501 WORKS & PERBYTE

*present*

**June 4, 2024**

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# Our Facilitators

## OLIVIA WILKINS

Business Analyst / Project Manager, PerByte

**Olivia** joined PerByte after working at two associations where she facilitated end user training, delivered business and process analysis, and provided data management during their Aptify implementations. Before joining the world of associations, Olivia taught a variety of grade-school subjects and undergraduate coursework where she honed her craft evaluating how people learn and engage with systems, processes, and environments. She combines two decades of experience in education, change management, and analytics to improve user adoption and foster strong relationships between technical and non-technical stakeholders.

## JAMES MARQUIS

Chief Information Officer, 501Works

**James** is a seasoned senior executive with more than 20 years of experience working with associations and non-profits of all sizes. James possesses excellent communications skills allowing him to function as a trainer, technology evangelist and to bridge the divide which frequently exists between functional business units and information technology specialists. Coupled with his ability to deep-dive into technology, these key skills allow James to operate across department lines and organizational levels to better integrate technology with the strategic and tactical needs of an organization.  Plus, he has attended every AMSFest since Teri founded it in 2016.

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# Before you go...

- What to expect at AMSFest?
- Know yourself – be prepared!
- What are your pillars for success?
- What makes you weird?
  (In a good way!)
- Who to bring with you?
- How to get the most out of demos.
- Stay organized – the Demo Tracker
- Its not just a vendor dance!
- Make some association friends.
- 2023 Selection Survey Insights

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# What to Expect at AMSFest?

- It is a packed few days so be prepared for a lot of information coming at you.
- The pre-sessions offer great advice for tackling these projects.  Take advantage of them.
- Don’t be afraid to grab people between sessions – vendors and consultants have down time and are happy to talk with you.
- Tap your cohort leaders for free advice – them all been down this road a few (hundred) times!

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# Know Yourself – Be Prepared!

- There are a wide range of solutions available at AMSFest
- Knowing where you fit in the mix will save yourself and the vendors time and energy.
- A few key things to have at the ready:
  - Annual budget
  - Staff Size
  - Member Size
  - Type – Professional, Trade, Hybrid
  - Search Timeframe

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# What Are Your Pillars for Success?

- What drives your association?
- Knowing where your association is most active will help drive the key things to focus on – usually 8 to 12 key items.
- Sample:
  - Finance
  - Member Self Service
  - Membership
  - Small Events & Webinars
  - Committees
  - Journal/Magazine Subscriptions
  - Tracking CPE Awards
  - Email Newsletters
  - Grassroots Advocacy

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# What Makes Your Weird (In a Good Way!)

Every group has a few (or more) things that make them special…

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# Who to Bring With You?

- Getting a wider audience to review solutions can give you valuable perspective.
- It can be a great way to get your team engaged in the project.

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# How to Get the Most Out of Demos

- There is a great line-up of different solutions.
- Vendors are happy to field questions but be respectful and do not get down in the weeds with problems you are currently having.
- Be sure to do a little homework before you go and target solutions that are good fits based on size/budget/functionality.

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# Stay Organized – The Demo Tracker

- Demos are hard to keep straight!
- We have an easy-to-use tool that lets you record your notes and stay organized.
- Visit 501Works to download the PDF.

# Its Not Just a Vendor Dance!

There are great consultant and industry partners with years of experience in tackling these sorts of efforts.

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# Make Some Association Friends

- These projects are big in scope and can be hard to execute.
- You are not alone!  Buddy up and stay in touch with folks you meet.
- Reach out if you have questions or hit a roadblock!

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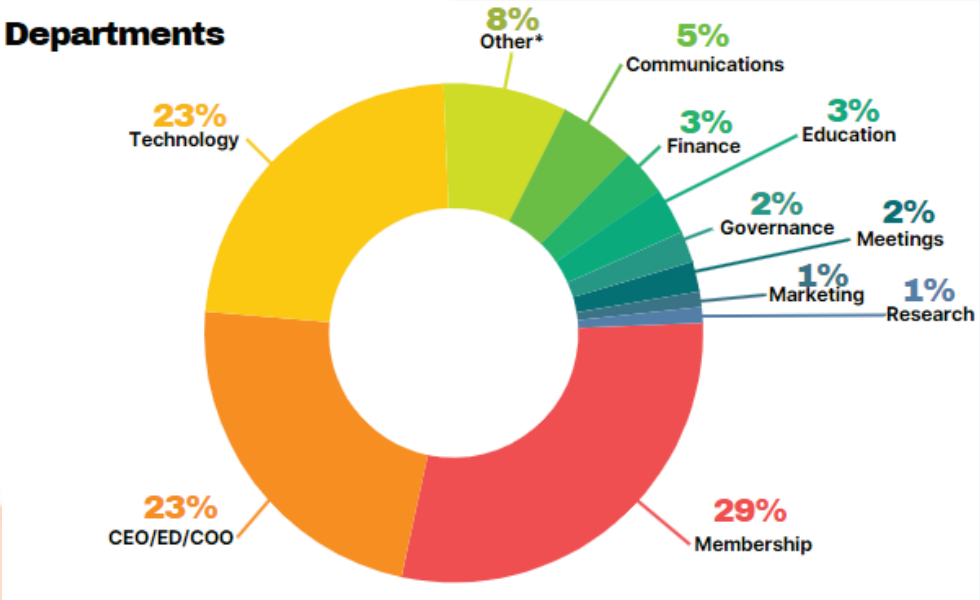
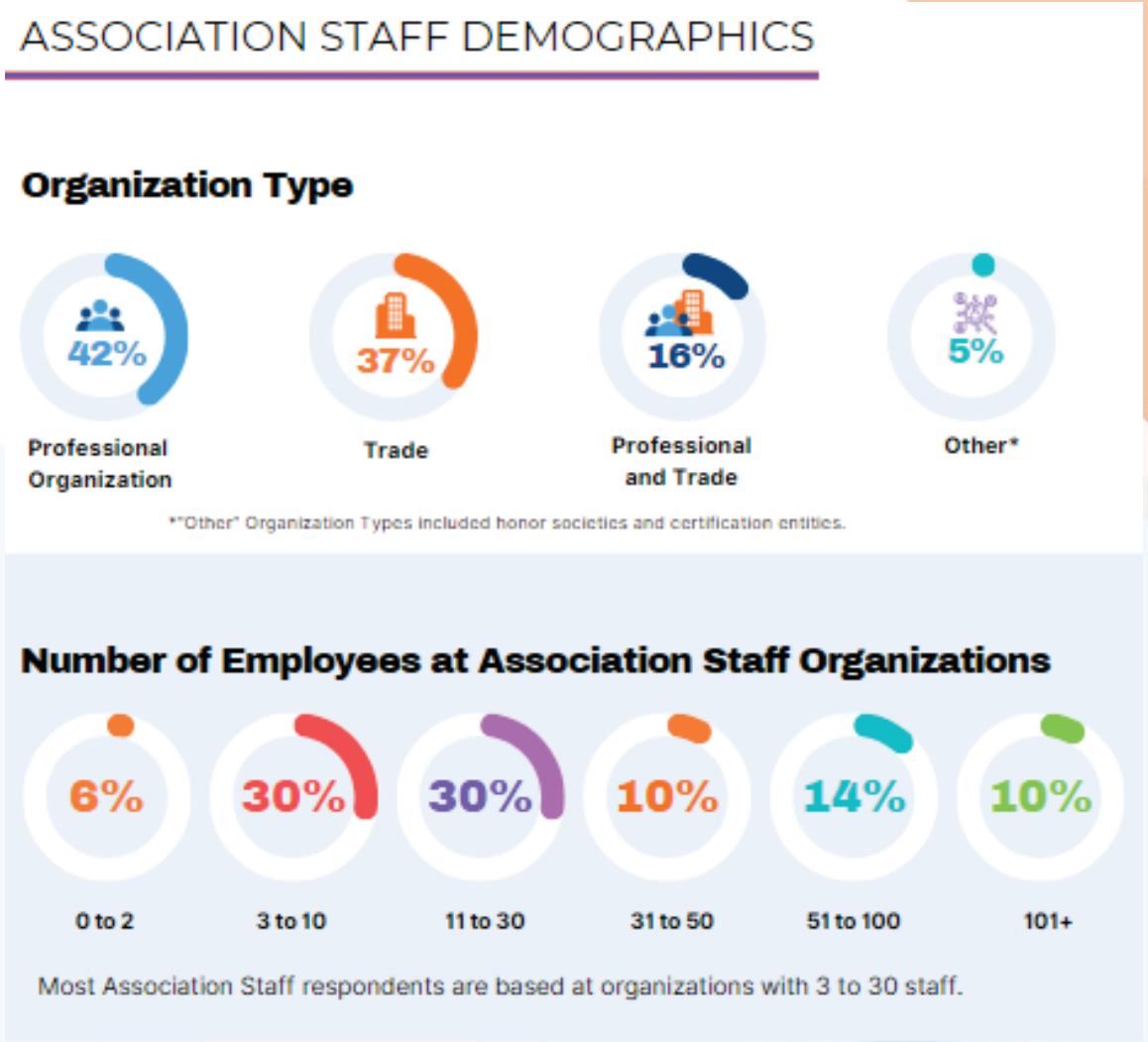
# 2023 Selection Survey Insights

Within association responses we got a good mix of staff sizes and departments and org types

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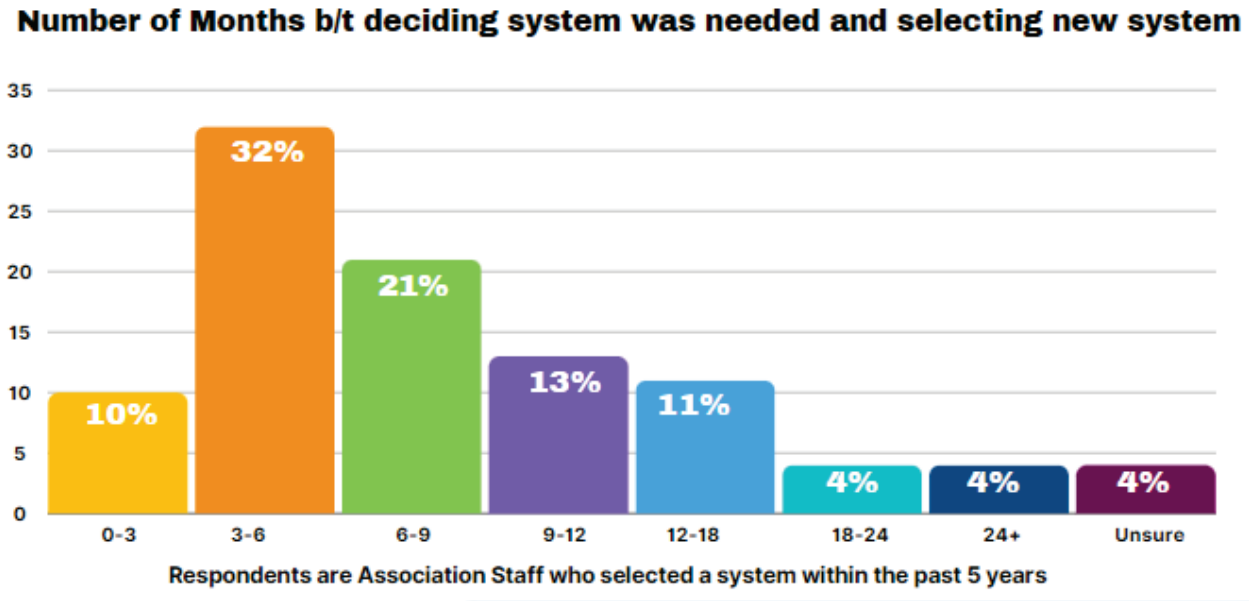
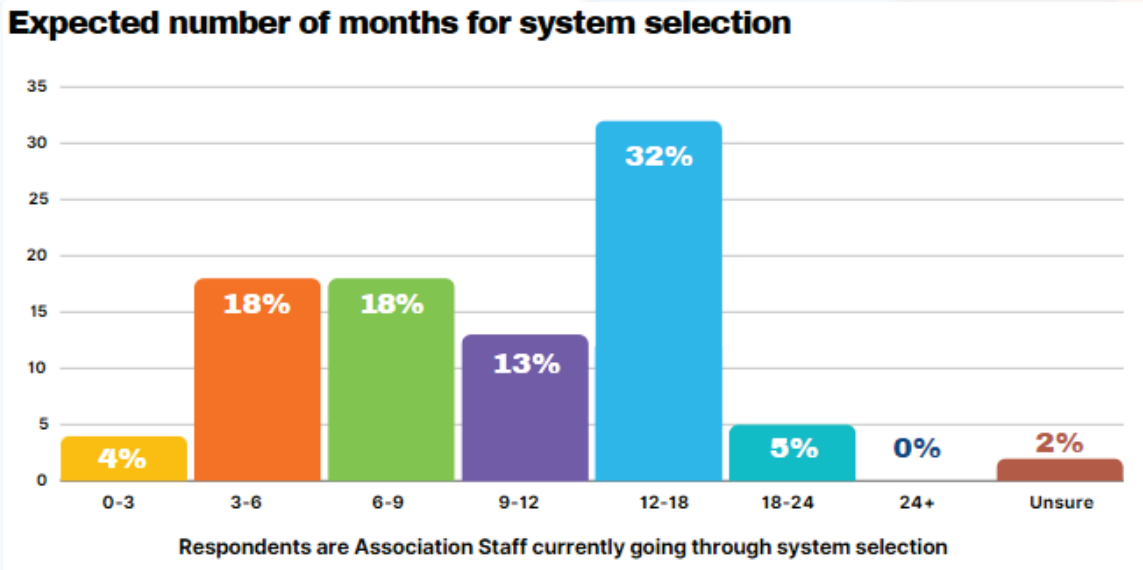
# Actual projects take longer than expected




Looking at selection:

- Some said they were able to do it in 3 months
- 19% took longer than a year

## Selection

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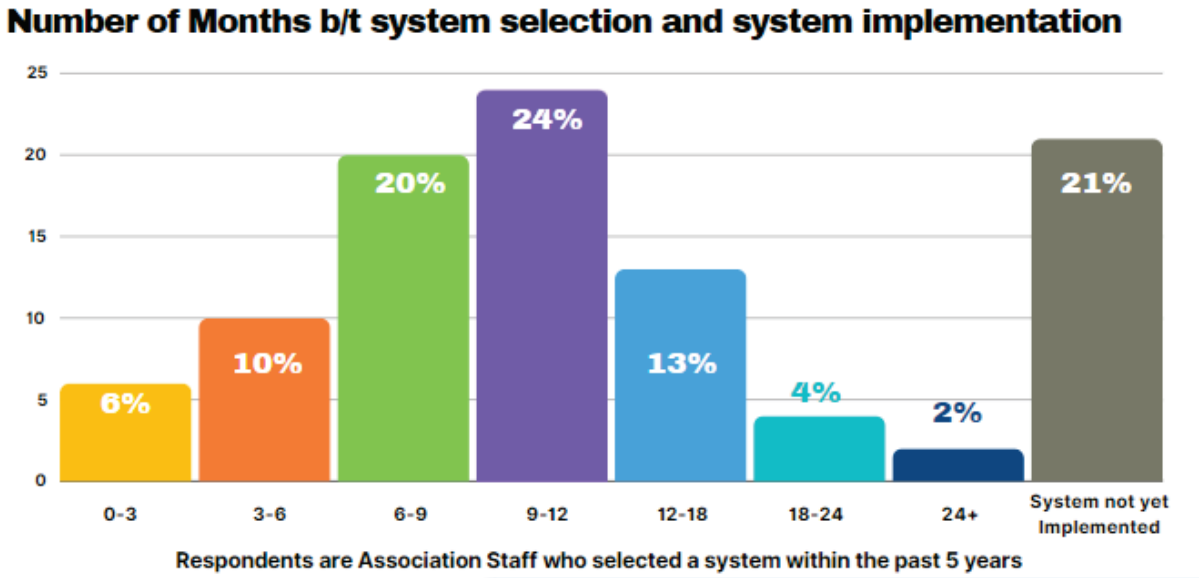
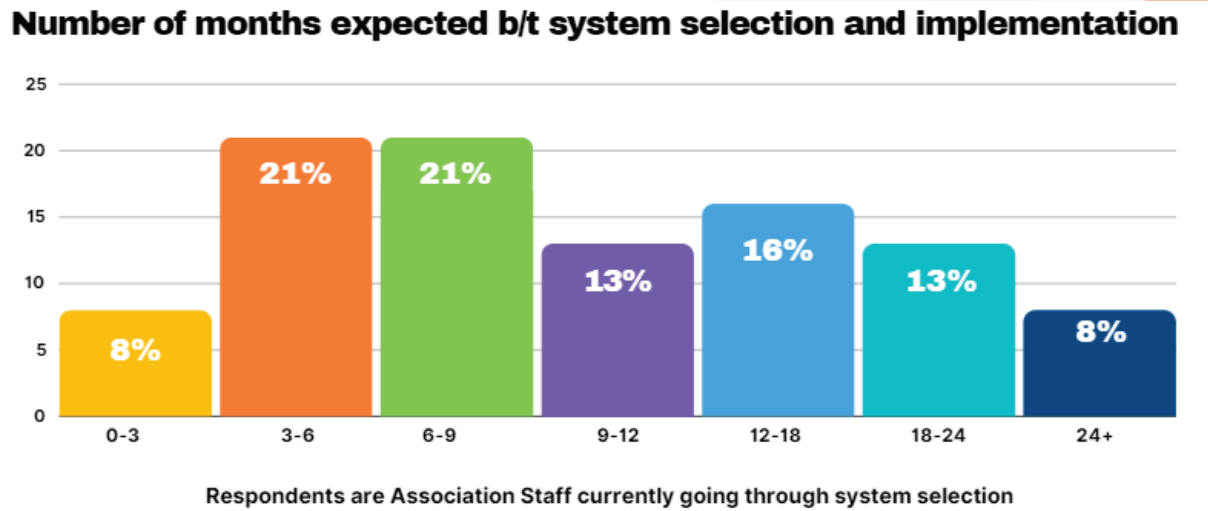



Looking at selection:

- 6% of respondents said they were able to do it in 3 months
- 19% took longer than a year




# Implementation

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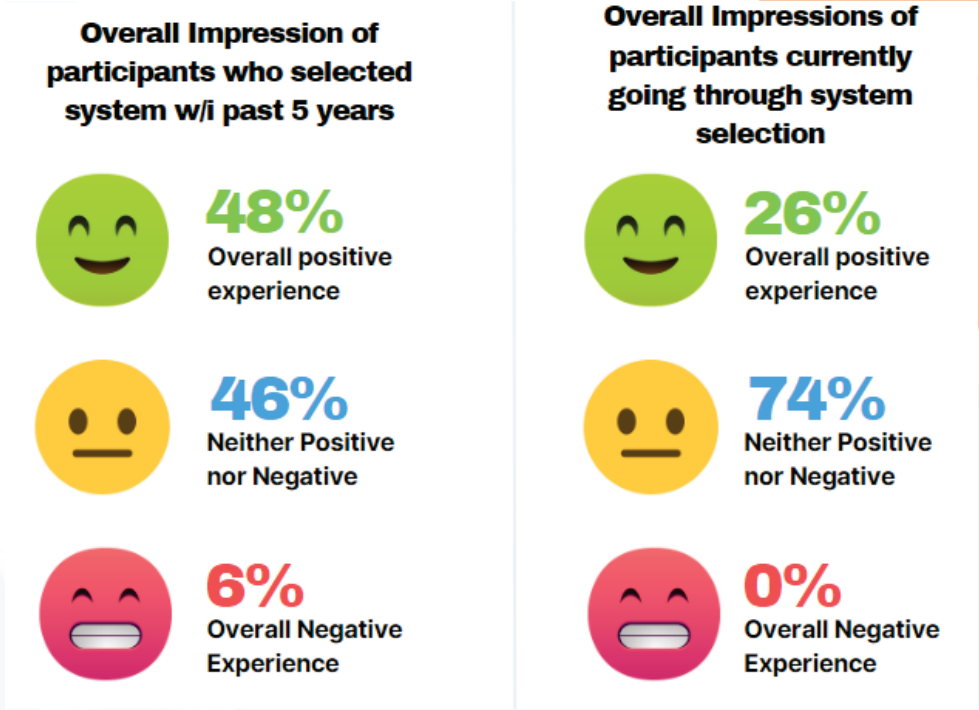
# You will survive (and hopefully thrive)!

- We perceive the process to be worse than we remember it long term.
- Consultants are fairly happy…
  6% (-) / 63% (n) / 31% (+)
- Vendors have the most negative views…
  26% (-) / 30% (n) / 30% (+)

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# Thank You!

**501Works™ LLC**

- IT Consulting Services – vCIO Service
- Software Selection & Implementation Services
- Customized Software Solutions and Integrations

https://501works.com

**PerByte**

PerByte offers a range of services from customized development, future phase initiatives, implementations, upgrades to business intelligence, ongoing support, and training to move your organization forward.

https://www.perbyte.com/

**GIVE A REVIEW. READ REVIEWS.**

Utilizing a community driven approach, ReviewMyAMS provides you with a platform where you can share your own insights, learn from unbiased reviews, and make informed decisions about selecting your next AMS.

https://reviewmyams.com

**Software Mage™**

A growing collection of resources and tools to help your association add a little expertise to your software projects no matter where you are in the journey.

https://www.softwaremage.com

**Mojo Middleware™.**

Easily integrate your different association software packages with over 40 available connectors.

https://mojomiddleware.com

**The CIO Hour**

Not a tech type but have tech questions that you need answered? Join us for The CIO Hour – designed specifically for non-tech association staff to boost their IT-IQ. Ask your technology questions and get them answered by an experienced CIO and a crew of industry experts in a safe, casual environment.

https://www.theciohour.com

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# Please tell us what you think…

**https://www.surveymonkey.com/r/June2024AMSFestBeforeYouGo**

**We love feedback!**

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