

 #AFNC16



Associations Forum National Conference

4th – 5th July 2016



6C System Selection: What you Need to Do to Make an Informed Choice

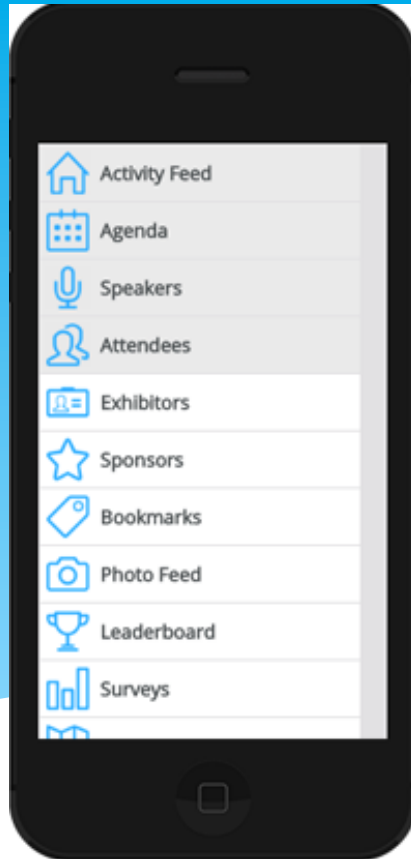
Associations Forum Conference App

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6C: System Selection

What you Need to Do to Make an Informed Choice
Associations Forum National Conference 2016

John Walker

Introduction

- Over 30 years in the IT Industry
- Referred into AIPM in 2012 to implement a new AMS*
- Since 2012 the Association Sector has been my sole focus
- Member of AIPM, AIPM PM Certification
- Gained working exposure to over 6 AMS products
- Independent consultant => COTIQU

Presentation format

As per the program, this presentation is in three parts:

1. Common mistakes that associations make when starting the search for a new system
2. Defining the requirements and questions to ask
3. How to run the selection process

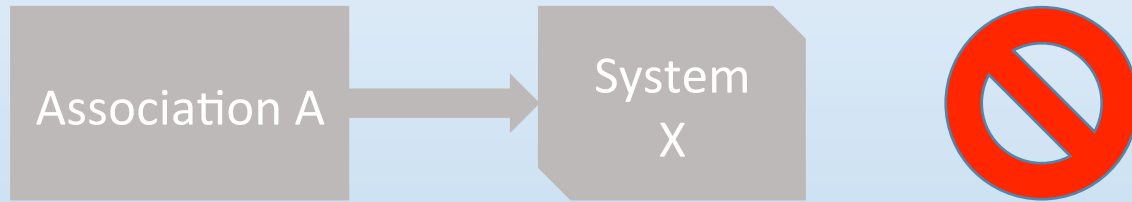
Questions are encouraged throughout at any time.

Part 1: Common mistakes

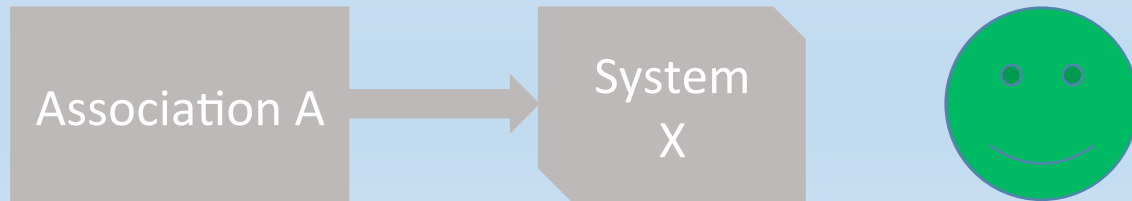
- At some point an association decides it is time to go to market and select a new AMS
- Right from this point, whether you know it or not, you are setting the stage for success or failure, even before you pick a vendor

Part 1: Common mistakes

A hypothetical scenario:



Second go:



Part 1: Common mistakes

The significance and importance of the selection process

- The outputs of the selection process feed directly into an Implementation Project
- The outputs from the selection process directly impact the success of the implementation



- What outputs?

Part 1: Common mistakes

The project triple constraint

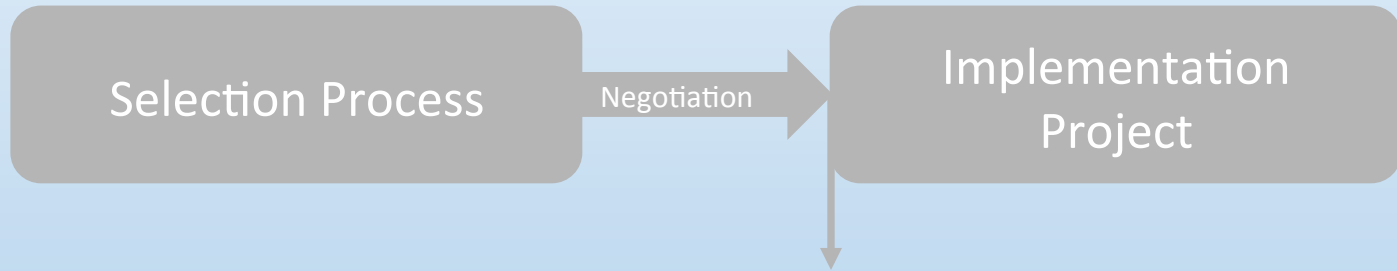


Based on a true story for sure



Part 1: Common mistakes

- At the point you sign the contract, you should have defined your three constraints and your project framework defined



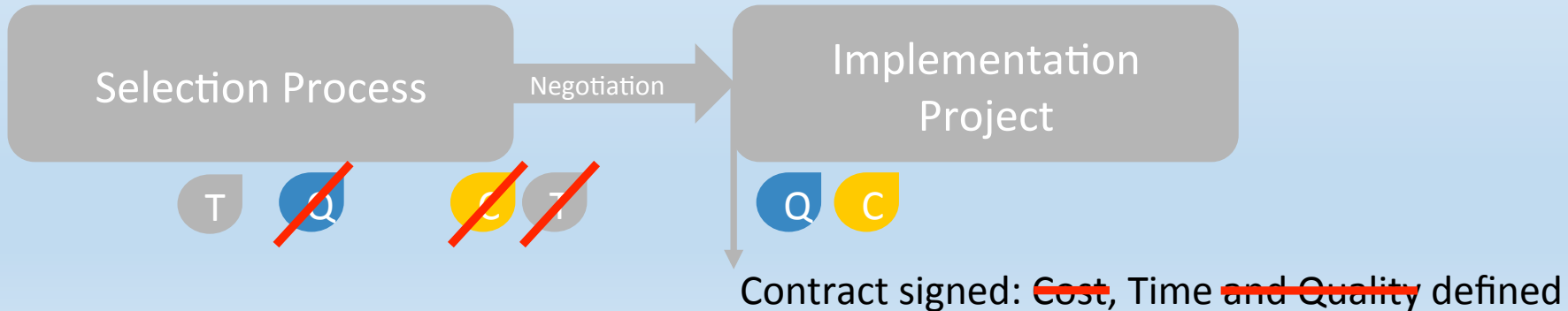
- But in what order?

Contract signed:
Cost, Time & Quality defined

Part 1: Common mistakes

Order like this:

1. Quality. Define requirements first. All of them
2. Cost. Cost of the project, not the vendor's cost
3. Time. Set in agreement with your preferred vendor



Part 1: Common mistakes

What if your implementation is in trouble?

BEWARE THE PRESSURE OF THE EXPECTED DELIVERY DATE

Part 2: Defining Requirements & Questions

What screws us up the most with selecting new systems is the picture in our head of how they are supposed to be.

Part 2: Defining Requirements & Questions

Set your expectations Day 1:



- There is no one “best” AMS. There is only the most appropriate AMS for your requirements against what you can invest
- Whichever AMS you pick, there will be something it will not do as you expect. You need to know about these before you commit. Unset expectations can (and do) derail AMS implementations

Part 2: Defining Requirements & Questions

Some Day 1 considerations

- Prioritise your requirements on your Members
- Focus on business Needs, not personal Wants
- Test your requirements for business benefits
- Don't restate what you currently do without first thinking about possible simplifications or improvements
- Consider what operational impacts a new system will bring, especially if you are federated
- Consider staged deployments of requirements to mitigate risk

Part 2: Defining Requirements & Questions

Some Day 1 considerations (cont.)

- Define systems/functions in scope, systems/functions **not** in scope
- Define your project team, you need respected business representatives from each group (E.g.: membership, events, marketing, training)
- Your project team must be decision makers
- Your project team must have time for the project
- Identify key Risks and Issues
- Identify periods you cannot go live in (E.g.: peak renewals, national conference)

Part 2: Defining Requirements & Questions

Requirements consist of two distinct components

- Non-Functional
- Functional

Part 2: Defining Requirements & Questions

Non-Functional Hot Topics

- Data storage location and backup location
- Browser support and versions, responsive support
- Dev, Test environments
- Hosting costs (non-SaaS)
- CMS requirements. Publish Test to Prod, 3rd party design access
- Ask for contract (during RFP or later in negotiation): Rate card and rate increase rules, RPO and RTO, SLAs, Issue fix policy, termination, indemnity, travel expenses, IP protection, Data ownership, then all the lawyer interesting stuff
- R&D policy
- User Group

Part 2: Defining Requirements & Questions

Functional Hot Topics

- Membership complexities, parallel memberships, monthly payments
- Member directory
- Table bookings, Event Group bookings
- Conference support
- Segmentation of website content based on membership level
- Email marketing
- Interfaces into Finance packages
- Interfaces into LMS'
- Website included or separate
- CMS technology

Part 3: How to run the selection process

If there is no authority or no
commitment or no drive from the top,
then don't start.
Don't waste the vendor's time.

Part 3: How to run the selection process

- Define all of your requirements first, before you contact any vendors
- Identify suitable vendors
- Issue a formal invitation to all, along with your requirements, and do it at the same time
- Be prepared for unsolicited contact, they will want to assess your commitment, cosy up and make friends
- If you have an incumbent, consider inviting them too

Part 3: How to run the selection process

- Give them enough time to respond (around 5 weeks)
- Be clear on the submission close date
- Be clear on how you expect them to respond
- If an error or omission is identified, notify all
- If a vendor asks a question that has a material impact, notify all
- Use a quantitative assessment process

Part 3: How to run the selection process

- Review submissions and reduce to a shortlist
- Invite the shortlist to present, focusing on key functional areas
- Introduce the CEO, demonstrate commitment
- Evidence how you selected the preferred vendor
- Consider holding a second preferred vendor in waiting
- Provide feedback to the unsuccessful contenders and remember to thank them for their efforts

Part 3: How to run the selection process

When you sign the contract, you are entering into a marriage. You and your new partner must do everything possible to make it work.

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THE END

Thank you