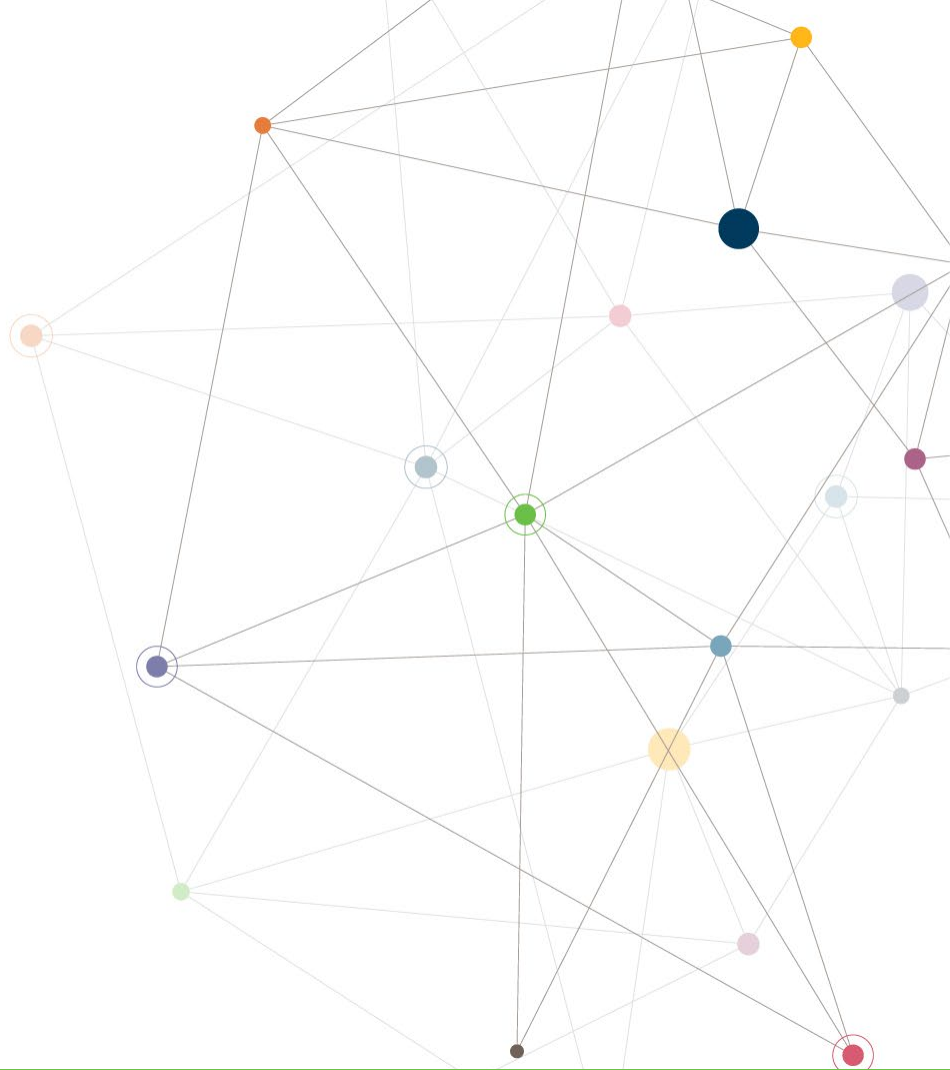# AMS BOOTCAMP

AMS Fest

June 2022

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 RFP's, compare prices, and select a vendor?

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

Hour 3: Fit it all together – what does an ecosystem mean?
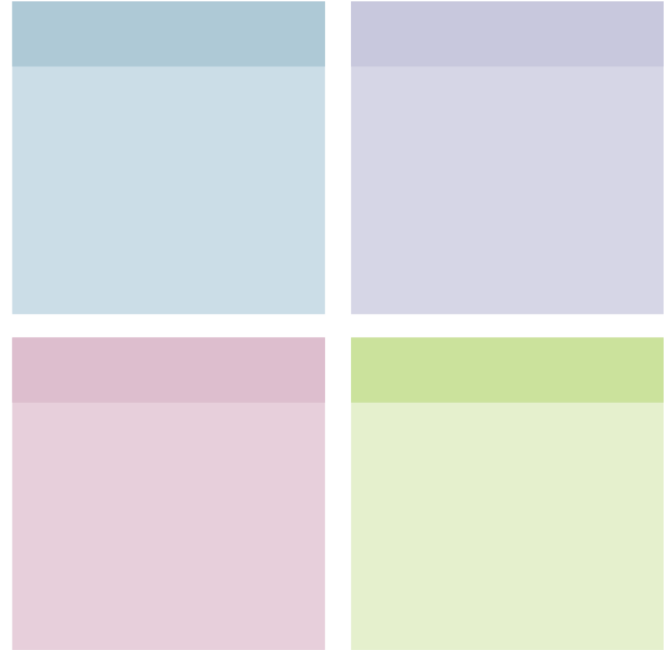
EXERCISE: OUR MAIN CONCERN IS…

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

Dan Hickey
Star Wars Nerd

DELCOR SNAPSHOT

DC OFFICE:
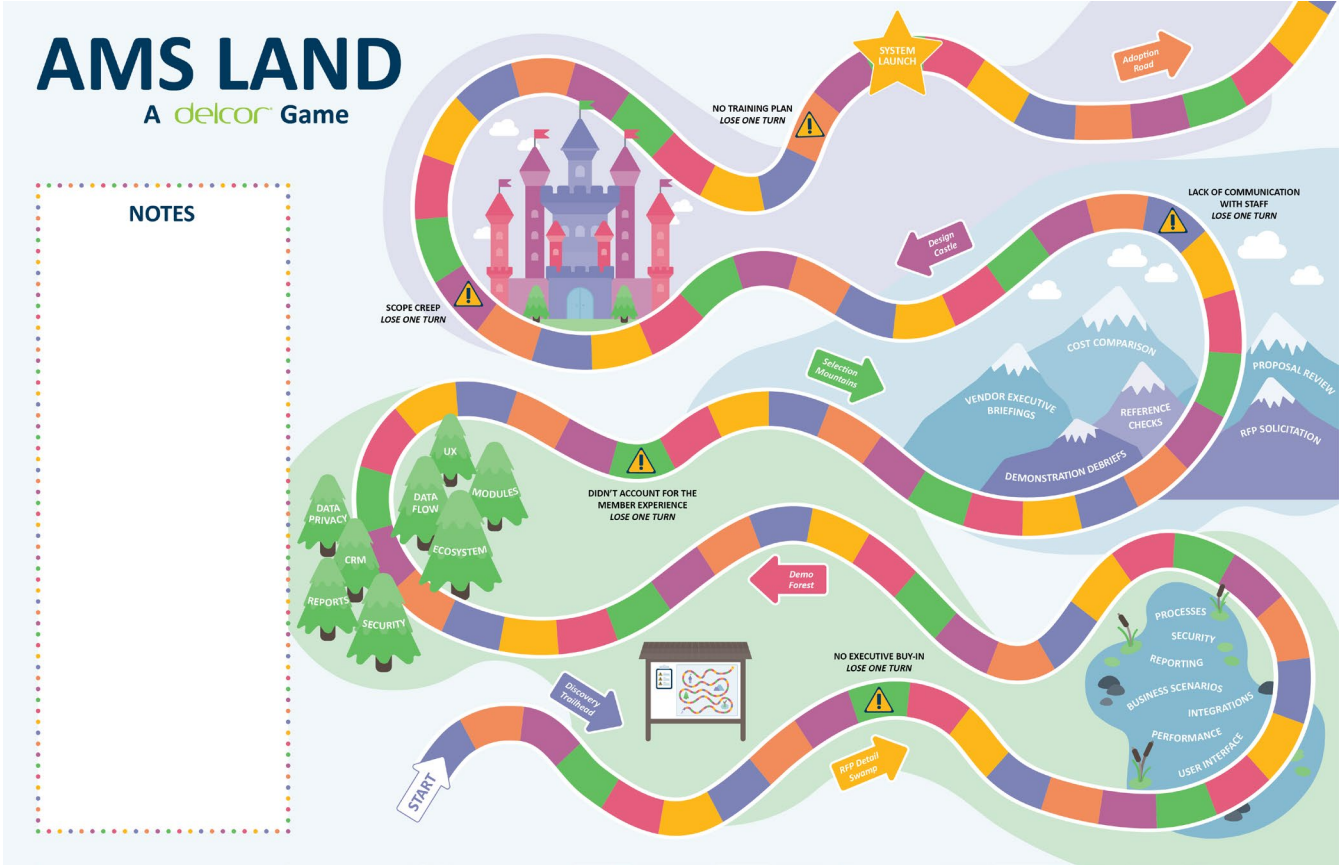SILVER SPRING, MD

MIDWEST OFFICE:
CHICAGO, IL

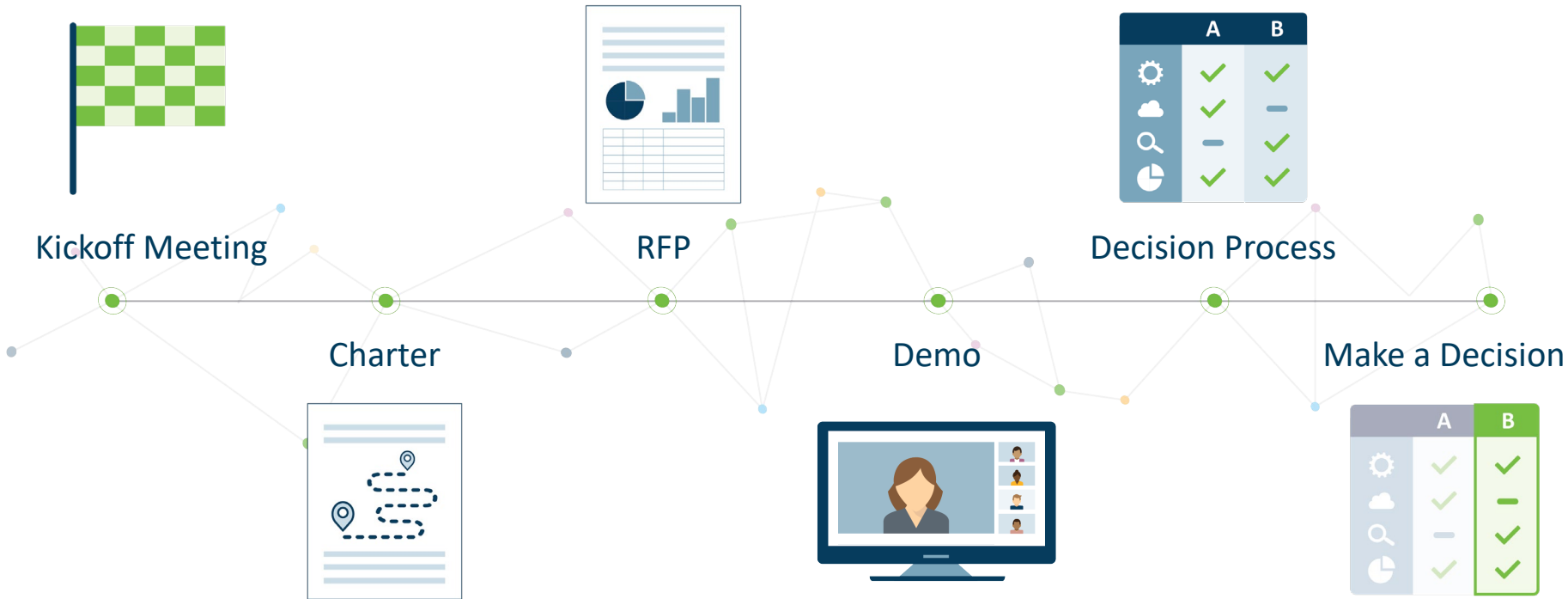| 501(C) COMMITMENT	35+ YEARS IN BUSINESS	90+ FULL-TIME STAFF	40+ DIFFERENT CERTIFICATIONS	VENDOR-AGNOSTIC CONSULTING

DELCOR AMS LAND

POLL

How long should the selection take?
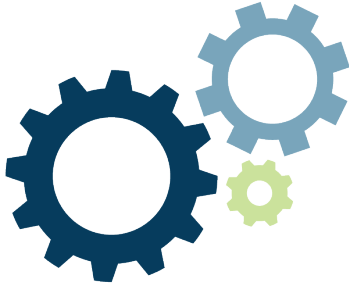
a) 1-3 months

b) 3-6 months

c) 6-9 months

d) 12+ months

SYSTEM SELECTION PHASES

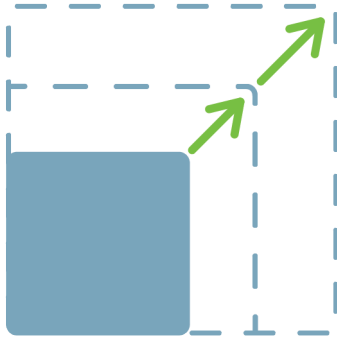Kickoff Meeting

Charter

RFP

Demo

Decision Process

Make a Decision

AMS OVERVIEW

Selection Process
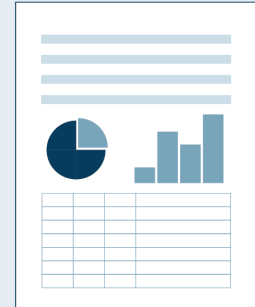
Tools

Scaling

GET SET

Get Set

- Project Scope
- Team
- Plan

Docs and Demos

- Requirements
- Vendors
- Demos

Proposal & Selection

- RFP
- Proposal
- References

STEP 1: PLANNING

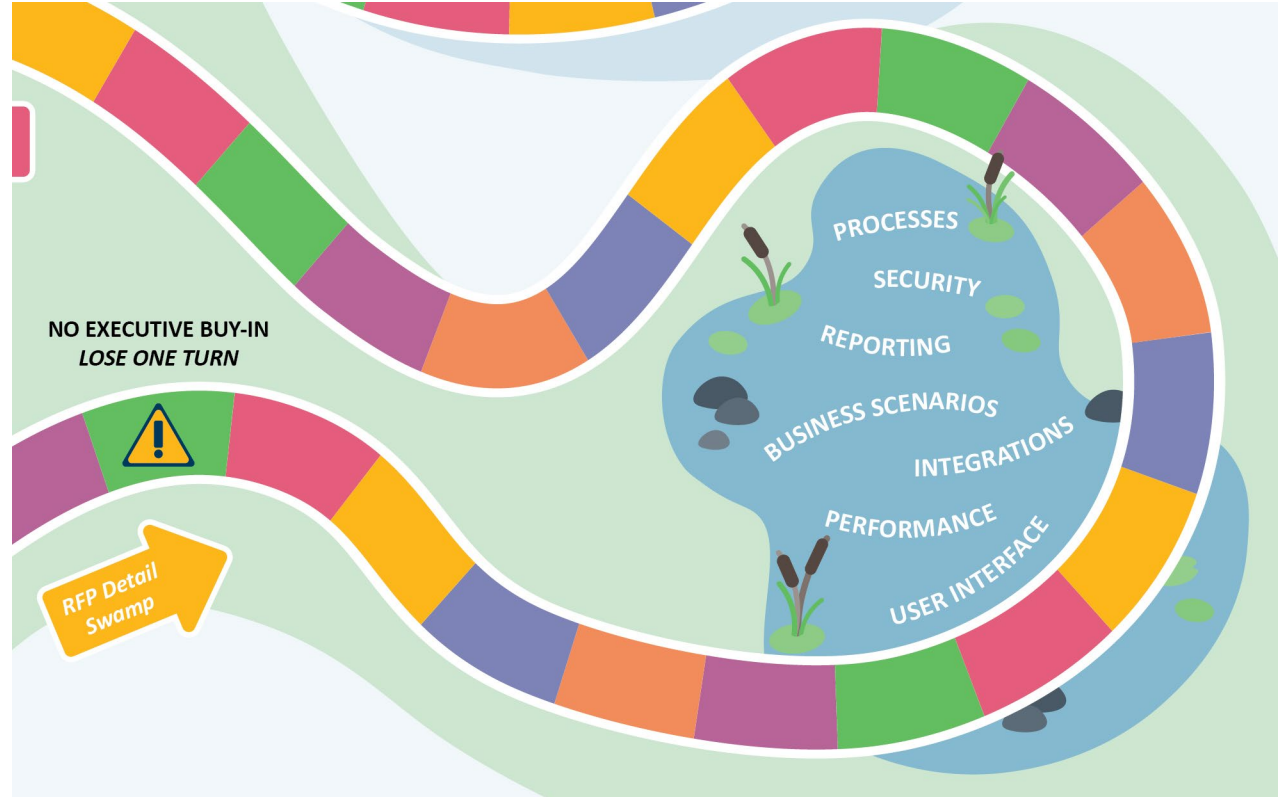Define business needs

Discuss ground rules

Document goals and guidelines

EXECUTIVE BUY IN?

Lose a turn!

NO EXECUTIVE BUY-IN
LOSE ONE TURN

RFP Detail Swamp

PROCESSES
SECURITY
REPORTING
BUSINESS SCENARIOS
INTEGRATIONS
PERFORMANCE
USER INTERFACE

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

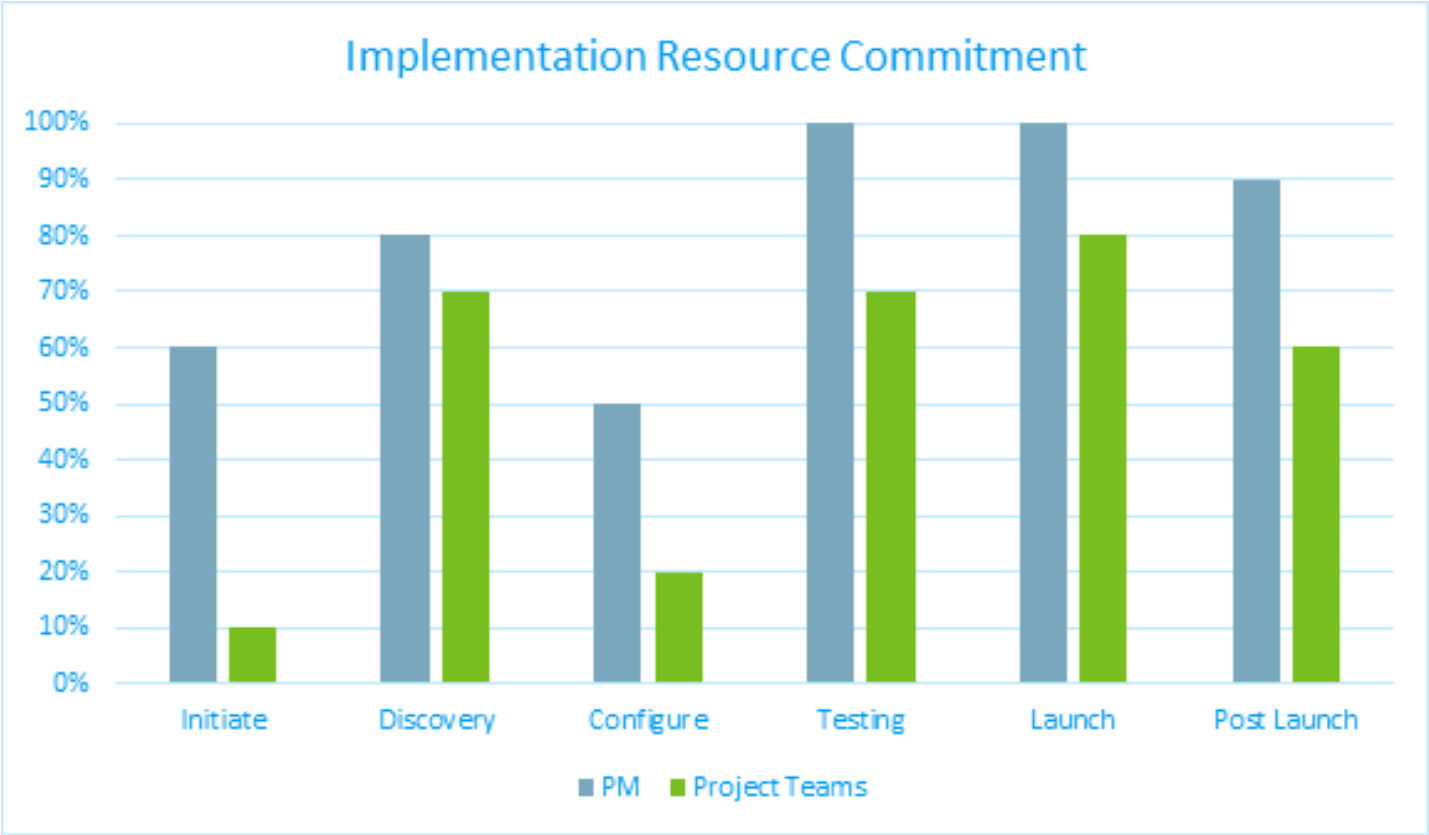# ROLES AND RESOURCES: NEED ADVICE FROM DELCOR?

- 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

Implementation Resource Commitment

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

COMMUNICATION: RANK WITH LIMITED RESOURCES

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

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
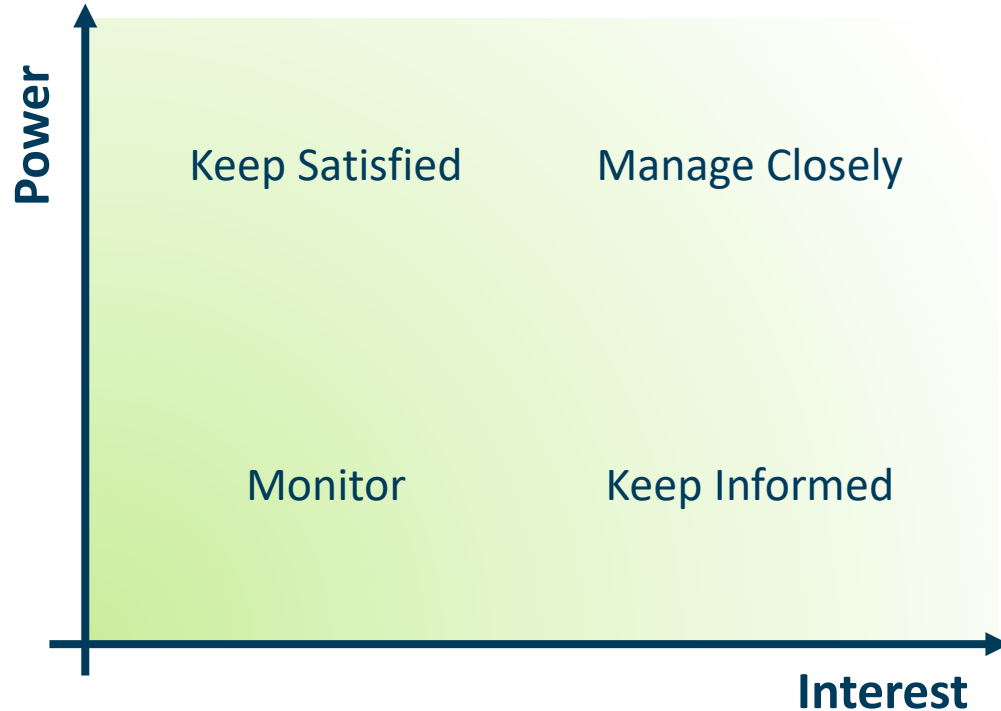
COMMUNICATION: INTERNAL AND EXTERNAL

- 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

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

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

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, 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.

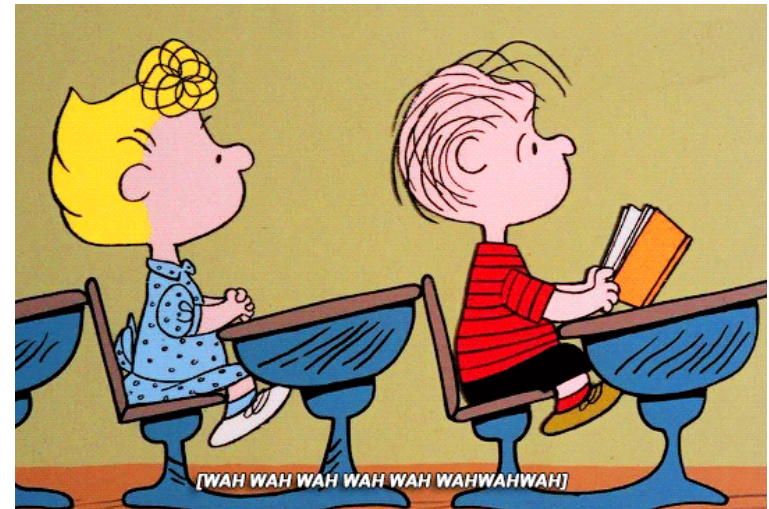# BUSINESS AND PROCESSES: JUST ENOUGH DETAIL

BUSINESS processes

VS

business PROCESSES
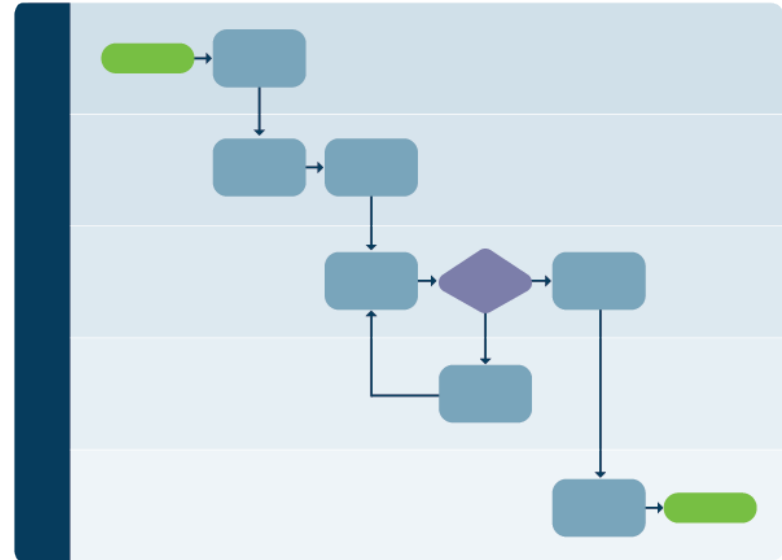
REQUIREMENTS: TELL YOUR NEIGHBOR

- 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?

DIDN'T ACCOUNT FOR MEMBER EXPERIENCE!

Lose a turn!

PULL IT TOGETHER TO BUILD THE RFP

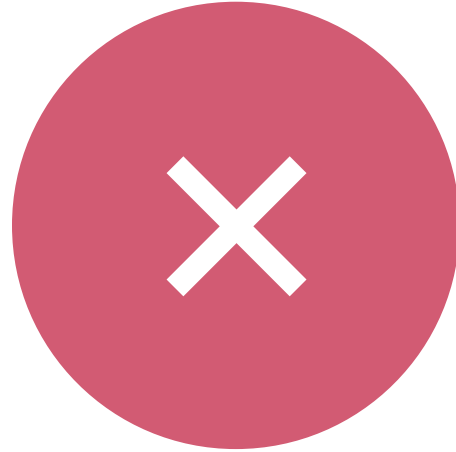Why do I need an RFP? Can't I just ask for a proposal???

Checklist:

o   Introduce the project

o   Background of your organization

o   Project goals and scope

o   Business objectives

o   Overview of functional areas

o   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

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

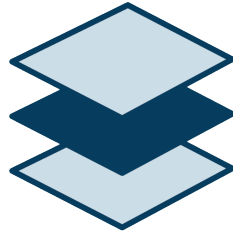- Share staff size and resources

- 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!

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

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

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)
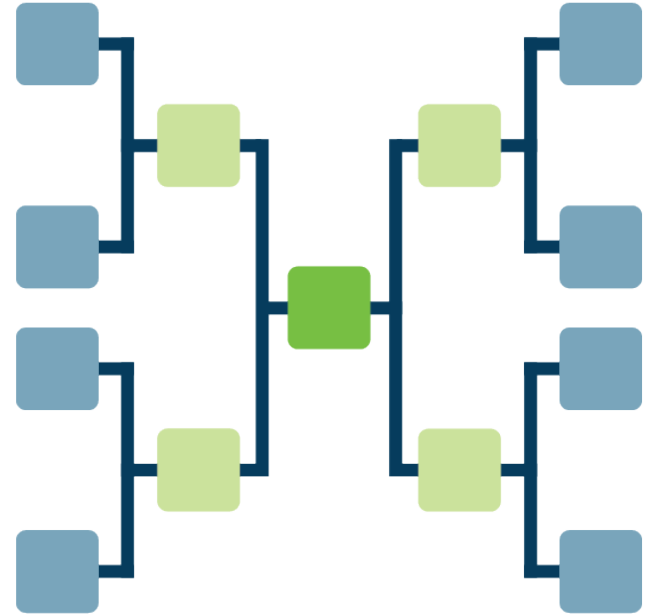
SHOULD I INCLUDE VENDOR FEEDBACK THAT'S INCOMPLETE?

YES
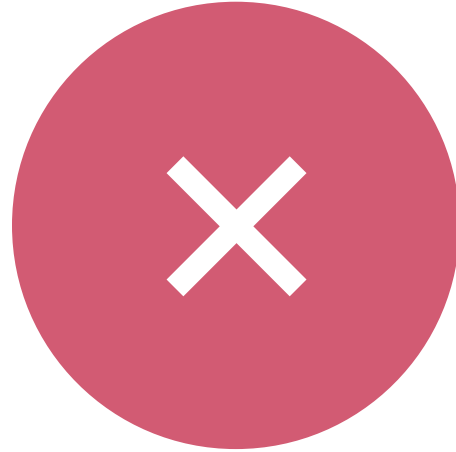
NO

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
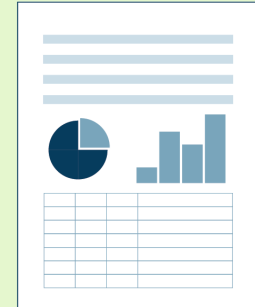
SCORING THE PROPOSALS

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: SCORING SHEET

A	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
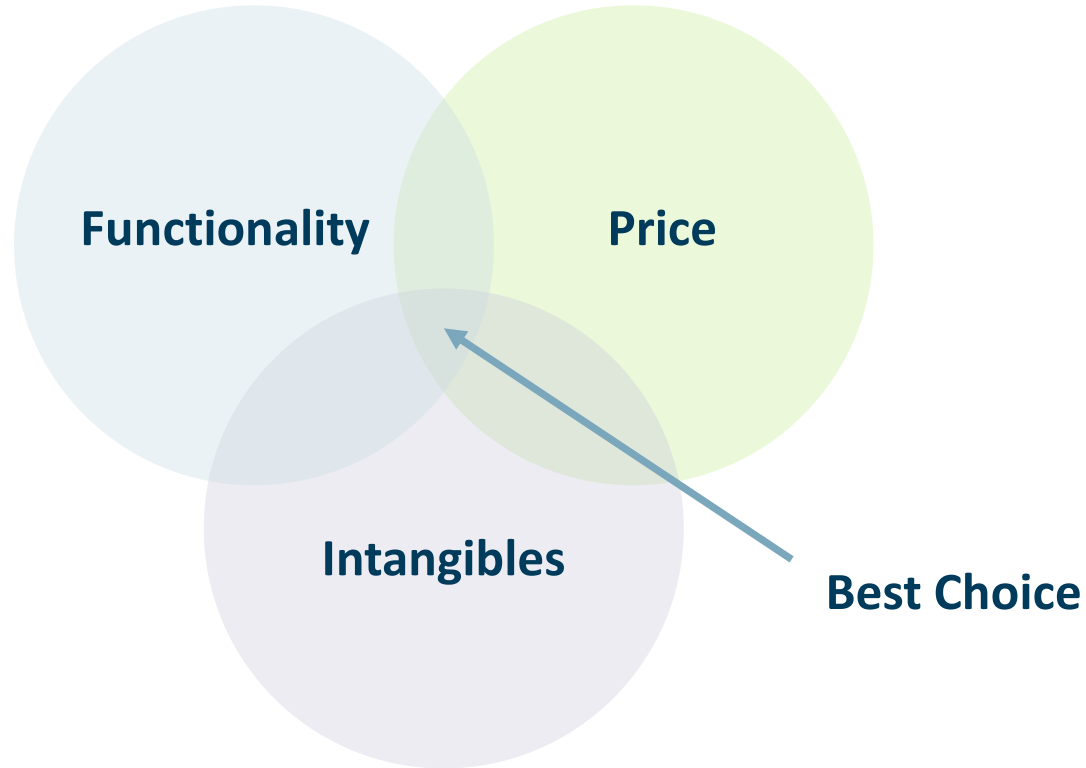
IT'S OKAY TO SELECT THE SYSTEM YOU LIKE

- Systems in the same class are similar

- What system can you SEE yourself using?

- Did it make sense during the demo?

- Make a choice

CONTRACT (MSA AND SOW)

Legal

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

Work Together

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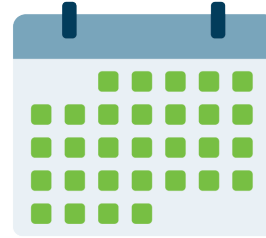- Acceptance
- Exit Strategy

WHAT'S NEXT?

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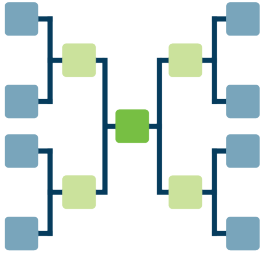
Choose the partner that is the best fit for your organization.

Plan
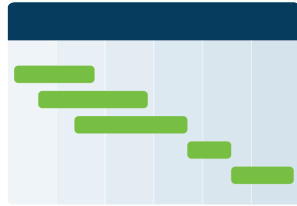
Review staff calendars and plan for the selection process.

Schedule

Schedule the project kickoff and discovery meetings.

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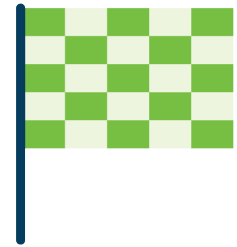
Get started! There's never going to be a better time to start.

SCOPE CREEP

Lost a turn!

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

15 MIN...GO!
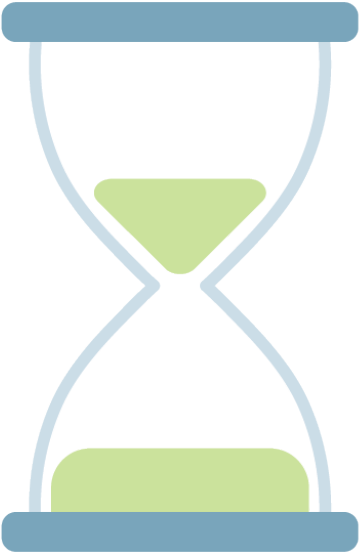
WHAT AREAS CAN YOU ADDRESS RIGHT NOW?

- Business Processes
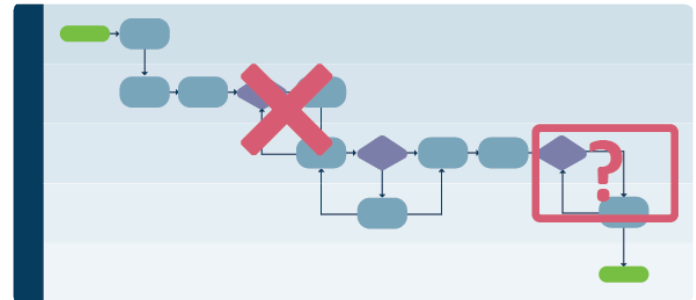
- Ecosystem

- Data

- Change Management

- Roles

BUSINESS PROCESSES:

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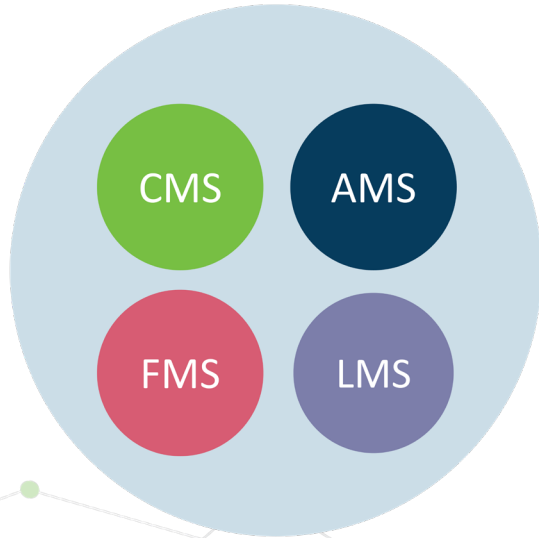
Identify:

- Difficult requirements

- Areas that required customization

- Processes that need the most customer service/TLC

- Processes that support the most revenue
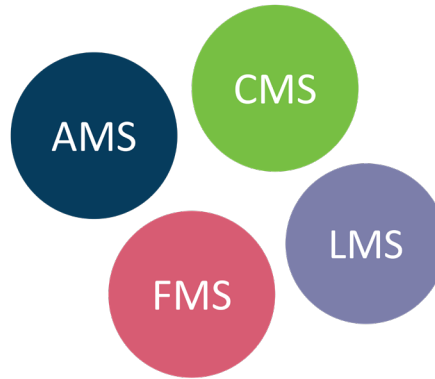
- Processes that can be automated

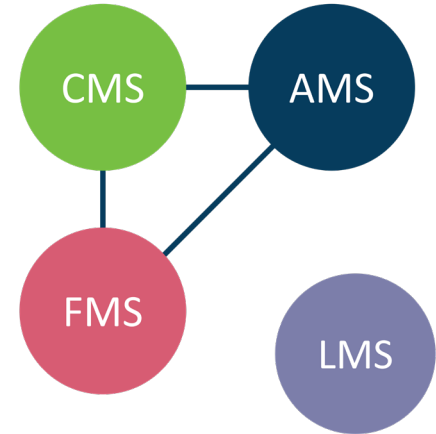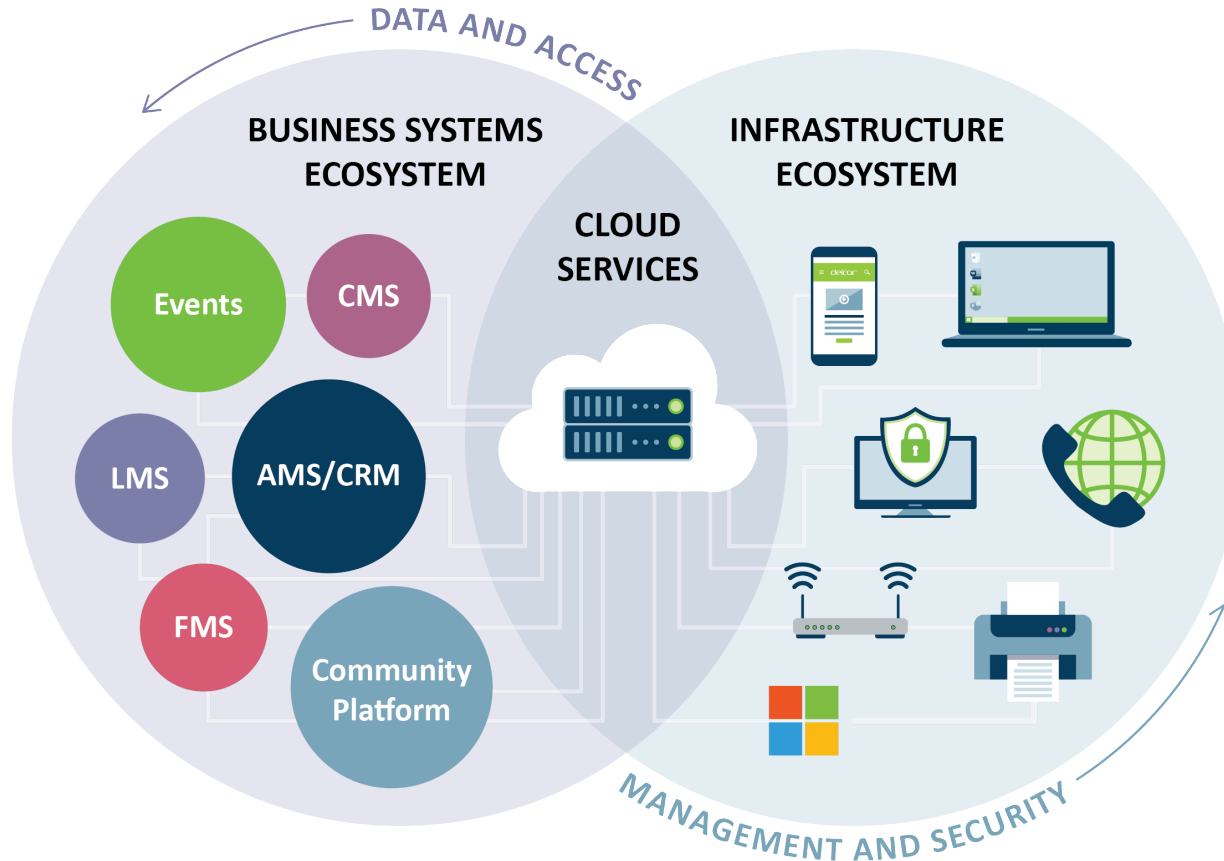# ECOSYSTEM: DEFINE AND UNDERSTAND YOUR SYSTEMS

CENTRALIZED

DECENTRALIZED

INTEGRATED

BUSINESS SYSTEM AND INFRASTRUCTURE ECOSYSTEMS

DATA AND ACCESS

BUSINESS SYSTEMS ECOSYSTEM

INFRASTRUCTURE ECOSYSTEM

CLOUD SERVICES

Events

CMS

LMS

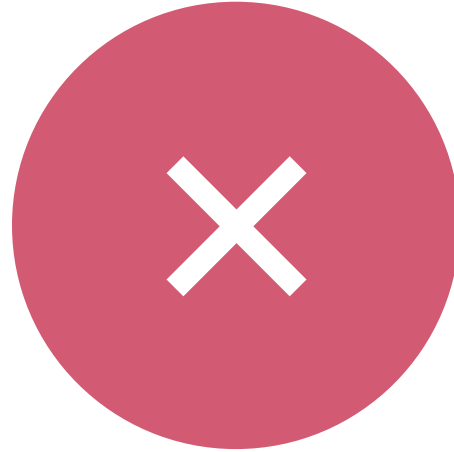AMS/CRM

FMS

Community Platform

MANAGEMENT AND SECURITY

PAAS/SAAS: ASSOCIATIONS 'OWN' THEIR PART OF THE SYSTEM

TRUE

FALSE

RELATIONSHIPS: SYSTEM, VENDOR, AND ASSOCIATION
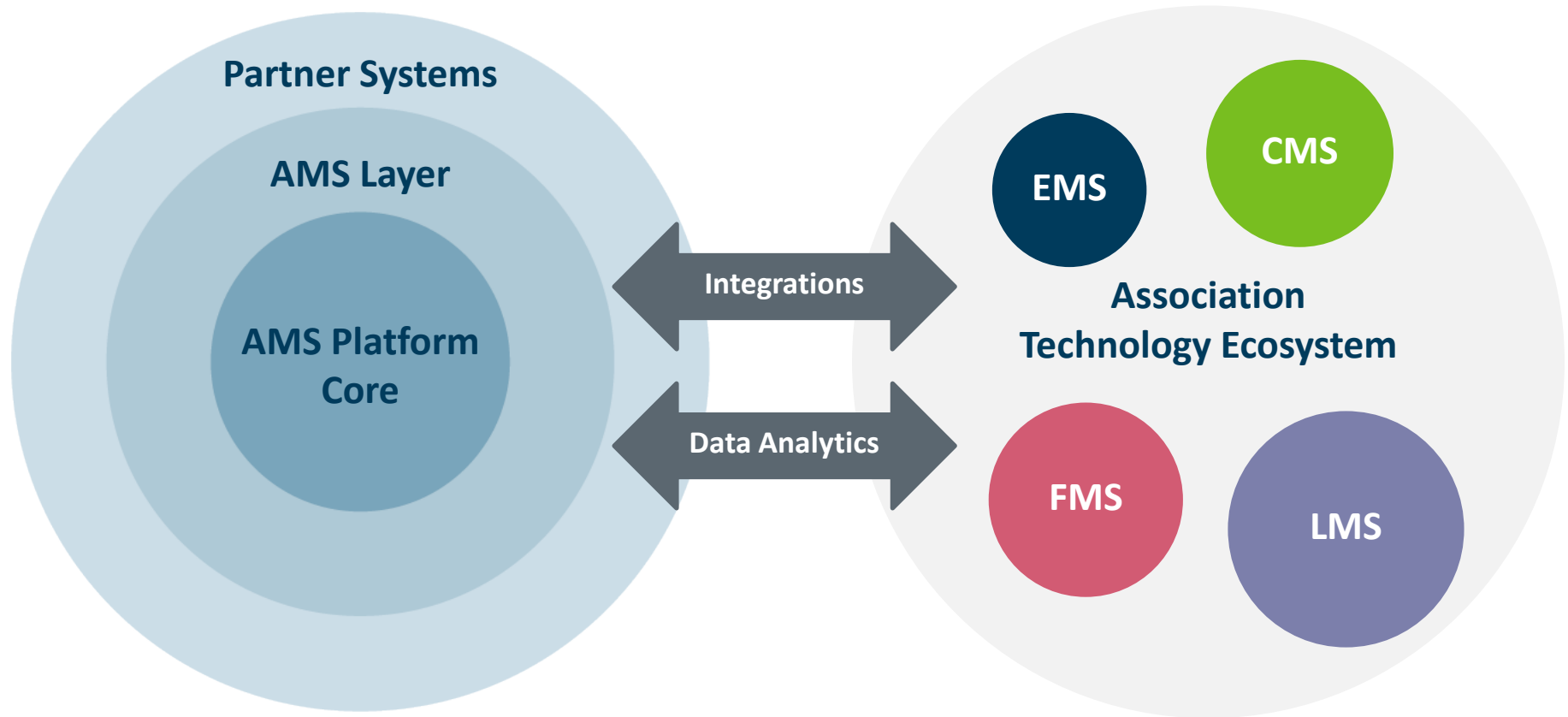
ECOSYSTEM: IDENTIFY YOUR PARTNER SYSTEMS

|			
Sales	**Apps**	**Analysis**	**Learning (LMS)**
Event Management	**Connectors**	**Certification**	**Email Marketing**
Payment Processors	**Microsoft Office**	**Survey**	

ECOSYSTEM: DRAW YOUR ECOSYSTEM (SCREEN BREAK)

1. Draw each element of your technology ecosystem

   - Focus on customers, not internal network, MS Office, etc.

2. Size each element by % of services within the association

3. Add $ for revenue for the organization ($-$$$$)

4. Draw connections between systems

   - GREEN dot if connections exists and works well

   - RED dot if connection does NOT exist or is a PIA
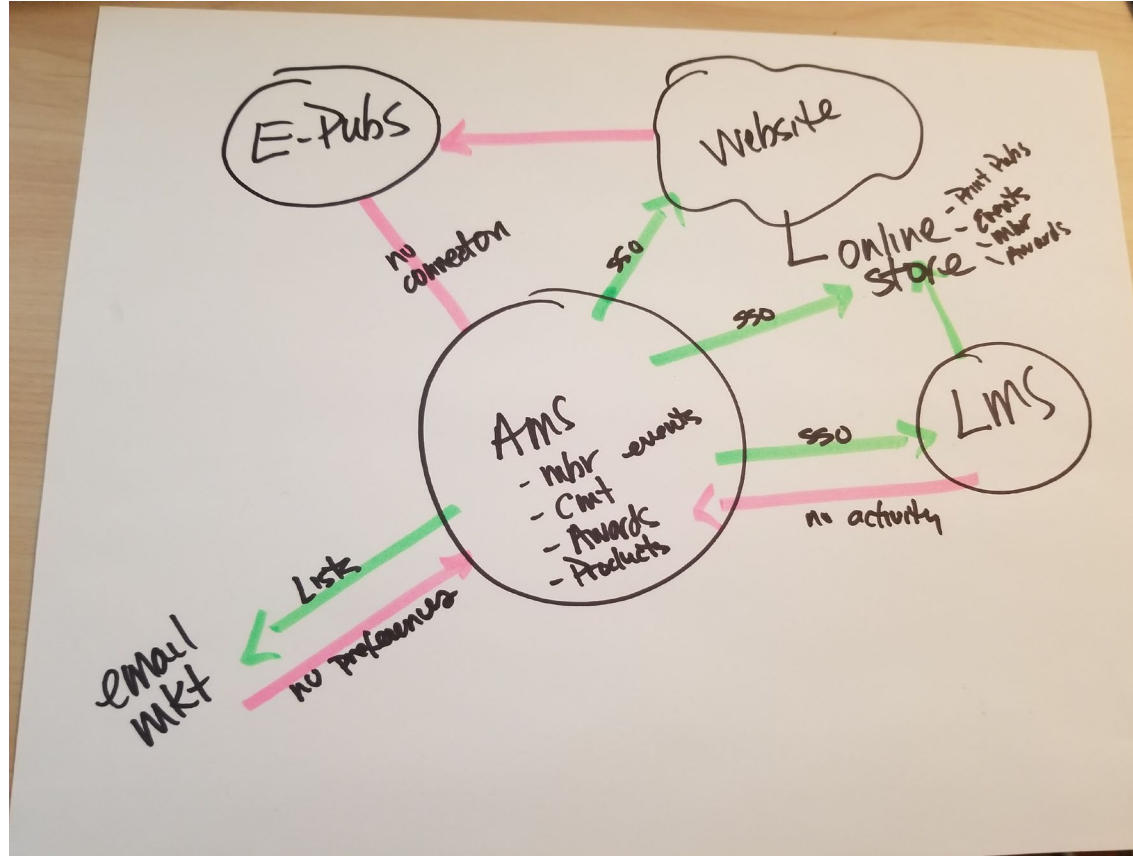
ECOSYSTEM MAPPING

- Will fees be collected?

- How much data needs to be in each system?

- What are the benefits of integrating each system vs using a manual process?

- What are the benefits of using SSO?

- How have you personalized the systems?

- What is threshold to add or remove an application?

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
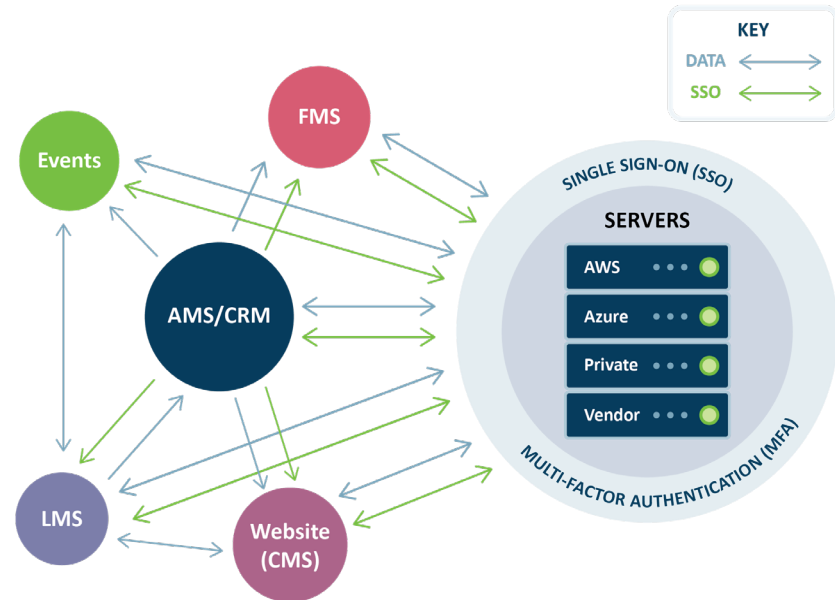
DATA: IDENTIFY AND DOCUMENT YOUR INTEGRATIONS

- Define your data integration needs – current and future

  - SSO/Authentication

  - One Way Data Exchange (AMS to FMS)

  - Two Data Exchange (AMS>LMS>AMS)

- Define business rules of each integration

- Who is responsible for each integration (staff/vendor)

- Impact: Cost and effort

DATA: WRANGLE YOUR DATA

Wrangle is defined as: Argue, dispute, quarrel, battle, squabble, disagree
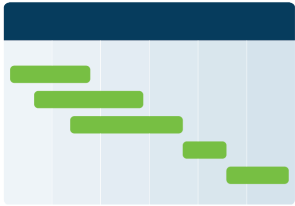
What are you REALLY doing with your data??

- Data conversion

- Report inventory

- Data standards
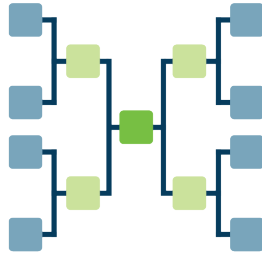
- Data integration

WHAT'S NEXT?

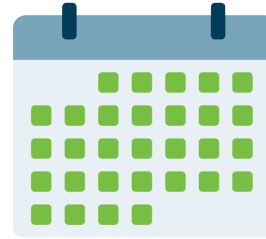| Plan	Identify System	Schedule	Start

Plan
Identify your goals and align with your association's strategy
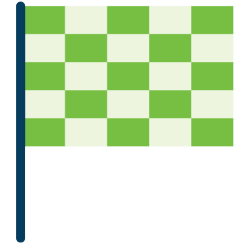
Identify System
Create a business system ecosystem map

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
- DelCor Ecosystem Info
- DelCor AMS Info

CONTACT US

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🐦 **@delcor**

in **DelCor Technology Solutions**