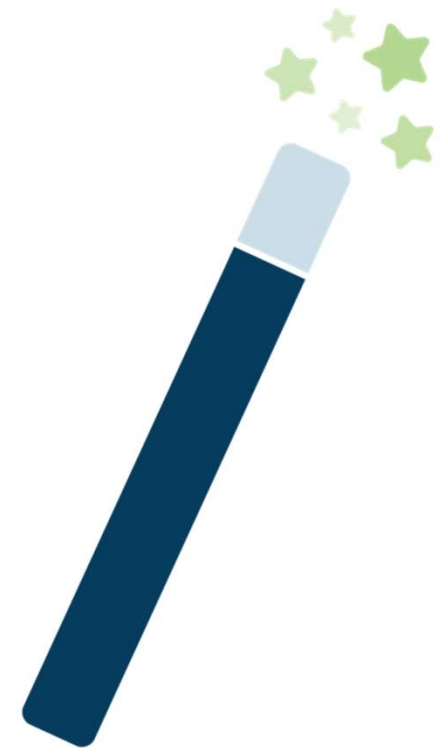




# REMEMBER... THERE'S NO MAGIC WAND!

---

- 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



## GET READY

---

Reset the Core Team

Create Data Roadmap

Create a Project Plan

Involve your Vendor Partners



# LOSE A TURN!

---



# ADOPTION CASTLE



# WHAT AREAS CAN YOU ADDRESS RIGHT NOW?

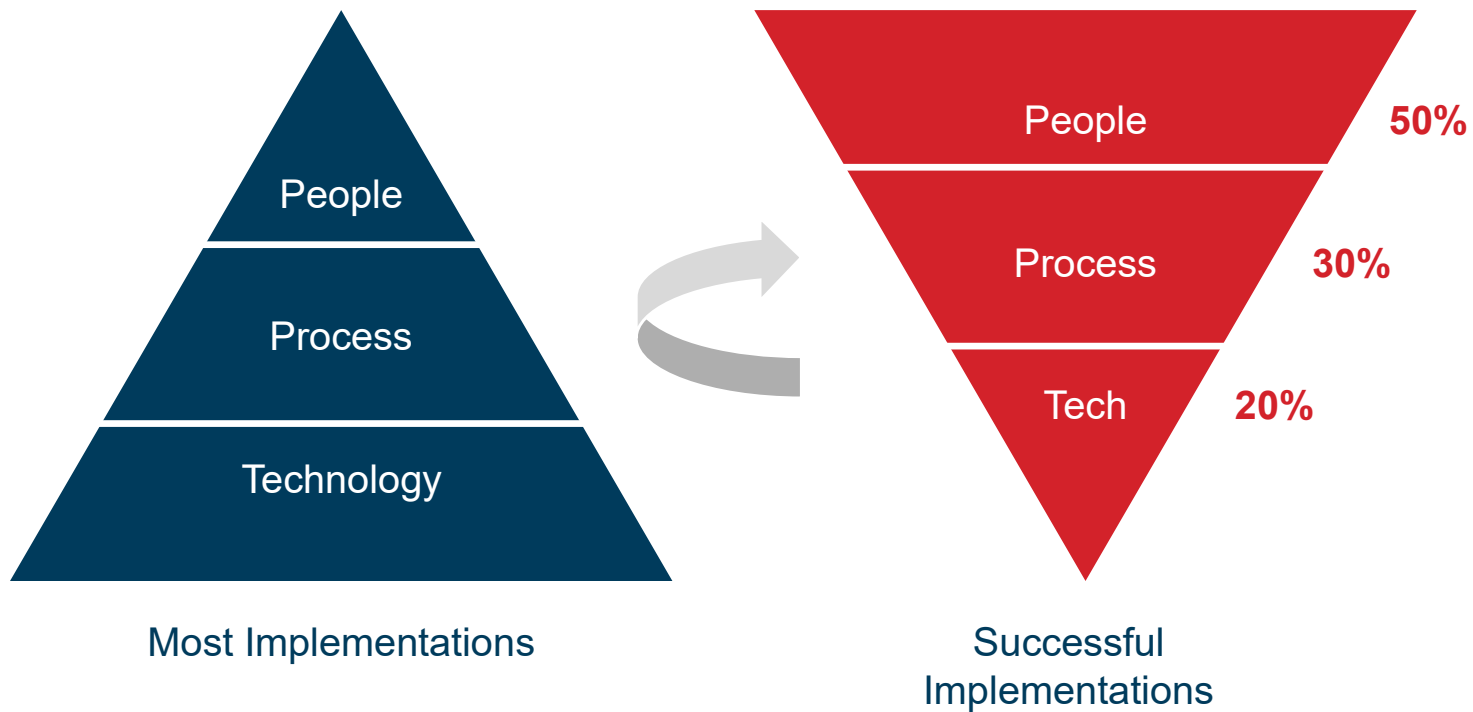
---

- Business Processes
- Ecosystem
- Data
- Change Management
- Roles



# WHY DO BIG TECH IMPLEMENTATIONS FAIL?

Source: ISM Survey – US  
(CRM Implementations)



# Main Reasons Why Big Technology Projects Fail – & Why Many Companies Should Just Never Do Them (forbes.com)

# Main Reasons Why Big Technology Projects Fail – & Why Many Companies Should Just Never Do Them (forbes.com)

## 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



# CHANGE MANAGEMENT: PEOPLE

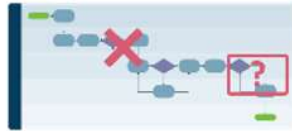
---

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



# ENGAGEMENT

---

- Change Team
- Vendor/Partners



# CHANGE MANAGEMENT ROLES AND RESPONSIBILITIES

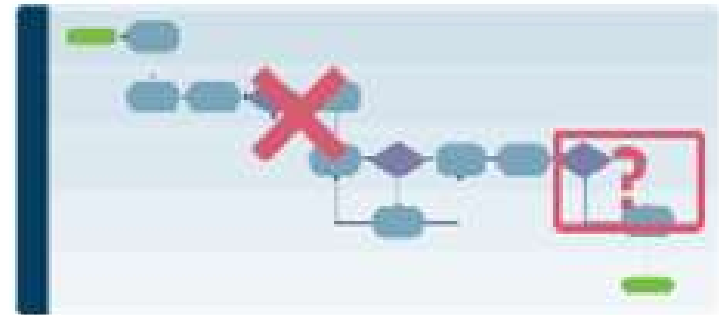
Role	Responsibility
Change Team	<ul style="list-style-type: none"><li>• Facilitate key functional configuration decision-making.</li><li>• Obtain buy-in from business areas.</li><li>• Manage customer experience and integrations with website partners.</li><li>• Ensure change management initiatives are implemented (e.g., policy changes, external/member communications).</li></ul>
Project Change Manager	<ul style="list-style-type: none"><li>• Involve leaders by conducting leadership workshops.</li><li>• Identify key stakeholders, complete a change impact assessment, and determine communication and engagement needs.</li><li>• Coordinate with training delivery teams to develop/deliver training.</li><li>• Engage with the Change Team.</li></ul>
Change Management Sponsor	<ul style="list-style-type: none"><li>• Executive team member who is accountable and responsible for the overall project.</li></ul>



# UNDERSTANDING

---

- The way you work
- Trade Offs



# IDENTIFY AREAS OF POTENTIAL CHANGE

---

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

Identify:

- Difficult requirements
- Areas that required customization
- Processes that need the most customer service/TLC
- Processes that support the most revenue
- Processes that can be automated

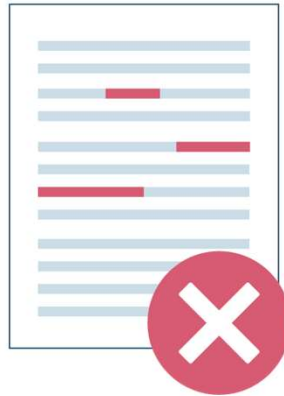
# DATA: A SOURCE OF CHANGE

---

What are you REALLY doing with your data?

What is the relationship between data and process?

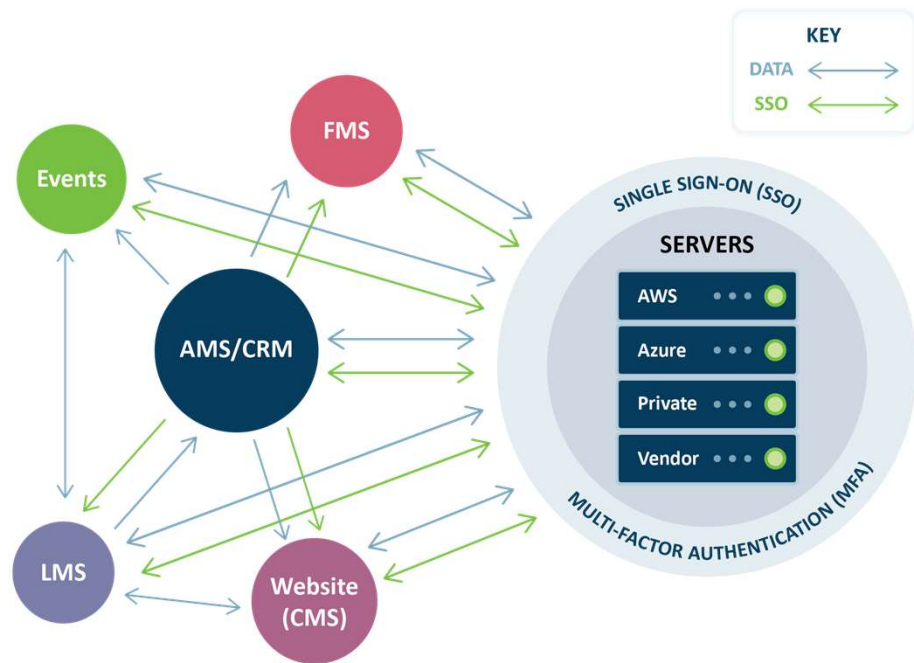
- Data conversion
- Report inventory
- Data standards
- Data integration



## CONNECTIONS TO CONSIDER FOR YOUR BUSINESS SYSTEM

## To support YOUR ecosystem, what are a few areas to consider?

- Technical Considerations
  - Integration
  - Data
- System Owners
  - Business
  - Technical
- System Updates and Coordination





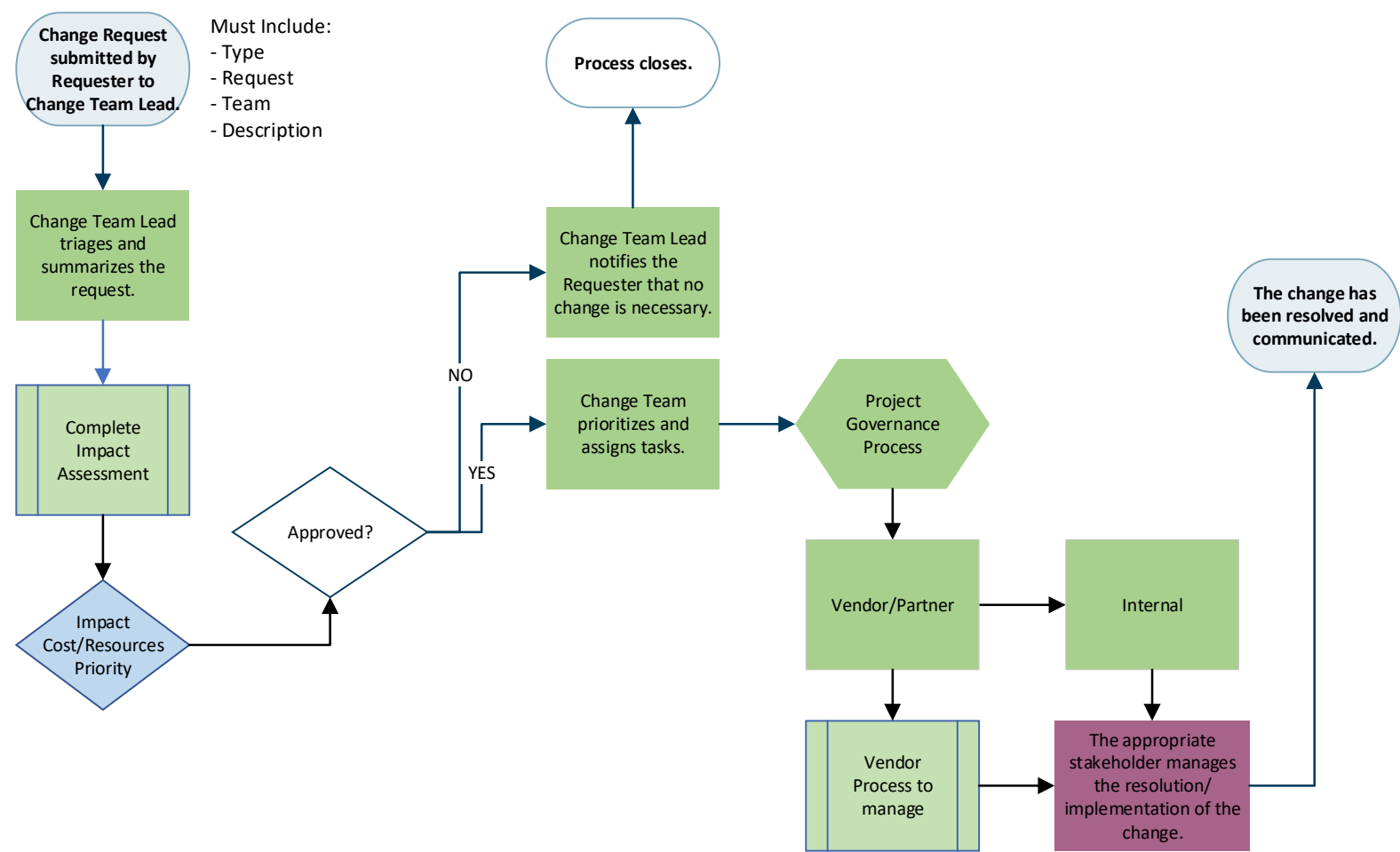
# PREPARATION

---

- Data Inventory
- Change Workflow



# SAMPLE WORKFLOW



# 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



## ANALYSIS: RANK WITH LIMITED RESOURCES

---

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

# ADOPTION

---

- System Change -> Work Change
- Onboarding
- Training



# 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

# REINFORCEMENT

---

- Regular Training
- Examine, Repeat, Adjust





# WHAT'S NEXT?

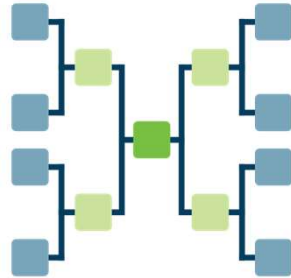
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## Plan



Identify your goals and align with your association's strategy

## Identify System



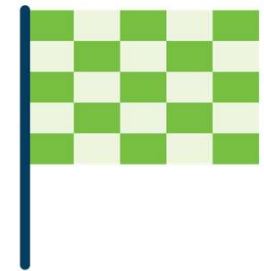
Create a business system ecosystem map

## Schedule



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

## Start



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

# RESOURCES

---

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