

How to Get Your Board **ON BOARD** When Shopping for an AMS



One of the biggest challenges association professionals face is a lack of forward momentum with their board.



Time and time again, association professionals see their great ideas fall into a black hole of board approval, sometimes never to be seen again — and that couldn't be more true of association management software shopping.

So how can a small-staff association professional with enthusiasm for a new, problem-solving technology work smoothly with their board to decide upon, purchase, and implement an AMS solution all before everyone retires?

Well, it may not be as difficult as you think.

Read on to see for yourself!

Before you do anything – research!

Before going to your board, it's important to conduct some initial research. If you already have a few AMS providers in mind, start there. Otherwise, ask around, run a Google search, or check out a few software directories, such as Capterra. These directories are meant to help businesses and nonprofits find software for their organizations, so they're a great resource to use during this time.

Now there's no need to set up any demos just yet. Just gather enough information to be able to answer any basic questions that your board members may have, such as how much AMS solutions typically cost, what's included in that price, etc.

Remember, the more prepared you are for this meeting, the better it will go.



OK, time to approach your board

When it comes to approaching your board, we recommend structuring your presentation in the following order:

1

Highlight the flaws in your current system

Start your presentation off by highlighting the pain points you feel with your current membership management system. Whether you're utilizing a file cabinet, a spreadsheet, or even an AMS that doesn't quite cut it anymore, take some time to talk about the various hang-ups that your staff members deal with on a regular basis. More importantly, talk about what you could be doing if you weren't having to deal with those hangups. For example, if you weren't having to spend so much time manually sending out dues reminder emails, you could be spending more time recruiting new members for your organization.

2

Explain what an AMS actually is (in simple terms)

The concept of an AMS can sometimes be hard to grasp. Now you don't want to get into too much detail here, but it is important to lay out some of the primary functions typically available in AMS systems. If you need help having that conversation with your board, check out our guide, **What Is An AMS?**

OK, time to approach your board

3

Explain how an AMS can solve your current problems

Ok, time to connect the dots. Bring up the pain points you mentioned in step one and the features you highlighted in step two and tie them all together. More importantly, talk about how an AMS can free up a lot of your time, giving you extra hours in the day to focus on more important matters, such as recruiting new members and increasing retention rates. To really drive your point home, mention other associations that are successfully using AMS solutions. After all, that could be you.



Talk numbers

This is where your board members' ears will really perk up. Remember that research we were talking about earlier? Well this is where it's really going to come into play. Be prepared to talk about price ranges and, more importantly, limits, as this will often dictate the remainder of your shopping process.

4

Get approval on the shopping process

Fingers crossed! Now you just need board approval. Based on the numbers you just talked about, see if it's ok to move forward with the AMS shopping process.

5



Report back to your board

After your demos, go back to your board members and explain what you learned.

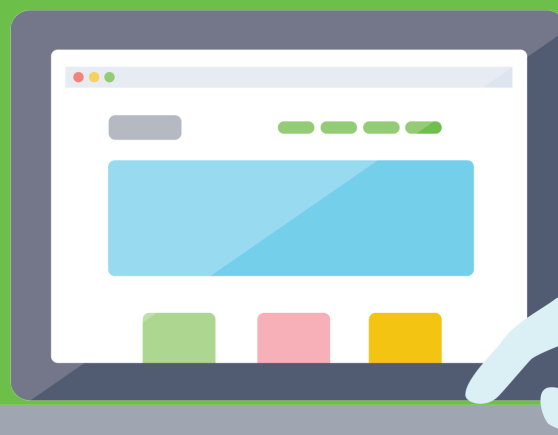
Introduce your favorite AMS solution and talk about it from a benefits standpoint. Sure, you'll need to mention some of the product's features, but focus more on how it will solve your staff members' problems and free up a lot of your time. This is also a good time to collect any follow-up questions that your board members may have.



Do a demo with interested board members (if necessary)

For some associations, this step may not be necessary. But for others, it may be absolutely crucial. After all, this is a big purchase for your organization — you want to make sure everything is perfect. Find out if any of your board members want to sit in on a second demo with your possible AMS

providers. If so, be sure to prep them by explaining what they can expect on the upcoming call. And don't forget your list of followup questions!



Ready to make a selection?

Time for all that hard work to pay off! If you and your board have landed on an AMS provider, give them a call and get started on your path to improved communications and problem solving!

Is your board on board, but you're still struggling to find an AMS?

Not to worry! Check out our free **Buyer's Guide to Selecting the Right AMS** here!



◀ Click here to check it out!

More about MemberClicks

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