

Welcome to the CIO Hour!

May 2026

2025 Selection Survey Insights

Today's Panel



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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 in her role at PerByte.



JAMES C. MARQUIS

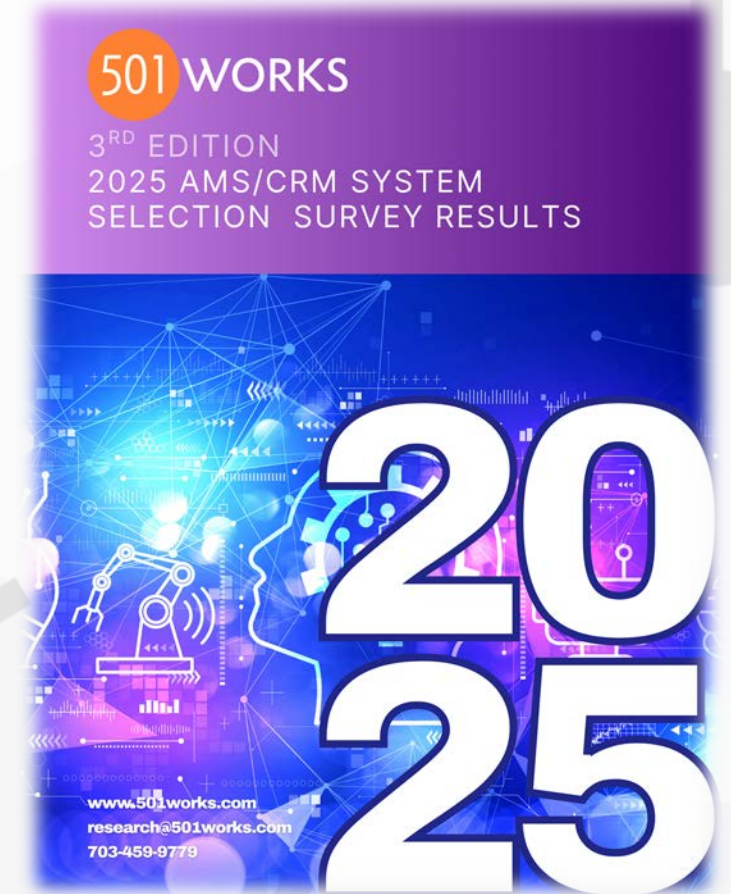
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James C. Marquis is a seasoned senior executive with more than 30 years of experience working in technology with a wide variety of associations and nonprofits. James' work experience includes serving as CIO for a large medical association, CEO of a 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: 2025 Selection Survey Insights

- 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. The uncomfortable truth about AI and the American worker
<https://fortune.com/2026/04/29/why-do-workers-hate-ai-more-productive-training-obsolete/>
2. Why the FCC's router crackdown could leave you stuck with older Wi-Fi
<https://www.pcworld.com/article/3107180/why-the-fccs-router-crackdown-could-leave-you-stuck-with-older-wi-fi.html>
3. The most severe Linux threat to surface in years catches the world flat-footed
<https://arstechnica.com/security/2026/04/as-the-most-severe-linux-threat-in-years-surfaces-the-world-scrambles/>
4. The Nostalgic Software That Made Microsoft Huge Is Now Open Source For Anyone To Use
<https://www.bgr.com/2161424/microsoft-dos-software-source-code-release-nostalgia/>
5. Why 'Good Enough' Customer Experiences Don't Work Anymore
<https://www.inc.com/christophercason/why-good-enough-customer-experiences-dont-work-anymore/91338227>

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Today's Topic: 2025 Selection Survey Insights

What were some of the goals in doing this survey?

The basic research questions we targeted...

- Are the feelings of AMS selection participants positive, negative, or neutral towards the AMS selection process?
- What are the key factors driving the AMS selection participants' feelings towards the AMS selection process?
- How would the creation of a standardized approach to AMS selection benefit AMS selection participants?
- How would the automation/digitization of the AMS selection process benefit AMS selection participants?
- And redoing it in 2023 and 2025 allowed us to confirm data and check for patterns

We wanted diverse responses – and we got them!

- We looked at all sides of the industry:
 - Association Professionals
 - Vendors
 - Consultants
 - AMC Reps

SURVEY PARTICIPANT GROUPS



ASSOCIATION STAFF - 84% OF RESPONDENTS

116 Association employees participated in the survey. 19% of the Association employee participants are in the process of searching for a new system. 60% of Association respondents selected a system within the past 5 years.



VENDOR - 12% OF SURVEY RESPONDENTS

22 Vendor employees representing 14 AMS/CRM solutions



CONSULTANT - 9% OF RESPONDENTS

17 Consultants representing 6 consulting organizations



ASSOCIATION MANAGEMENT COMPANY REPRESENTATIVE - 10% OF RESPONDENTS

18 AMC representatives responded to the survey. 15 were managers of multiple organizations, and 3 manage one organization. Managers of one organization responded to the same survey questions as the Association Staff.



OTHER INTERESTED PARTICIPANTS

6 Survey respondents with experience in the system selection process fell outside of the targeted participant groups but were given the opportunity to share some general information for inclusion in a future survey. This included Association Staff who completed selections more than 5 years ago or who are preparing for system selection in the near future, as well as consulting groups or vendors who provide specific services that may fall outside of system selection and implementation.

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

ASSOCIATION STAFF DEMOGRAPHICS

Fig.1

Organization Type



*"Other" Organization Types included honor societies and service club entities.

Fig.5

Departments

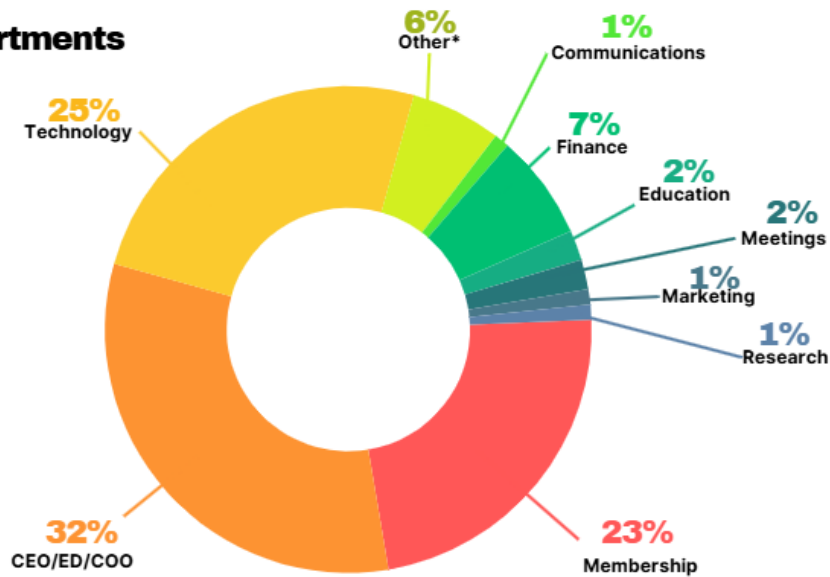
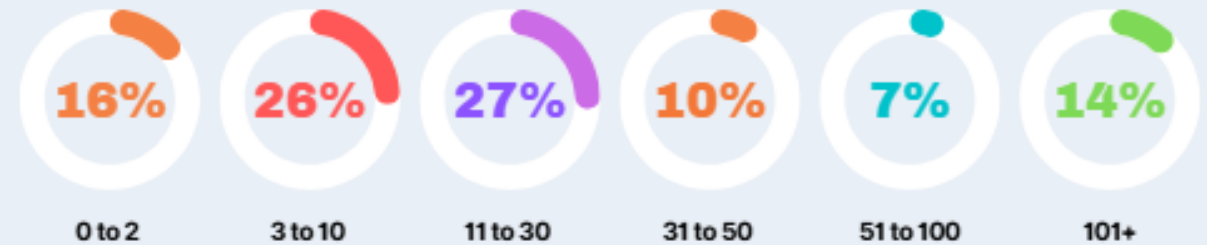


Fig.2

Number of Employees at Association Staff Organizations



Most Association Staff respondents are based at organizations with 3 to 30 staff.

How many folks are volunteering for this kind of project?

There is a big gap between “volunteer” and “voluntold”

 Yes **52%**

 No **10%**

 Yes **33%**


 Unsure **5%**

I was the executive sponsor

How Staff Became Involved in Selection


29%
Volunteered

“Volunteered” refers to participants who sought out inclusion in the system selection process.


71%
Assigned by Management

“Assigned by Management” includes participants who were hired specifically for the system selection process or whose job descriptions included participation in the system selection process.

How frequently do organizations change their AMS?

Longevity varies greatly...

Length of Time on Legacy AMS/CRM



Vendors expend a lot of time and effort seeking new business...

Most put a lot of effort into the selection cycle:



VENDOR INSIGHTS

38% of Vendor respondents receive and respond to between 10 and 20 RFPs per year.



VENDOR INSIGHTS

46% of Vendor respondents say it can take three to four days to respond to a client RFP.



VENDOR INSIGHTS

45% of Vendor respondents provide three demos to potential clients before a selection decision is made, with 36% of respondents providing two demos. 55% said they rarely learn after the targeted demo that the system does not fit the needs of the potential client.

We can do a little better:



VENDOR INSIGHTS

“Requirements are phrased very specifically to make minor corner cases required - very frequently, as later discover, they are ‘nice to have’ or not actual requirements. Nevertheless we must read, and respond to them, and they impact the final proposal, sometimes significantly.”



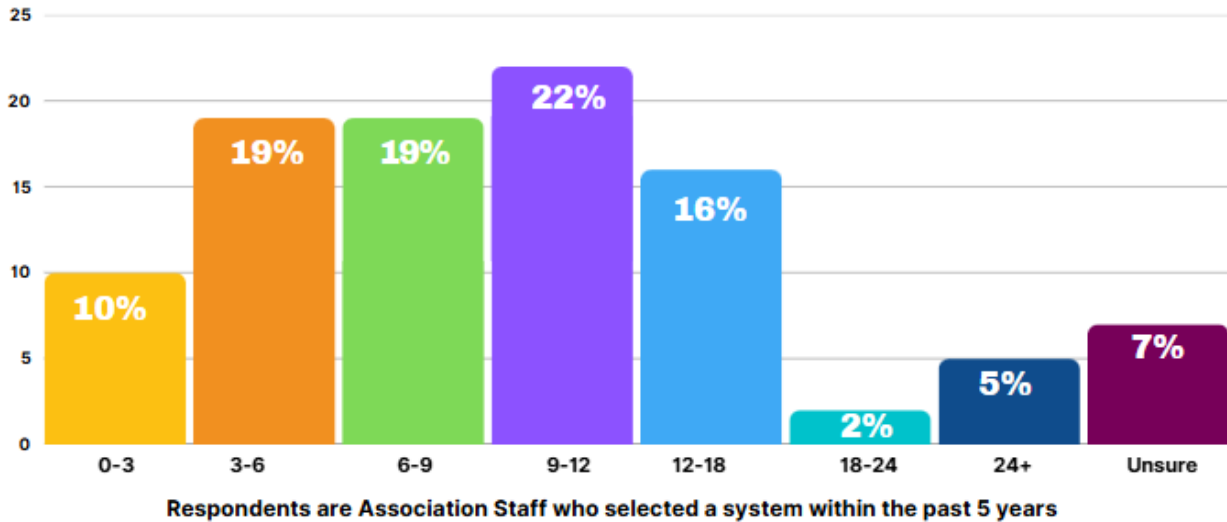
VENDOR INSIGHTS

33% of Vendors said sometimes organizations do not include system/business requirements in the RFP. 33% said system/business requirements are sometimes included that do NOT fit the actual system/business requirements of the organization, followed by 25% who said this frequently occurs.

It looks like we underestimate the time needed for these projects, what did the survey show?

Actual projects take longer than expected

Number of Months b/t deciding system was needed and selecting new system

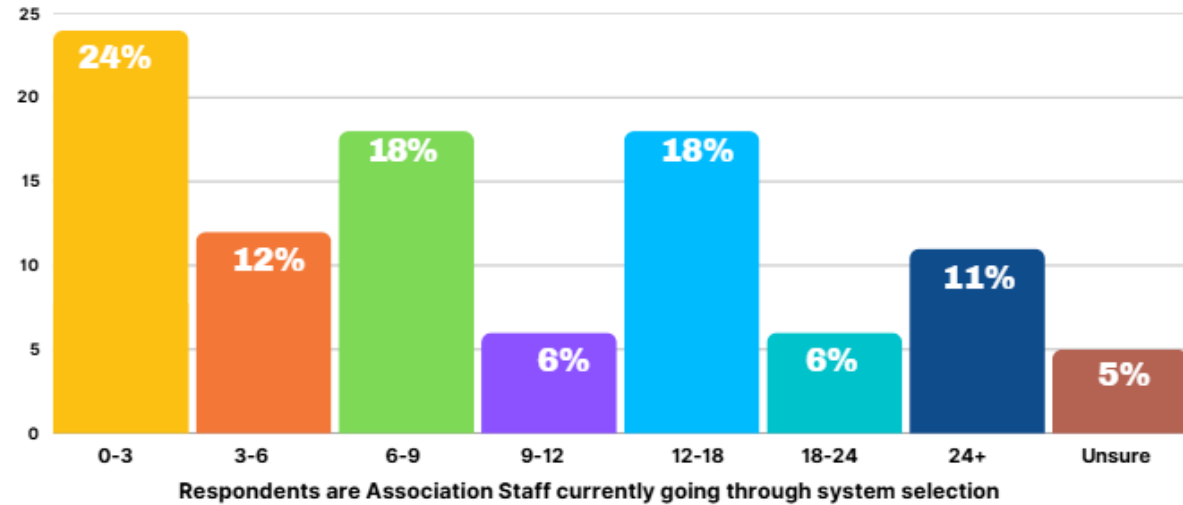


Selection

Looking at selection:

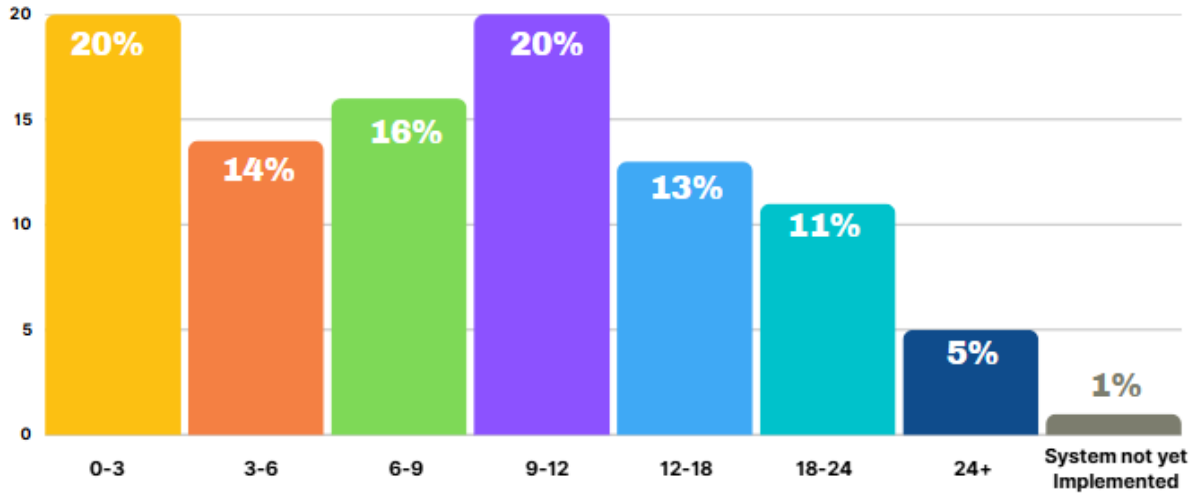
- Some said they were able to do it in 3 months
- 23% took longer than a year

Expected number of months for system selection



Actual projects take longer than expected

Number of Months b/t system selection and system Implementation



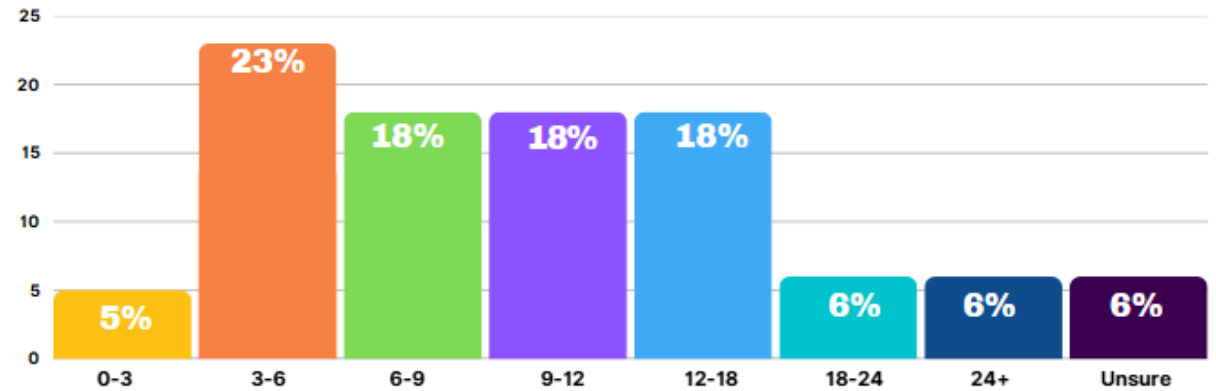
Respondents are Association Staff who selected a system within the past 5 years

Implementation

Looking at implementation:

- 20% of respondents said they were able to do it in 3 months
- 29% took longer than a year

Number of months expected b/t system selection and Implementation



Respondents are Association Staff currently going through system selection

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

Consultant Usage Results

- 41% used/plan to use a consultant for system selection
- 54% did not/will not use a consultant
- 5% unsure



ASSOCIATION STAFF INSIGHTS

Why did your Organization decide not to use a Consultant during the selection process?

"We needed to move at our own pace and had never used a Consultant before so didn't see a need to go that route. I thought about it, but just didn't pursue it. Also didn't have a budget for it."

Some interesting quotes...

What challenges did you face?

I did not understand the amount of time needed by staff to do the conversion and integrations

Each AMS/CRM has its own quirks and difficulties, which is hard to predict and often discovered after decision is made

Buy-in and still holding onto legacy systems

Some things we are finding out is only true if we pay more

Forced short timeline for implementation led to shortcuts and errors; implementation consultant didn't have the bench to effectively support implementation

What challenges did you face?

Vendor's implementation process was poor. Once implementation started many of our requirements were ignored, or the implementation team was unaware of them. Further, because the system runs on a platform...that our staff is unfamiliar with, we experienced difficulties understanding how to use the new system. The vendor's PM refused to consider any training until the end of the implementation process at UAT. This led to incorrect decisions being made during implementation due to lack of system comprehension, and we had to make changes late in the implementation process once we understood how the new system worked. The vendor also left one of the most important parts of the implementation for us to the end, and then discovered that the system didn't meet one of our key requirements, requiring a customization that would not be ready for the scheduled launch date, which could not be moved. (It had already been pushed back once.)

What would you do differently?

Not switch, but lean into the current AMS and provide gobs of training to staff

More due diligence in contacting other associations who use the systems we chose from to ensure the systems met our requirements

I hope to never go through the process again

Some things we are finding out is only true if we pay more

Our consultant insisted that we send our RFP to exactly three AMS candidates. I thought that limitation was weird at the time, and in retrospect, I shouldn't have agreed to that. If I had to do it again, I'd send the RFP to any AMS candidate with a solution that might be a good fit for our organization, perhaps five to eight candidates.

Insights about the RFP process...

RFP distribution is frequently either too wide - the shotgun approach - leading to a bewildering number of options, and it's pure luck as to whether the right one is selected; or it is too narrow, and restricted to vendors that are not a good fit, but who were most persistent with their sales and marketing, had an "in" with the consultant or project lead, or just happened to be in the right place at the right time. This means the project will fail, or deliver a solution that doesn't work for the organization, and in a few years once they have amortized the cost, they start again.

Did anything stand-out to you this time versus the older surveys?

What's Next?

- VenCon – Coming to the DC Area - October 2026
 - Forging greater collaboration between Vendors & Consultants
 - Targeting how we can collectively improve the industry
 - This year's theme – Technical Readiness & Vendor Collaboration
- More Research
 - We need volunteers for conducting a qualitative look at the process
- More to share
 - Survey insights beyond the report
 - Report looking at different size associations

Other Questions?



Thank you to our expert!



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SOFTWARE




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We are here to help!

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Final Thoughts

- Join us June 4th for **AI Versus Jiml – Tools to Aide Your Design**
- 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 certificate. The rules have changed...