
Life After Selection™



Achurch Consulting
Presentation for



AMS FEST
powered by **Association TRENDS™**

November 19, 2021

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Welcome!

Kickoff Your New
AMS Relationship
on the Right Foot



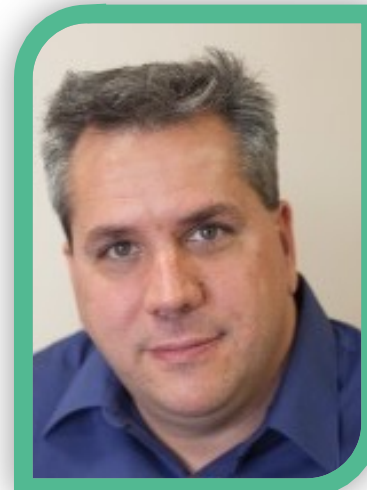
Today's Lineup

- 11:00 am–11:20 am Welcome and Introductions
- 11:20 am–11:45 am Making it Official & Pre Discovery: **REA**
- 11:45 am–11:55 am Break / AMS Dear Abby
- 12:05 am–12:40 pm Vendor Discovery: **George**
- 12:40 pm–12:50 pm Break / AMS Dear Abby
- 12:50 pm–1:10 pm Implementation: **George**
- 1:10 pm–1:20 pm Break / AMS Dear Abby
- 1:20pm–1:45 pm Launch: **George**
- 1:45 pm–2:00 pm Wrap Up & final Questions

Introductions



Rebecca



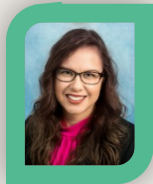
George



Marla

Tell Us About Your AMS Relationship Status

Introduce Yourself....



- 1. I'm in a bad relationship**
(Still in pain with my current AMS – trying to sell the idea internally)
- 2. I've decided to leave, but my partner doesn't know**
(We've had it – beginning to figure it all out)



- 3. I'm on Tinder, but I don't have a profile picture**
(We've started the selection process)
- 4. I'm ready to swipe right**
(What do I need to know?)
- 5. I'm dating/starting a new relationship**
(How do I make this one work?)

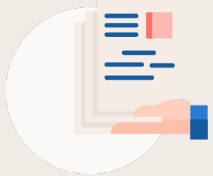
Today's Lineup

6 Phases of a Successful Implementation



Make it official

Selecting your team and completing your contract



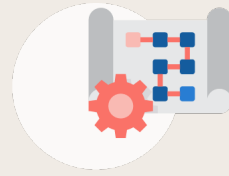
Pre-Discovery

Transitioning from sales and establishing your internal team



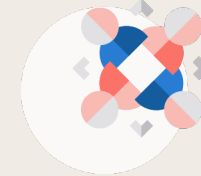
Discovery

Defining your requirements to your implementation partner



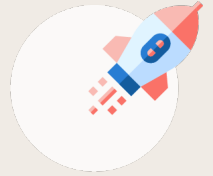
Implementation

Configuring the new system



Launch Preparation

Preparing internal and external stakeholders



Launch Day

Bringing the new system to life

The First Steps



First Actions

Complete the Contract

Form the Implementation Team

Set internal and external expectation



Make it Official

Solidifying Your Contract



- Understand the Fee Structure
- Years of the Agreement
- How do the licenses scale? What's the escalation clause?
- Plan for Growth



Make it Official

Solidifying Your
Contract



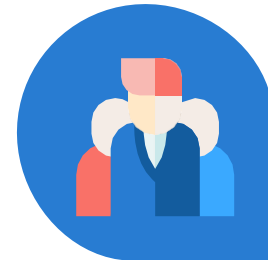
Form Your External Team

AMS Company

Implementation Partner

3rd Party Consultants

User Groups/Networks



Make it Official

Solidifying Your
Contract



Planning Your Budget

Identifying operating and capital
expenses

Contingency for the unexpected



Use an assessment...

any assessment



CliftonStrengths

EXECUTING

Achiever
Arranger
Belief
Consistency
Deliberative
Discipline
Focus
Responsibility
Restorative

INFLUENCING

Activator
Command
Communication
Competition
Maximizer
Self-Assurance
Significance
Woo

RELATIONSHIP BUILDING

Adaptability
Connectedness
Developer
Empathy
Harmony
Includer
Individualization
Positivity
Relator

STRATEGIC THINKING

Analytical
Context
Futuristic
Ideation
Input
Intellection
Learner
Strategic



Job Functions and Personality



HISTORIAN

Provides context.
Starts sentences with, "...one time we..."



DISRUPTER

Visionary, risk taker, thinks anything is possible. Starts sentences with "...maybe we could..."



CONTRARIAN

Pokes holes, identifies risks, perfectionist. Starts sentences with "...but..."



EXPERT

Subject matter expert. Provides feedback.



Pre Discovery

Prepare the
Team

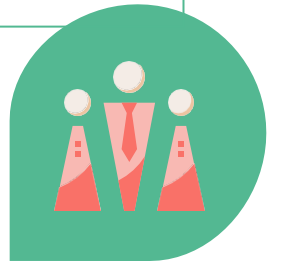
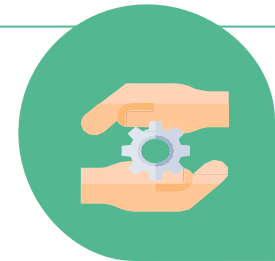


Make a Smooth Transition

Handoff from sales to services

Introduce new team members

Set communication expectations
with your vendor



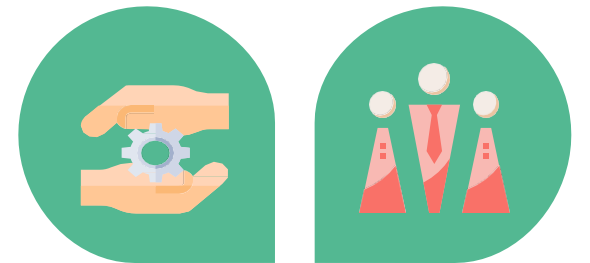
Pre Discovery

Align Internal
Expectations



Project Charter

- ✓ Goals and objectives
- ✓ Scope (including data conversion)
- ✓ Stakeholders, team members and project sponsor(s)
- ✓ Success criteria
- ✓ High level timeline and schedule considerations
- ✓ Project risks



Pre Discovery

Align
Expectation



Set Team Expectation

- Define each role – communicate strengths and blind spots
- Articulate the time commitment
- Identify external stakeholders and begin communicating
- Establish communication channels and protocols

Pre Discovery

Tools to have at the ready

- Task Management/Assignments



- Project Management/Time Tracking



- Document Management



- Casual Communication/Collaboration



- Visualization Tools



Break and AMS Dear Abby



Vendor Discovery

What is it?



Discovery Process

- Kickoff project with vendor
- Vendor questionnaire
- Interviews with staff to understand what is needed
- Requirement documentation and review
- Cost estimate
- Decide on what will implemented

Vendor Discovery

Kickoff the Effort



Who Should Attend?



**Vendor
Team**



**Client
Core**



**Project
Sponsors**

- Introductions
- Roles & Responsibilities
- Goals & Objectives
- High Level Timeline
- Scope
- Success Criteria
- Vendor's Approach
- Next Steps

Vendor Discovery

Staff Interviews – Prep the Team

You WILL be repeating yourself

There WILL be nomenclature changes

Give the **What** AND the **Why!**



Don't hide pain points

Focus on the **To Be** State, not the **As Is**

Draw Pictures

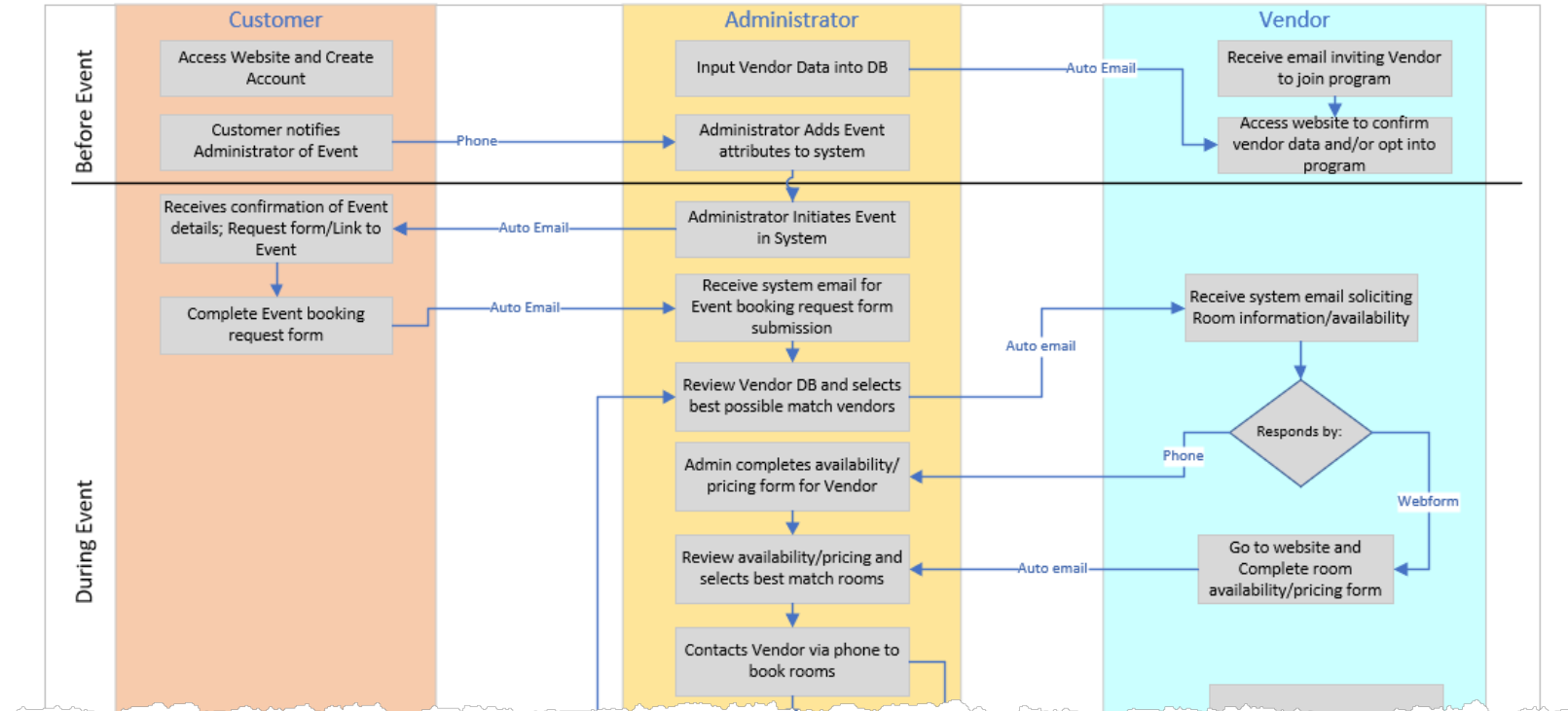
Vendor Discovery

Draw Pictures



Complicated System or Process?

Draw a Picture!



Vendor Discovery

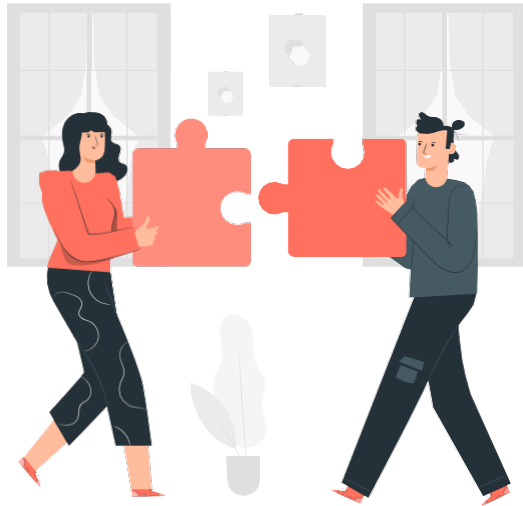


Reports Inventory

	A	B	C	D	E	F	G	H
1	Report Name	Description	Importance	Run Frequency	Source	Used By	How is this report utilized?	Link to example
2	Membership Invoice	Generated in mass for annual renewal. Has tear away	High	Annual & One Off	AMS	Bill & Janet	Run from the maass dues renewal process, sent via mail and can be linked to online for online payment	www.dropbox.com/report1
3	Certification Certificate	The "pretty" certificate that is available online for someone to print once they become certified. There are 3 variations to accommodate our 3 certifications	High	On Demand Online	AMS	Cindy & Online Users	Made available on My Profile once a person becomes certified	www.dropbox.com/report2

Vendor Discovery

Finalize Integrations



- What Integrations need to be part of Phase I?
- Are all Integrations still needed?
- Gather Integration specifications
- Inform Integration vendors of the move to a new AMS

Vendor Discovery

Data Conversion Analysis



- How many sources and records in each?
- What is the data quality of each source?
- Why does it exist? Is it valuable? Who owns the data?
- How much historical data to bring over?

Vendor Discovery

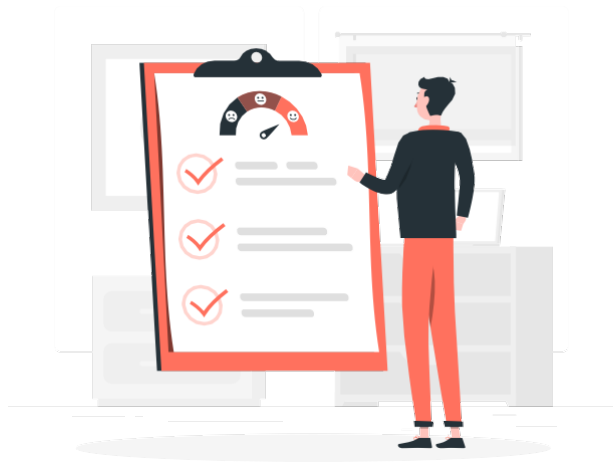
Data Conversion Strategy



- Do you have internal resources to pull down and scrub data?
- Clean your data!
- Can historical data be moved to post-go live?
- Be strategic!

Vendor Discovery

Requirements Review

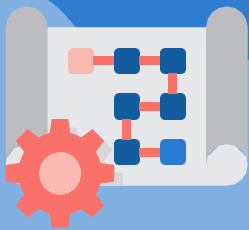


- Are they “Getting It”?
- Requirements should tell the story and “why” it exists.
- Iterative process with feedback incorporated into final version.
- Cost estimates are provided.

Break and AMS Dear Abby



Implementation Schedule Approval

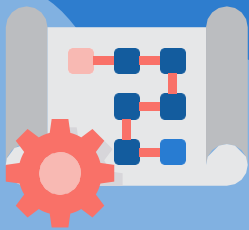


Project Schedule

- 7-9 Month sweet spot
- Consider Go Live timing
- Identify busy times for staff
- Include buffer time for testing, training, and contingency
- Have a backup Launch date



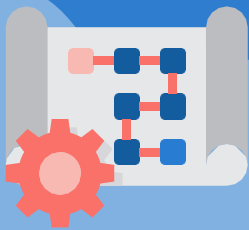
Implementation



You Can't Outsource Ownership!



Implementation Project Kickoff



Ramp up your implementation team and pull everyone together for a kickoff!

Share CliftonStrengths or other
assessment results

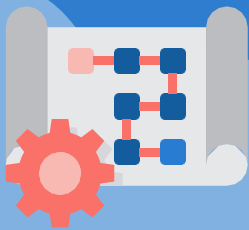
Review requirements, scope,
and success criteria

Review major milestone
dates

Set the project meeting
cadence



Implementation Escalation Plan

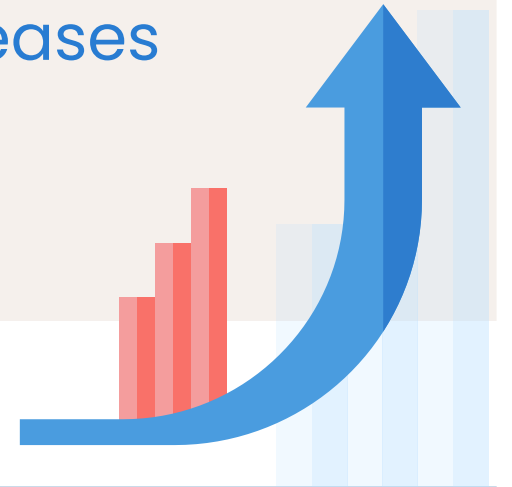


Have a framework for decision-making



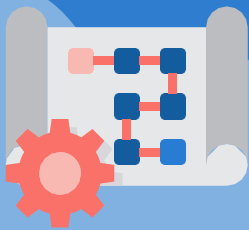
Who has the responsibility?

- Approve change orders within scope
- Approve budget increases
- Address staffing changes

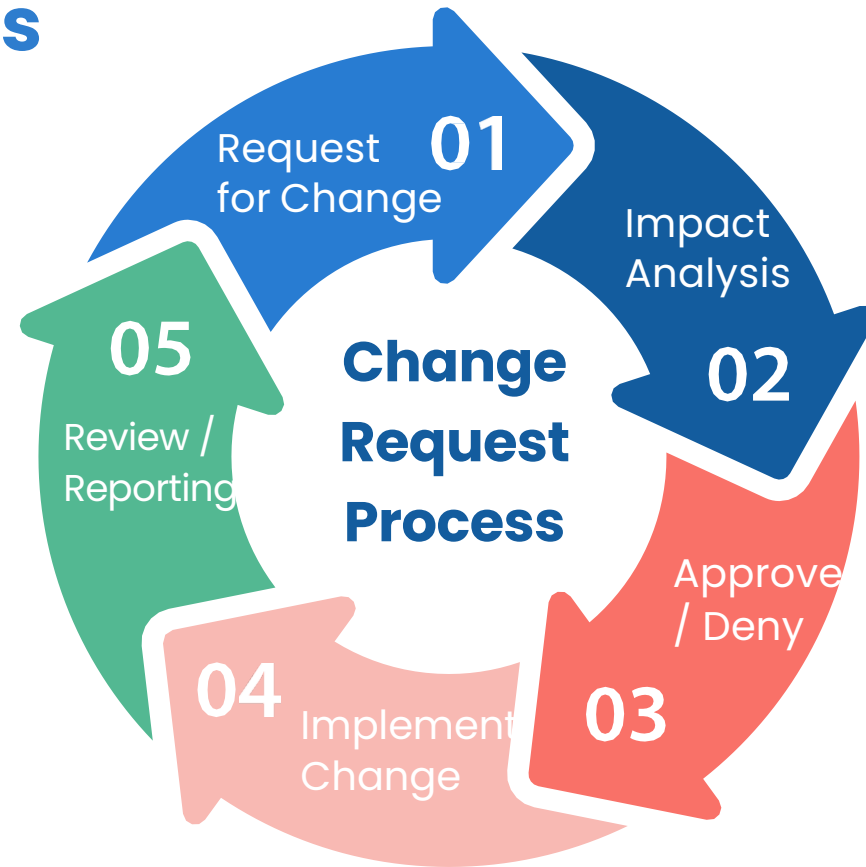


Implementation

Change Control

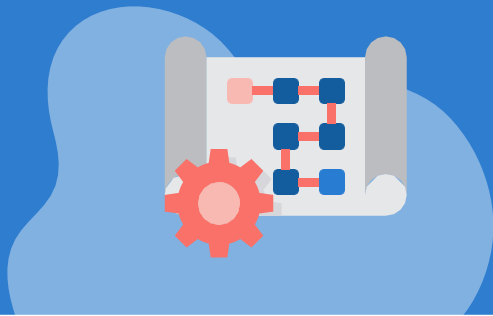


Incorporate a Change Request Process

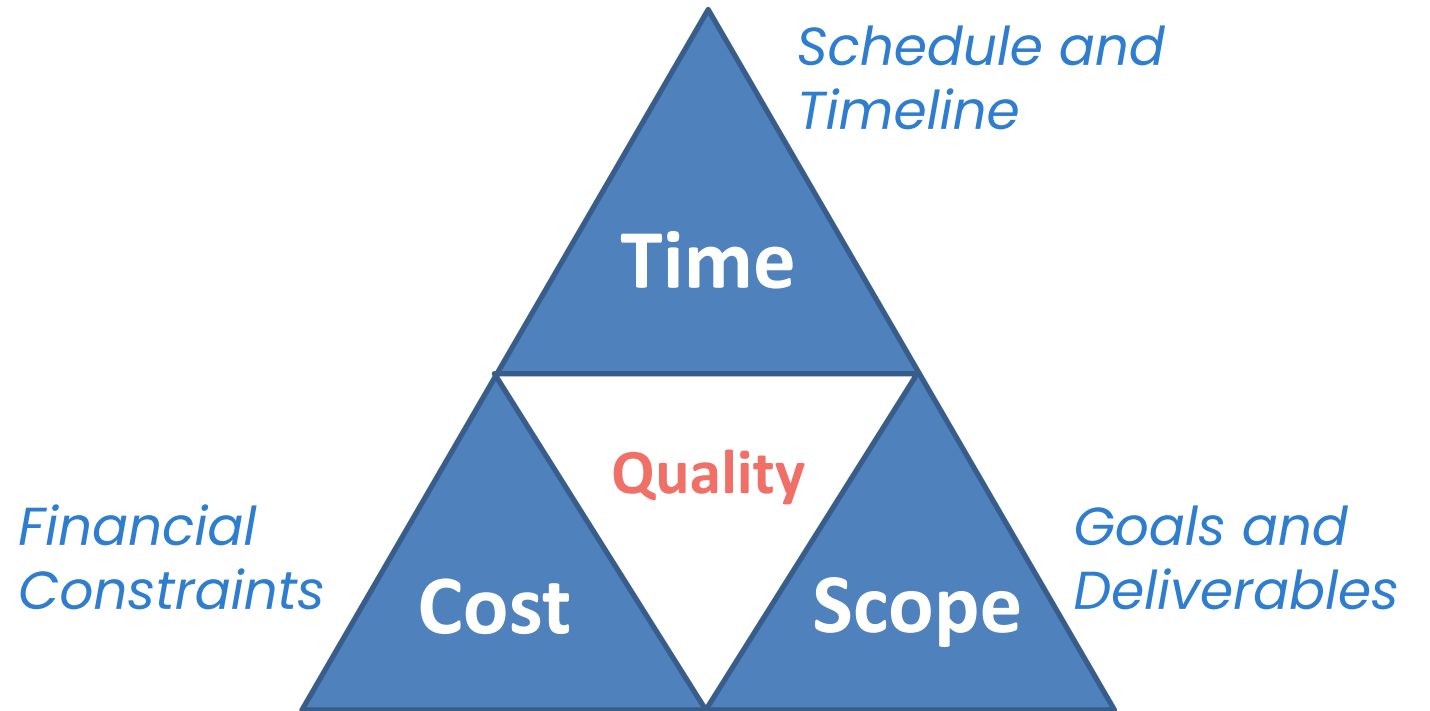


Implementation

Project Constraints

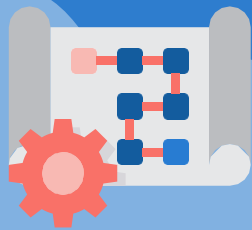


- **Acknowledge project constraints**
- **Configuration over customization**



Implementation

Testing Strategy



- Define a testing plan
- Think about:



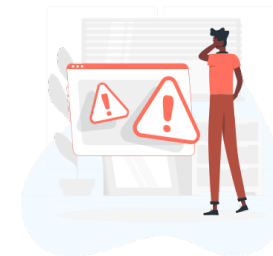
Team
(roles and responsibilities)



Environments

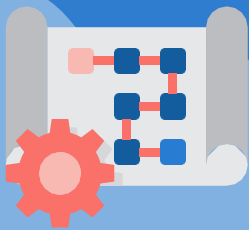


Test Results

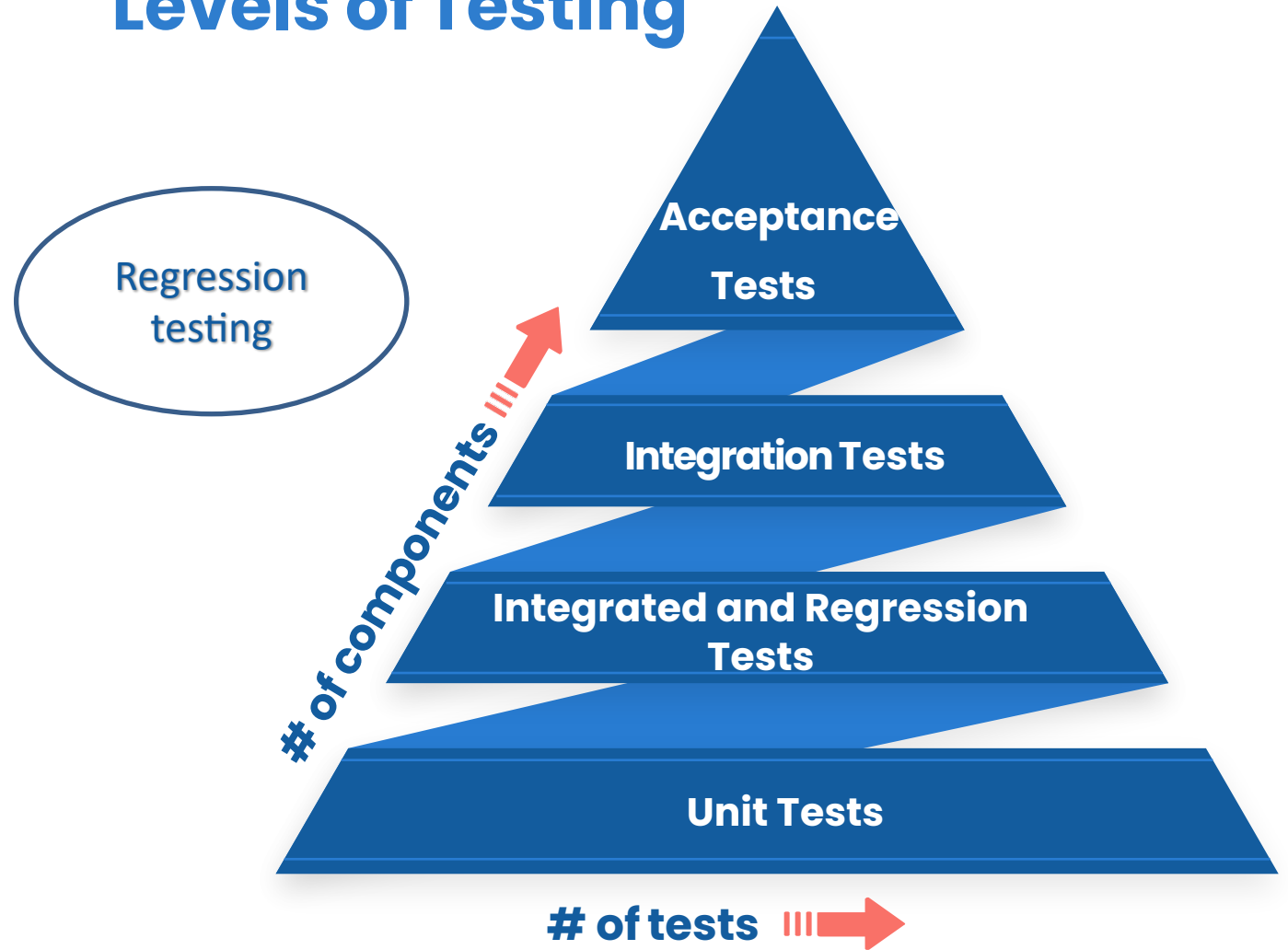


Project Risks

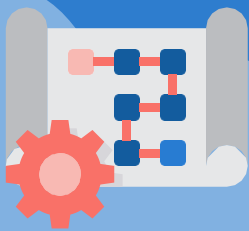
Implementation Testing Strategy



Levels of Testing



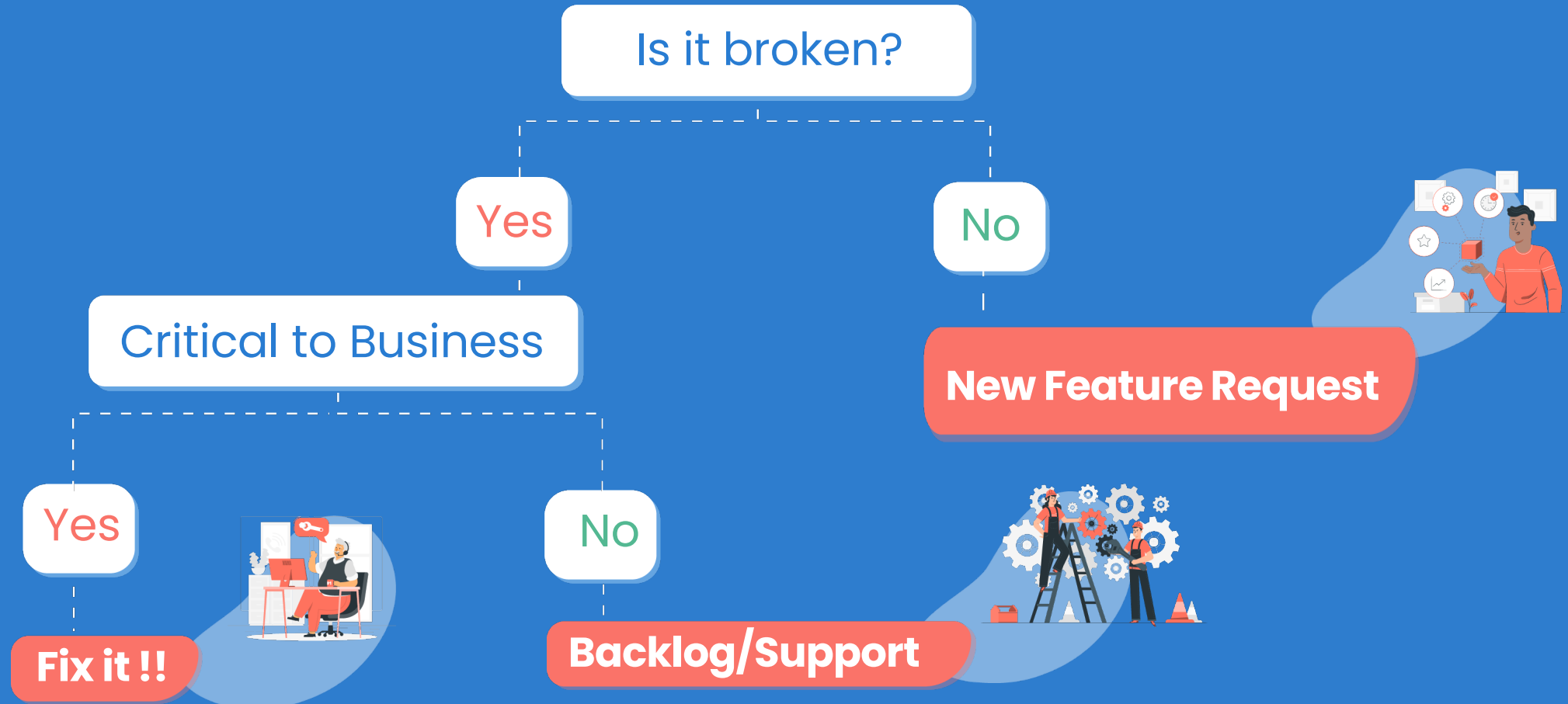
Implementation Issue Tracking



The screenshot shows the Jira interface for the 'Teams in Space' project. The left sidebar contains navigation options: Backlog, Board, Reports, Releases, Components, Issues, Repository, Add item, and Settings. The main area displays a Kanban board with four columns: TO DO (5 items), IN PROGRESS (5 items), CODE REVIEW (2 items), and DONE (8 items). Each column contains task cards with details like task description, labels (e.g., SPACE TRAVEL PARTNERS, LOCAL MARS OFFICE), status icons, and assignees. The URL in the browser is jira.teamsinspace.com.



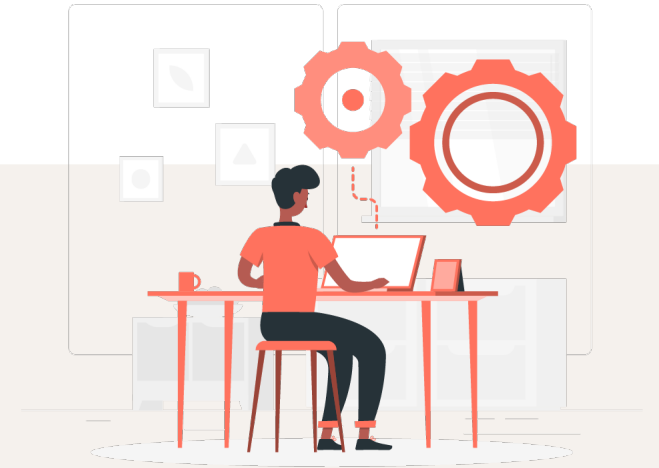
During the implementation, set up a framework for success!



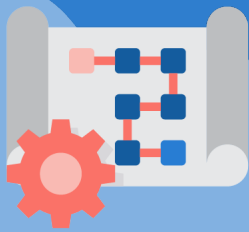
Implementation



SOPs



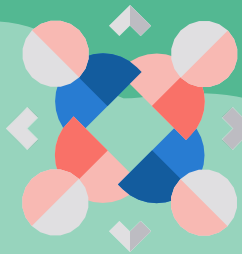
Training



Break and AMS Dear Abby



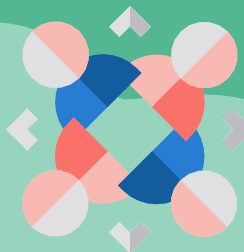
Prepare for Launch



Are you ready?

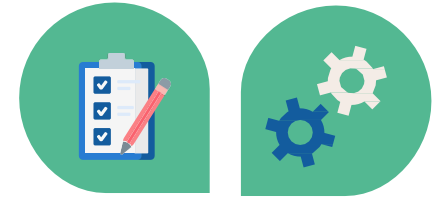


Prepare for Launch



Are you ready?

- Configuration complete?
- Confidence in data conversion?
- Testing complete?
- Staff training?
- SOPs in place?



Nobody remembers that you went live late. Everyone remembers that you went live poorly

Prepare for Launch



• Launch Plans

- Rollout Checklist
- Rollback Plan
- Post-Launch List



**Target
Date**

• Communication Plans

- Implementation Team
- Staff
- Sponsors
- Third Party Vendors
- Members/External Users



Launch Period



It's called Lockdown for a reason.

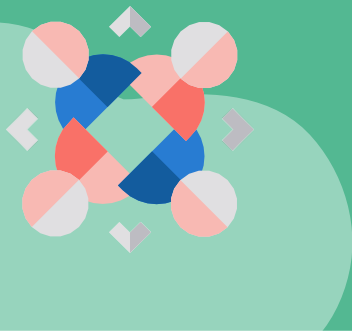
- Staff must complete activities in the legacy system *before* lockdown. This is the last time the legacy system will be used.



Don't be in the middle of a task when the system goes down

- Remind your customers about site maintenance.

Launch Period

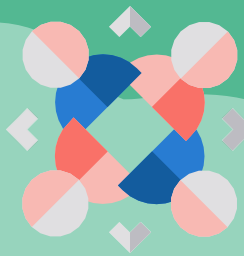


What to Expect?

- “Dark” Period During Final Conversion
- Delays and Hiccups vs. Opportunities to get it right!
- Feedback and some frustration – Confidence issues!
- Communicate, Communicate, Communicate!

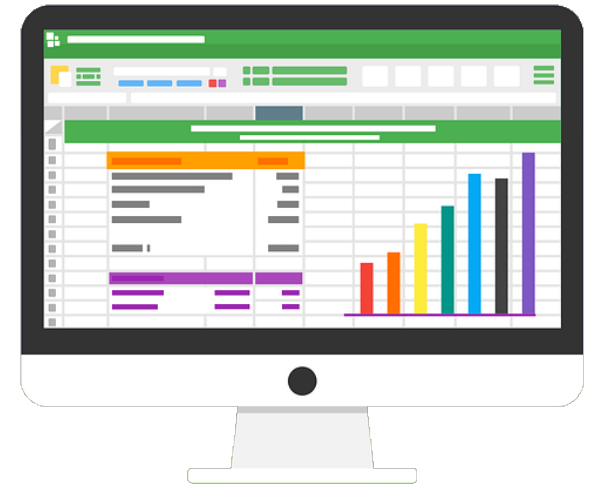
Launch Day

What to Expect



Make the Transition

- “Dark” period during final conversion
- Start with data validation
- No “live” orders until financial reconciliation is complete
- Hand-key data – Final tests in live environment



Launch Day



Make the Transition

- Open your new AMS up to internal users first
- Request business bring their «daily» work
- Open to external users BEFORE making an official announcement
- Partner should be an active participant!
- Don't forget to celebrate

The best day of your old system is the first day of your new system ” ”

Moving Forward

Know what to expect



You're Live, Now What?

- Full of “aha” moments
- Don't expect perfection!
- Ensure team is adopting “good” habits
- Focus on data integrity
- Expect some rework
- Don't expect operating efficiency



Moving Forward

First 6 Months



- Stability
- Data Integrity
- Following the SOPs
- Changing practices to work within the new AMS
- Learning core functionality

It takes 1 full year to settle into your new AMS – plan accordingly

Moving Forward

Balancing the Work



Questions and Small Requests

Upgrades
New
Features

New
Projects



Moving Forward

Keys to Long Term Success



- Embrace the transition to support
- Keep staff engaged
- Leverage your data standards team

**Ensure SOPS are
documented**

**Meet
regularly**

**Hold working
sessions**

- Reinforce “program” or never-ending project methodologies



Road to Success

Discipline
Change
Prioritization
Grace

"Grace means that all of your mistakes now serve a purpose instead of serving shame."

Brene Brown

"Change is Inevitable. Change is Constant."

Benjamin Disraeli

"Motivation gets you going, but discipline keeps you growing."

John C. Maxwell

"Efficiency is doing things right; effectiveness is doing the right things."

Peter Drucker

Charles Darwin

"It is not the strongest of the species that survive, nor the most intelligent, but the one most responsive to change."

Break and Questions



THANK YOU



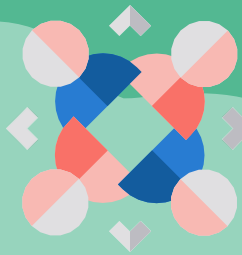
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Please take the post Boot Camp Survey!
<https://bit.ly/Achurch2021NovBootCamp>

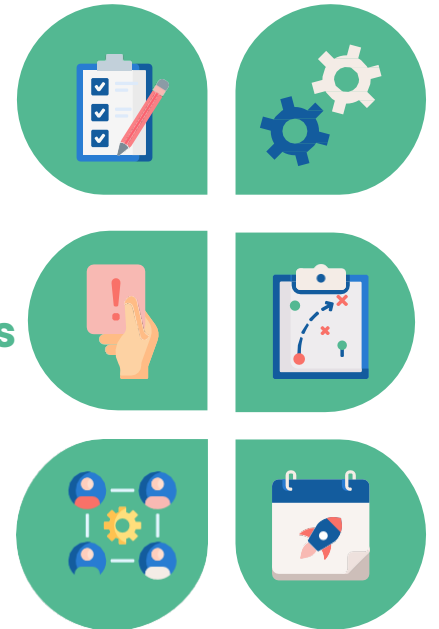
Appendix

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Prepare for Launch

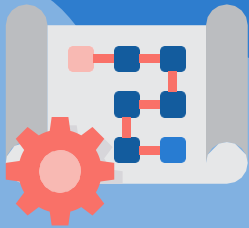


- **Create the Launch Checklist**
- **Final System Configuration & Setup**
- **Create Final SOPs needed right after launch**
- **Have your data conversion smoke testing plan ready**
- **Prepare a communications plan to staff and members outlining the upcoming changes**
- **Ensure all integration vendors have time blocked off for launch.**



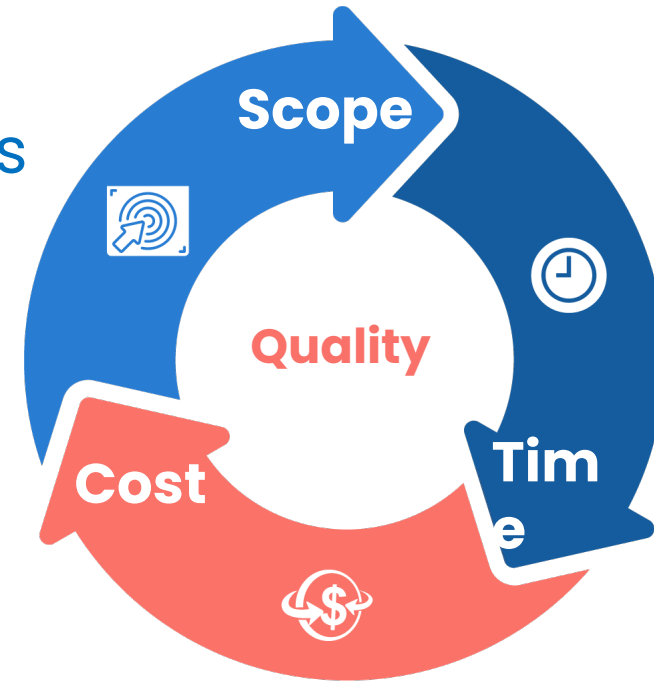
Implementation

Project Constraints



- Acknowledge project constraints
- Configuration vs. customization

Goals and Deliverables



Schedule and Timeline

Financial Constraints