Checklist for Ongoing Management of your Association Management Software

While selecting and implementing new association management software (AMS) is a discrete event, the effective use of your database and the ongoing management of your data is a process. In order to get the greatest return on your investment, you have to actively manage your data.

Following is checklist of issues that you should regularly review to ensure you're getting the greatest ROI on your AMS.

- ☐ Do you have all the reports you need? Can staff easily run reports? Are reports clear and effective? Is there confusion about which reports are used for which purpose?
- ☐ Is your system now the "single version of the truth"? That is, have you eliminated all redundant data systems?
- ☐ Has staff fully adopted your system or are there still "shadow systems" in place? If there are shadow systems, what is causing them to be used?
- ☐ How are your receivables? Are you able to easily run a report that shows you receivables by how old they are (e.g., 30-60-90+ days)? Are most of your receivables under 60 days old? If not, why not?
- ☐ How is your documentation of business rules and processes? Can staff easily access the documentation? Does the documentation include screenshots? Is the documentation updated when new processes are added, or when the software is updated? Is the documentation complete enough to use for training of new staff?
- ☐ Are you sure your data is being backed up? Who is responsible for your data backup? Is it being tested to ensure that the backup is actually occurring and that data is actually being backed up?
- ☐ Have you identified the priorities you want to address with your database? Have you addressed them? If you have, what are your new priorities?

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- ☐ Does your opt-out process allow for segmented opt-outs? Can your members and customers opt-out of certain email communications (e.g., product promotions) while continuing to receive other communications (e.g., association news)?

- ☐ Is there a users group for your AMS product? Are you participating in your users group? If there isn't one, why don't you start one?

- ☐ Have you developed data integrity reports (i.e., reports that confirm that your data is being correctly gathered and managed)? What types of data integrity reports to do you need? Do you have reports that ensure key data (e.g., email address, phone number, etc.) are being correctly gathered?

- ☐ Are you making it "easy to buy" from your organization? Can your members and customers manage their own profile via your website? Can they easily purchase or renew membership online or via the phone?

- ☐ Do you have a copy ("test environment") of your database available to staff? Is it up-to-date? Is staff using it for testing, training, and documentation purposes?

- ☐ What functionality do you currently offer online? Membership joins and renewals, meeting registration, product sales? What else still needs to be moved online? What services do *not* need to be moved online (i.e., it doesn't lend itself to self-service)?

- ☐ Do you have a well-established and well documented training plan? Are you testing the results of your training? Have you budgeted for continued training? Do you have a staff person responsible for training (either delivering it or making sure the vendor provides it appropriately)?

- ☐ Have you done a six-month or one-year audit of your system? Do you have audits scheduled for the future?

- ☐ Have you set metrics for measuring progress? Do you have any idea if you've improved since implementing the new system?

- ☐ Have you established a contact management policy? Are you keeping track of key interactions (e.g., emails, phone calls) between your organization and your members and customers? Are you analyzing this information over time to find clues to new products and services?

- ☐ Are you tracking volunteer (i.e., non-transactional) information?

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