

AMS Considerations

Scan this code for more information and to download the checklist.



General Criteria

- The system is designed and positioned for growth. It allows for scalability to accommodate future needs.
- Ensure the expectations of your members can be met.
- The solution is portable so that your team can work efficiently.
- A standard, clearly documented, robust API is available.
- The system can be independently configured and extended.
- There are little to no limits on use of third-party vendors.



Functionality

- Confirm the features and functions available. Do they align with your organization's key touchpoints?
 - CRM, Membership, Events, Committees, Certification, Exhibits, Sponsors, Sales
- The customer portal meets expectations.
- The platform technology/architecture is current.
- There are standard API capabilities available.
- Your accounting processes fit within the solution.
- System performance is stable.
- The reporting and analytics features are robust and easy to manage.
- The system allows for process automation.
- It is not difficult to extend or modify structure.
- It is compliant with data protection and privacy regulations.



Fit

- User interface (internal and external) meets your standards.
- There is confidence in the solution provider to "deliver."
- Vendor relationship and organizational culture is healthy.
- Alignment of strategic direction/roadmap
- Confirm your implementation schedule needs matches the vendor's schedule and availability.
- Support availability meets your organization needs -
 - Direct, after-hours availability, training, documentation, user communities, etc.
- Handling of upgrades and releases is acceptable.
- The vendor is certified and experienced with a track record of success.
- Vendor has demonstrated an understanding of your industry.
- Understand where the vendor is located; firm up any travel or onsite expectations.
- The proposed project delivery model is agreeable.
- Consider the license requirements (if any).
- The solution is affordable.



Selection Process

- Assemble your team of stakeholders, project team members, and subject matter experts.
- Assess your organization needs and identify requirements.
- Prioritize requirements to align with your organization's strategic objectives.
- Define a budget.
- Research the market for vendors.
- Request information from vendors.
- Narrow the vendor list to the 2-3 solutions and offerings that match your needs.
- Determine a process for evaluating and selecting -
 - Your process might be developing a demo format or script for the vendors to follow.
 - Consider including a scoring sheet for use during review of the demos.
- Create and distribute RFP.
- Schedule and attend vendor demos.
- Collect demo feedback and outstanding follow up questions.
- Schedule and attend any follow up vendor sessions.
- Review and compare the features and estimates from vendors -
 - Can you customize applications to meet specific needs?
 - Will it integrate with your other systems?
 - Is the software out of the box or custom built?
 - What type of support is available and what hours are they offered?
 - What are the costs? (License, SaaS and Modification fees, Installation, Training, Annual Support)
- Conduct reference checks.
- Make a decision.
 - Reference your scoring sheets -
 - Weigh the key factors on a scale of 10 according to their importance for you.
 - Place a check under the AMS if it rates high in each category.
 - Add the corresponding factor weights to find each AMS score
 - Compare scores and choose
- Negotiate as needed.
- Sign on the dotted line and prepare for the next marathon – Discovery!



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the checklist



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