Welcome to the CIO Hour!

June 2023

AMS or CRM?
A Candid Conversation

Today's Panel

JENNIE KOSS
Senior Consultant, Cooper Consulting, Inc.
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Jennie Koss has 25+ years of experience in technology and business consulting for associations and is one of the founding member of the Cooper Consulting, Inc. team. She has effectively managed technology assessments, system selections, software implementations, IT staffing studies, system upgrades, and software integration projects for associations. Jennie holds a BS degree in engineering from the University of Virginia.

MOIRA EDWARDS, MS CAE
President, Ellipsis Partners
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Moira Edwards focuses on the impact of technology on organizational strategy. Ellipsis Partners works exclusively with associations and non-profits on technology assessment, digital strategy, and system selection and implementation. She is a co-founder of AWTC, Association Women Technology Champions. She volunteers with ASAE and was the 2017 Chair of the Technology Council. Hailing from Dublin, Ireland, she holds a BA in Business & Economics, an MS in Psychology, and is a Certified Association Executive (CAE).

WES TROCHLIL
Founder EDM – Effective Database Management
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Wes Trochlil, is an award-winning consultant, and the most published author on data management in the association market. For nearly 35 years, Wes has worked in and with over 250 associations, non-profits, and membership organizations throughout the US, Canada, and Australia. Wes helps organizations select and implement data management systems, advises clients on how to use the database and data for improved marketing and communications, all while advancing the organization's mission.

JAMES C. MARQUIS
Chief Information Officer, 501Works
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James C. Marquis is a seasoned senior executive with more than 30 years of experience working in technology with a wide variety of associations and nonprofits. James' work experience includes serving as CIO for a large medical association, CEO of a technology consulting organization and senior roles in product development and business consulting with for-profit and nonprofit clients. He also has designed and built multiple Internet-based business applications including Mojo Middleware™.

The CIO Hour: AMS or CRM? A Candid Conversation

- Tackling the problems and questions that are on your mind with real-world technology advice

- Featuring experts in their field with decades of real-world experience

- Usually the first Thursday of every month

Visit www.theCIOHour.com for upcoming topics and events.

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Ground rules…

- No question is off limits!

- If the question is too specific to a particular situation, we may defer it but are happy to talk to you offline or after the event.

- This is a safe space, but we understand if you wish to remain anonymous.

- Each session is worth 1 CAE credit – details to claim emailed tomorrow

Agenda

- In the News – A few highlights that might interest you

- Fast Facts – Introduction to the topic of the month

- Q & A – 40 min – Discussion with our experts and taking your questions

- The CIO _after_ Hour – 30 minutes of open mic discussion

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In the News…

1. 501Works Acquires ReviewMyAMS

   https://www.501works.com/501works-acquires-reviewmyams/

2. Microsoft: Your business really needs to step up its email protection, and here's why

   https://www.techradar.com/news/microsoft-your-business-really-needs-to-step-up-its-email-protection-and-heres-why

3. How to talk about A.I. like an insider

   https://www.cnbc.com/2023/05/21/ai-glossary-how-to-talk-about-ai-like-an-insider.html

4. Best free PDF editors 2023: Our top picks

   https://www.pcworld.com/article/702374/best-free-pdf-editors.html

REVIEWMYAMS

Give a Review. Read Reviews.

Tap into the association community's power to find your perfect AMS/CRM solution. Experience the potential of ReviewMyAMS platform, a renowned platform specializing in Association Management System reviews.

Submit a review to:
• Share your valuable insights
• Learn from unbiased and authentic reviews
• Explore vendors of interest
• Make well-informed decisions for your next AMS or CRM

CIO Hour Participants: Submit a review by June 30 to be entered into a drawing for a **$100 Amazon gift card.**

Today's Topic:
AMS or CRM?
A Candid Conversation

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Bard results for "*should an association buy an AMS or a CRM?*"

Whether an association should buy an AMS or a CRM depends on the specific needs of the association. Here are some factors to consider when making the decision:

- Size of the association: Larger associations may need a more robust system with more features, while smaller associations may be able to get by with a simpler system.
- Budget: AMS and CRM systems can range in price from a few hundred dollars to several thousand dollars per year. Associations should choose a system that fits their budget.
- Specific needs: Some associations may need a system that can track membership dues, while others may need a system that can help them manage their event registration. Associations should choose a system that can meet their specific needs.

In general, AMS systems are better suited for associations that need to manage the day-to-day operations of the organization, such as membership management, event registration, and online learning. CRM systems are better suited for associations that need to manage their relationships with members and other stakeholders, such as donors, sponsors, and partners.

Some associations may choose to use a combination of an AMS and a CRM system. This can be a good option for associations that have a wide range of needs.

On to Your Questions...

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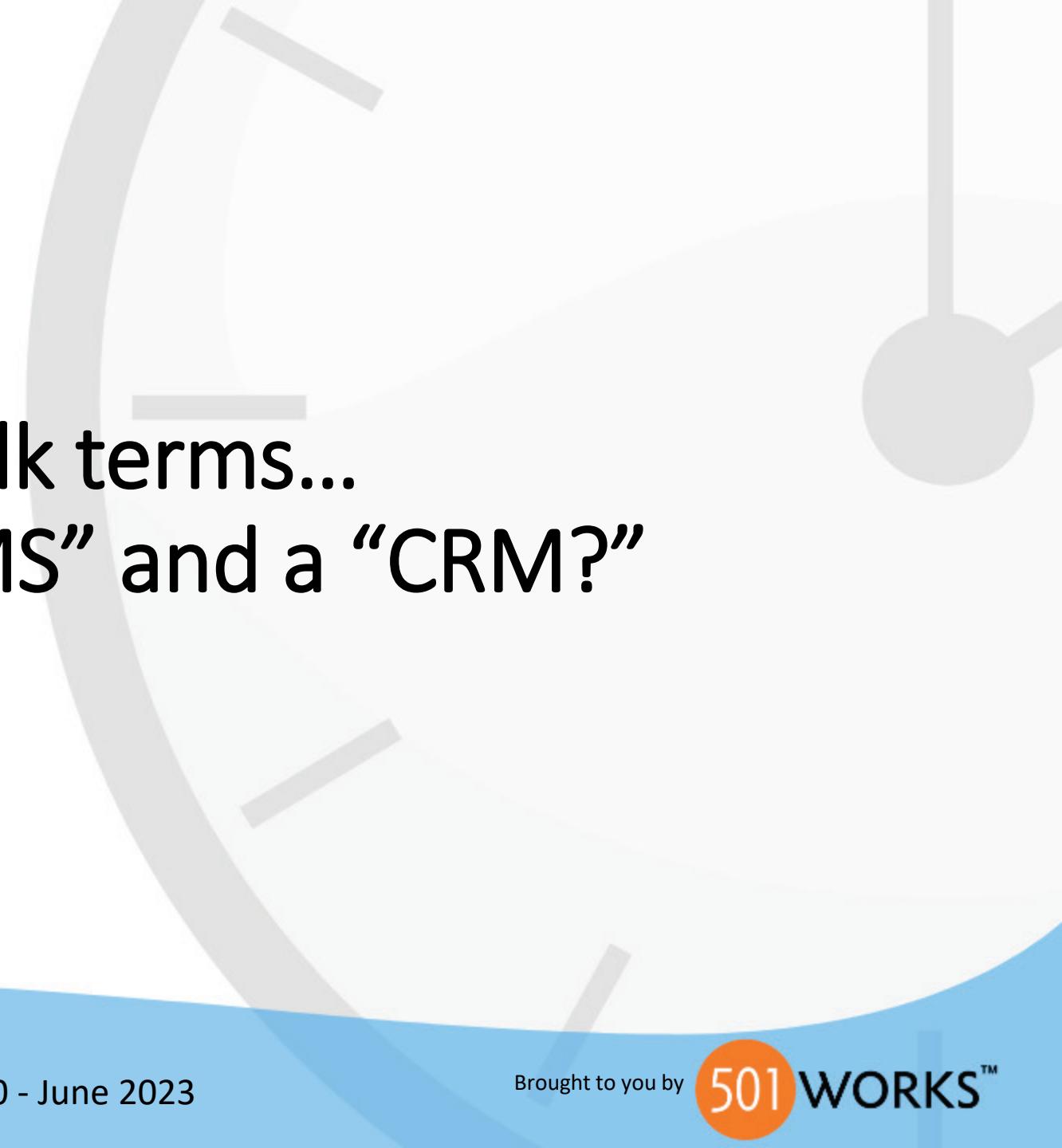
Let's talk terms...
What is an "AMS" and a "CRM?"

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Source:

COOPER CONSULTING

Association Management System

- Robust association management functions (e.g., membership, accounting, events, certification, etc.)

- Major focus on transactional interactions, e-commerce, connection to payment gateway; functions as A/R sub-ledger for the association

- Major focus on customer engagement activities specific to an association

- Implementation managed by product vendor (or managed small community of VARs)

- Feature releases specific to association community needs

- Ability to customize for the specific association needs (but can lead to version issues)

- API for integrating with other third-party products, especially those common to non-profits

- Management of customer touch points and leads tends to be simplistic

- Report/query tools and canned association 'starter' reports (including financial reports)

- Limited labor pool of developers with product familiarity (niche product)

Customer Relationship Management (CRM) System

- Underlying CRM platform is big tech product (e.g., Microsoft Dynamics, Salesforce, NetSuite, etc.)

- Consistent UI, with massive R&D toward worldwide usability and adoption

- Limited 'out of the box' financial features (although 'starter packages' of configurations can be purchased)

- Robust data presentation features – highly configurable and visual

- Access to an industry ecosystem with thousands of 'plug and play' integrations (app store mentality)

- Robust configuration management possibilities for a trained administrator (and training)

- Mobile presentation (responsive design)

- Quick pace of new features and innovation (defined releases)

- Implementation managed by third party consultants and/or internal resources

- Customer responsible for building out the product to meet association management needs

Source:

Hybrid Approach: The AMS Product is a Managed Package of Configurations that Sits Atop the 'Vanilla' CRM Offering, Specifically Designed for Non-Profits

AMS VENDOR

Association and Financial Functionality
- Membership/Dues
- Accounts Receivable
- Event Management
- Product/Publication Sales
- Certification/Accreditation
- Subscription Management
- Fundraising
- Public Facing Portal/E-Commerce UX

CRM VENDOR

CRM Capabilities – Platform 'Basics'
- Account and Individual Records
- Relationships
- Contact Management
- Security Management
- Reporting
- Dashboards/Analytics
- Mobile Capability
- Leads Management
- Workflow/Process Builders
- Development Tools (Objects/Forms)
- API

Established Connectors in Vendor Marketplace

mailchimp   GoToMeeting   Constant Contact

zoom   SurveyMonkey

...and thousands of other apps
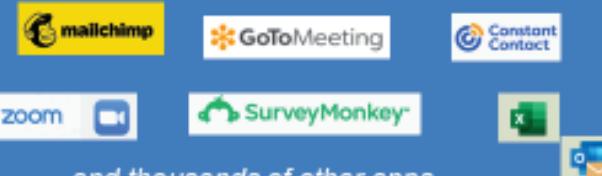
Optional Vendor Cloud Products (Additional License Fees)
- Marketing Automation
- Service Center
- Sales Center
- Communities

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Does it matter if I get an AMS or CRM?
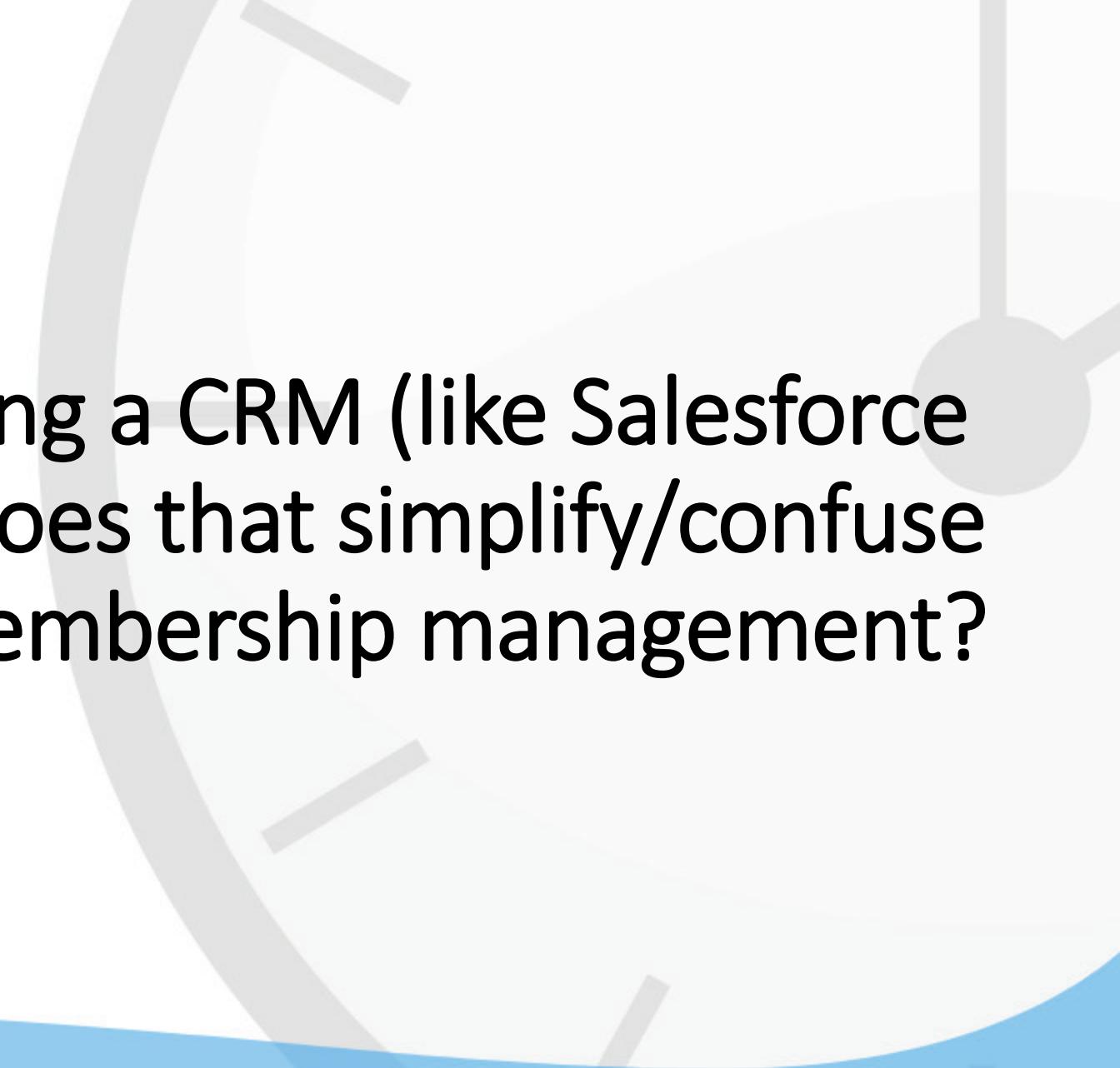
If an org is already using a CRM (like Salesforce for Nonprofits), how does that simplify/confuse decision making on membership management?

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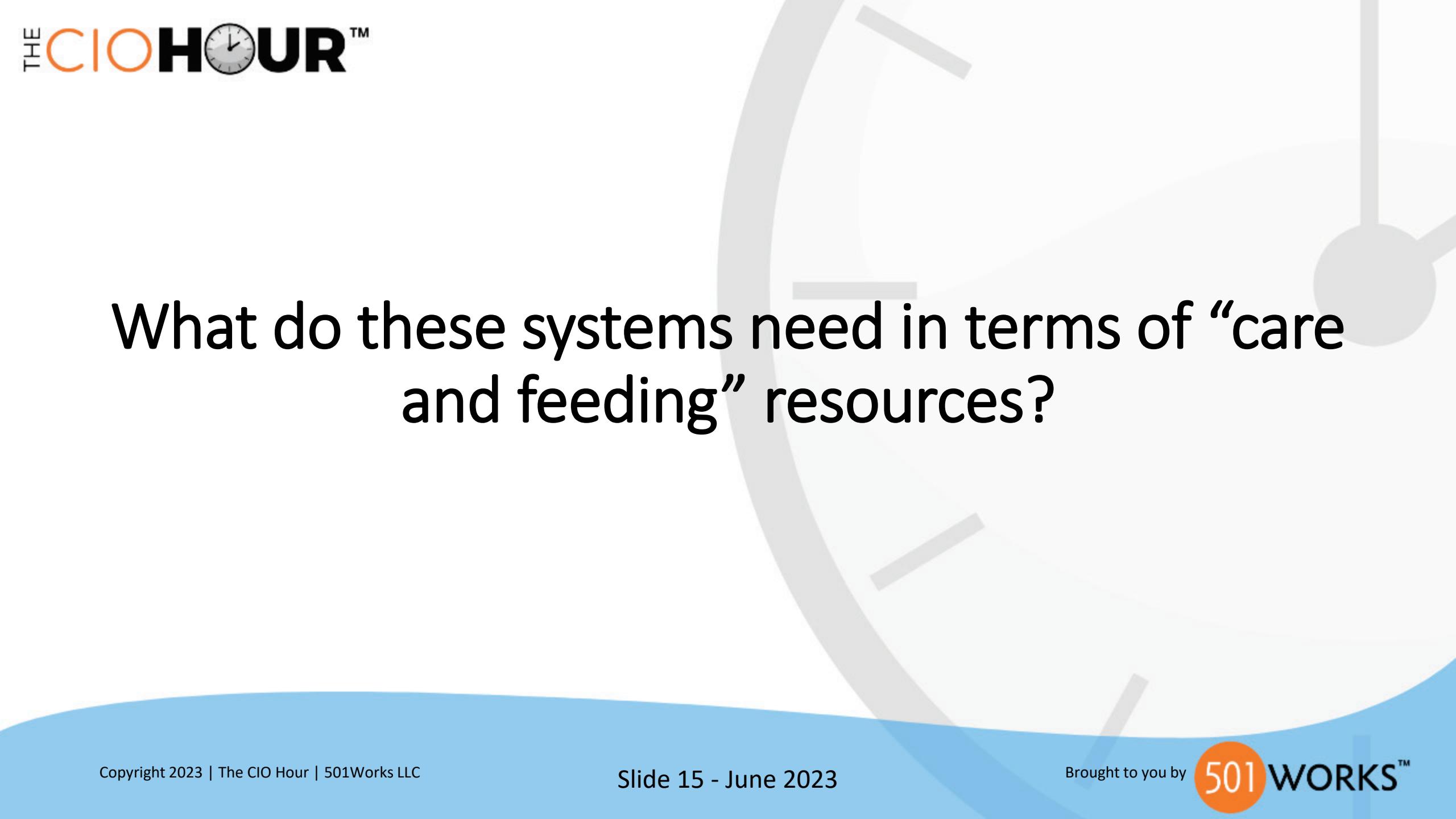
What do these systems need in terms of "care and feeding" resources?
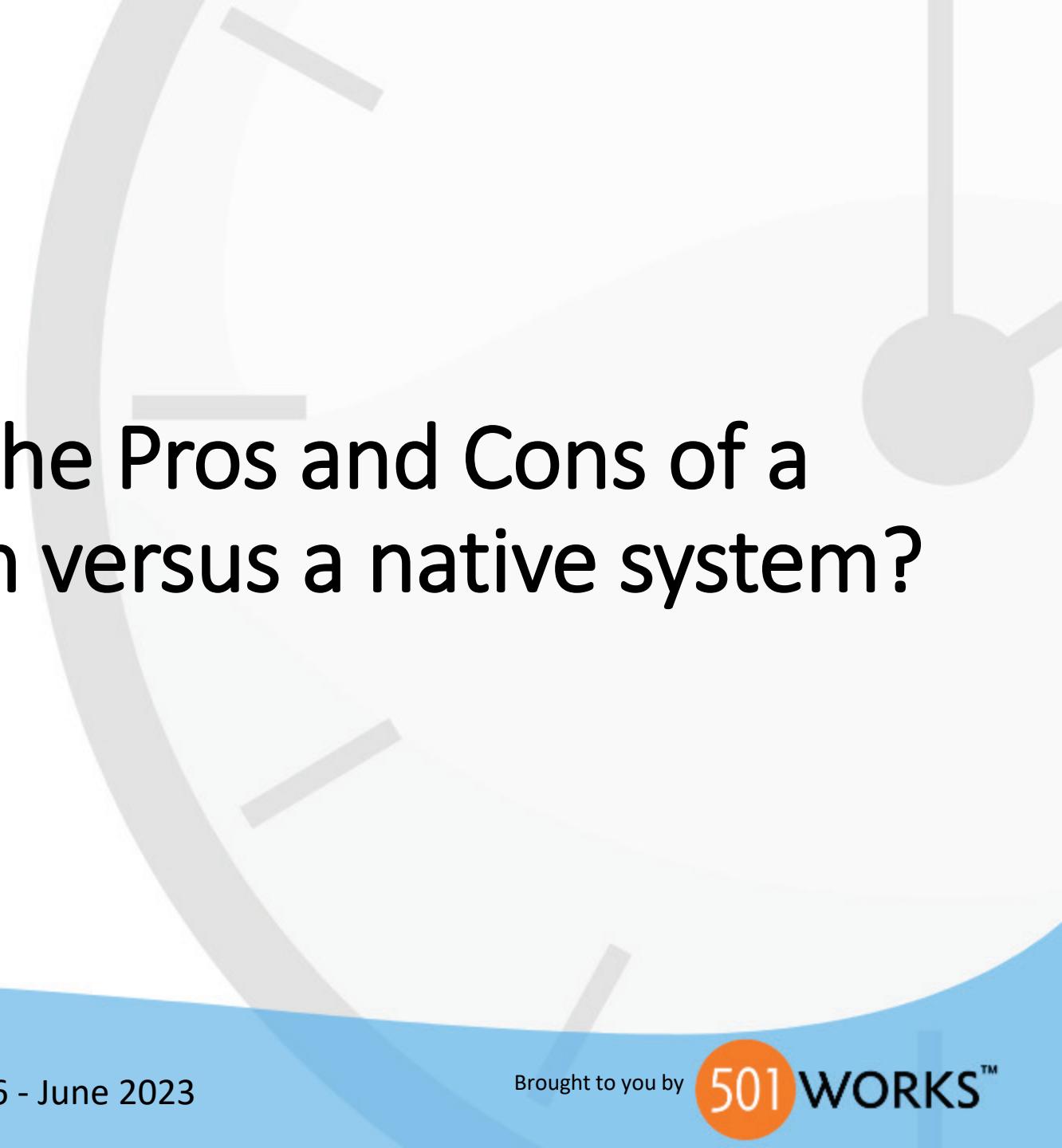
What are some of the Pros and Cons of a platform-based system versus a native system?

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Do you see other platforms entering this space?

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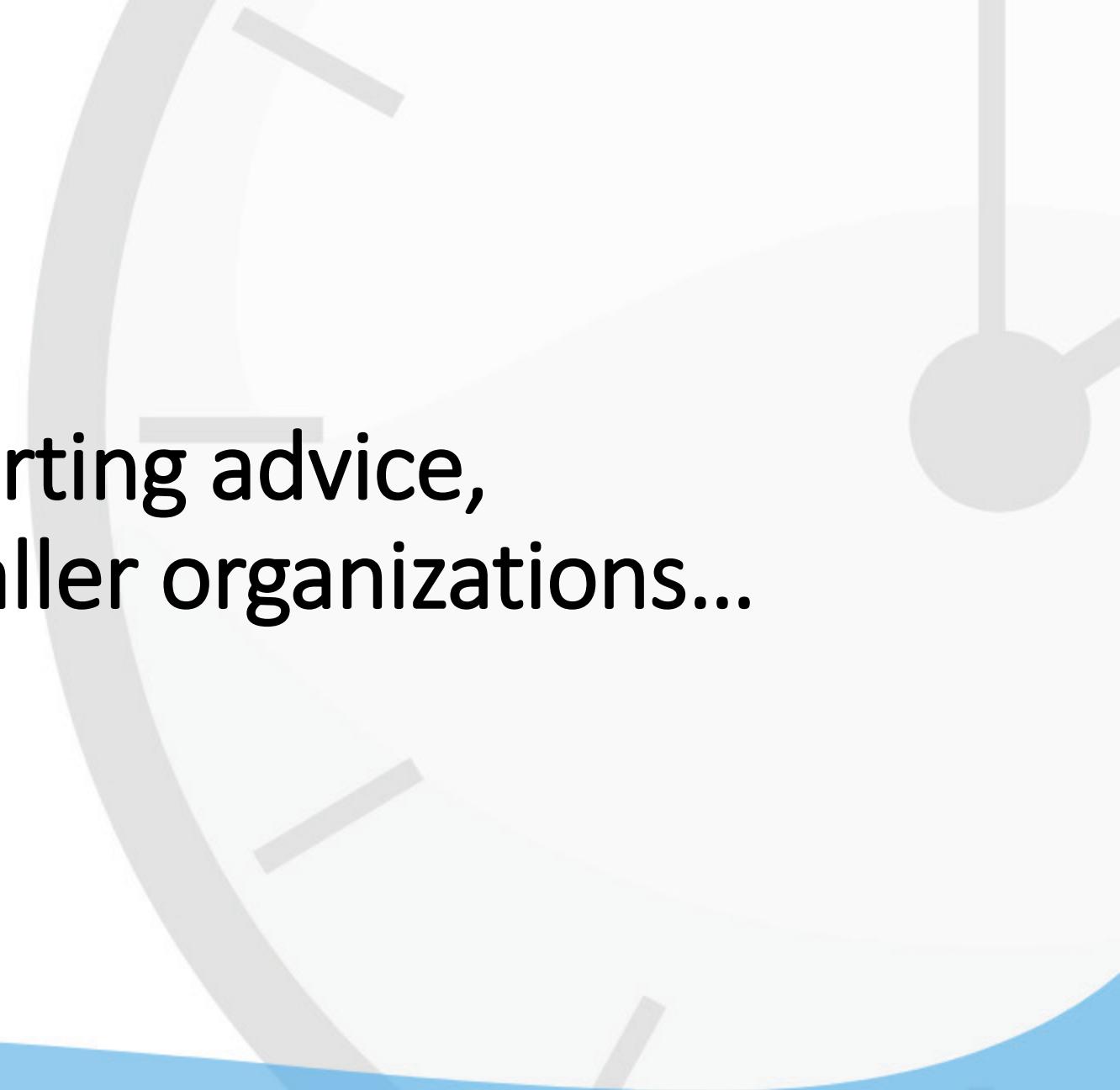
Any last parting advice, especially for smaller organizations...

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Other Questions?

Thank you to our panel of experts!

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THE CIO HOUR™

Delivering technology that **WORKS** for your association.

CONSULTING

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- IT Consulting Services – vCIO Service
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INTEGRATION

MOJO MIDDLEWARE

Mojo Middleware™ - Easily integrate your different association software packages with over 40 available connectors.

SOFTWARE

software Mage

Software Mage™ – Online tools helping you navigate the AMS/CRM selection process, gather requirements, draft your RFP, and evaluate vendor responses.

We are here to help!
Call or email us for a **30 minute free** consulting session

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Final Thoughts

- Join us July 6th for **Hired Guns – Using Fractional C-Suites**

- An archive of this presentation and today's Webinar will be posted on theCIOHour.com in a few days.

- Any suggestions for future programs? Topics you would like to see covered? Please email us: theCIOHour@501works.com

- For CAE credit – you will receive a link via email tomorrow so you can claim your credit and receive your certificate.