

Welcome to the CIO Hour!

September 2023

Beyond the First Look: More Insights into AMS Projects

Today's Panel



OLIVIA WILKINS

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Olivia Wilkins was part of the AMS implementation teams for two associations where she facilitated end user training, delivered business and process analysis, and provided data management. 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 teams. Olivia joined PerByte in February 2022 as the Business Analyst/Project Manager.



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: Beyond the First Look - More Insights into AMS Projects

- 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.



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.

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

In the News...

1. JIMMY BUFFETT (1946-2023)

<https://www.jimmybuffett.com/news/jimmy-buffett-1946-2023>

2. Virgin Galactic is finally sending its first tourists to space

<https://www.nbcnews.com/news/us-news/virgin-galactic-finally-sending-first-tourists-space-rcna99229>

3. California turns to AI to help spot wildfires

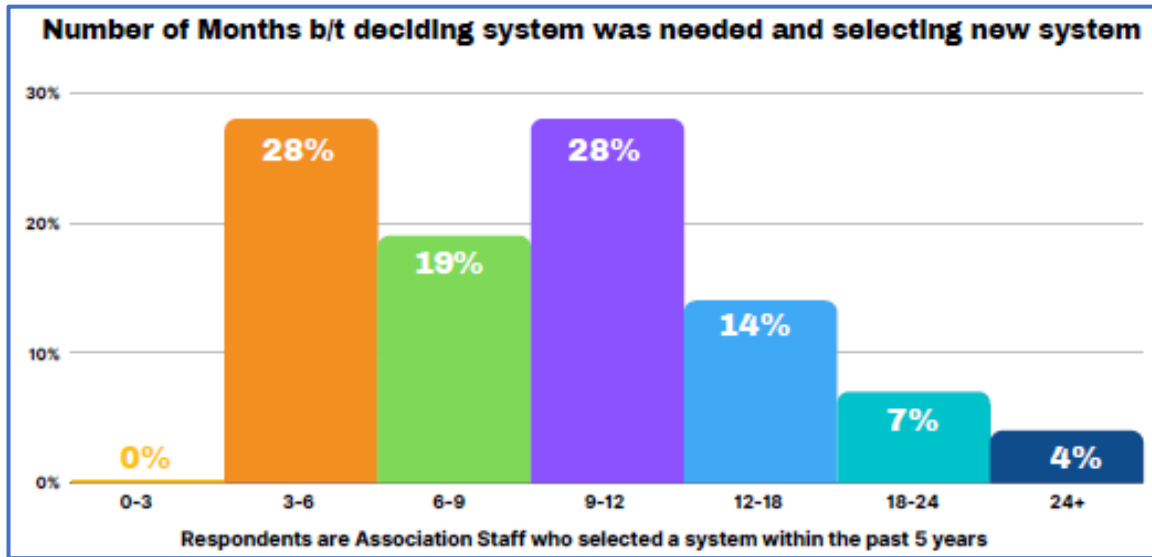
<https://www.reuters.com/world/us/california-turns-ai-help-spot-wildfires-2023-08-11/>

4. Storing unnecessary data could be harming your sustainability goals

<https://www.techradar.com/pro/storing-unnecessary-data-could-be-harming-your-sustainability-goals>

Today's Topic:
Beyond the First Look:
More Insights into AMS Projects

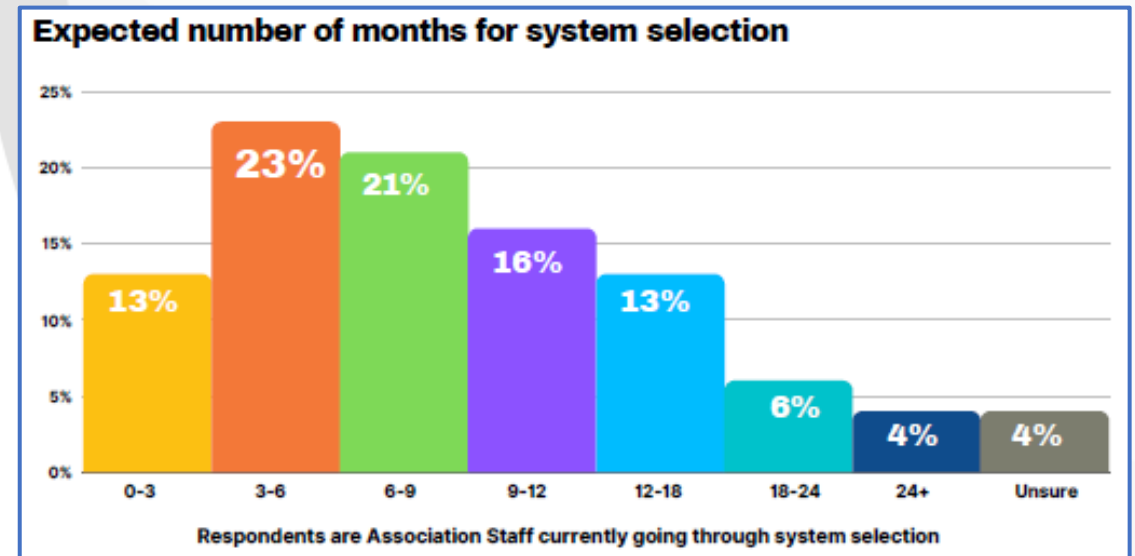
Fast Facts – Expectation versus Reality



Looking at selection:

- No respondents said they were able to do it in 3 months
- 25% took longer than a year

Selection



On to Your Questions...

Survey Overview

- Purpose: what is the AMS/CRM selection process like for clients, vendors, and consultants?
- Launched in October 2021 and closed in December 2021
- 237 respondents across 73 associations, 16 solution providers, and 13 consulting groups
- Five participant groups
 - *Association Staff
 - *Solution Vendors
 - *Association Management Company Representative
 - *Consultants
 - *Other Interested Participants

What do the organization and respondent demographics tell us about the survey results?

- Organization Size – by employee count
 - 0-10
 - 11-50
 - 51+
- Function – Manager/Director
- Department – Membership & CEO/ED/COO
- Role – Project Manager, Executive Sponsor, and “All of the above”

How long were survey respondents on legacy systems before deciding to select a new AMS/CRM?

What types of choices were made that impacted selection decisions?

- Reasons for selecting a new system
- Number of months between system selection and implementation
- Hiring vs Not hiring a Consultant

How did organization size drive the reasons behind seeking out a new AMS/CRM solution?

Does a longer system selection timeline mean shorter or longer implementation timelines?

What do the survey results reveal about the decision to use or not use a Consultant during the system selection process?

How do the challenges of system selection differ based on organization size?

What's Next?

- 2023 AMS/CRM Selection Survey - Coming soon!
 - Will build on the previously collected data
 - Prior survey participants and new participants encouraged to participate
- More to learn
 - Many participants self-identified as interested in sharing more
- More to share
 - Survey insights beyond the First Look report
 - 2023 survey results will be released early 2024

Other Questions?



Thank you to our expert!



Olivia Wilkins

Business Analyst/Project Manager

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

CONSULTING

501 WORKS

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

INTEGRATION



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

SOFTWARE




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 October 5th for **Spooky Cyber Security Challenges**
- 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.

