



effective database management

The Nine Keys to Long-Term Success with Your Association Management System

Written by Wes Trochlil, President

wes@effectivedatabase.com | www.effectivedatabase.com | 540.338.9404

Table of Contents

Introduction.....	3
Executive Summary.....	3
The Details.....	4
Measures of Success.....	7
Best Practices.....	8
Conclusion.....	9
Acknowledgement of Participants.....	9

Introduction

Ever since the first off-the-shelf association management software programs were introduced more than 20 years, associations have been struggling to find the “magic key” to long-term success with their databases.

This white paper is the synthesis of interviews with eight associations of varying sizes who all have one thing in common: an AMS implementation that they believe has been highly successful for their organization.

Executive Summary

Over the course of these interviews, several key points or themes emerged. Based on these interviews, the following elements were identified as keys to long-term success with your association database. Long-term success is dependent on...

1. **...a successful, long-term relationship with the vendor.** Most of the associations interviewed had relationships with their AMS vendors in excess of eight years.
2. **...a stable staff.** The average tenure for staff working directly with the database was over 7 years. In the association market, especially in the DC area, this is a long time.
3. **...buy-in from senior staff.** Starting with the CEO, long-term success is highly dependent on support from senior staff. If senior staff does not support the database, or worse, actively works against the database, failure is virtually guaranteed.
4. **...a willingness to spend on technology as needed.** While the level of spending for each association varied, without exception, these associations showed a willingness to invest in continuous improvement of the technology.
5. **...pushing self-serve functionality.** Several of the associations noted that providing web-enabled tools to their members and customers (i.e., “self-serve functionality”) has been key to keeping their data up-to-date and providing exceptional customer service.
6. **...standardizing processes and documenting them.** Several associations credited reviewing business processes and documenting them as essential to having a successful database.
7. **...participation from key staff from implementation through to day-to-day use.** Selecting, implementing, and managing a database cannot be an “IT-only” activity. Buy-in and participation from staff is a must.
8. **...communicating with staff and board about the database.** Several of the associations interviewed have regularly-established communication vehicles informing the staff and board of developments with the database and website.
9. **...decentralizing data entry.** Without exception, data entry in these associations was managed by multiple individuals, rather than centralizing the data entry with one individual.

The Details

...a successful, long-term relationship with the vendor. It may be cliché, but it's also true: Buying a new association management system is not the same as buying a new car or a new copier. When you purchase an association management system, you are not only buying the software, you're buying the support from the company that produces the software. And thus, to ensure long-term success of your database, you have to be sure that you have a successful relationship with the vendor itself.

The Society of American Florists have been using the same AMS product for over 11 years. One factor contributing to their success is the relationship they have with their vendor. As Renato Cruz Sogueco puts it, "The vendor-client relationship is the most important element. While we're not their biggest customer, they always make us feel like we're first in line when we contact them with an issue."

Tom Dailly of Emergency Nurses Association put it this way: "The single most important key is realizing you are entering into a partnership, it is not association and vendor, it's a partnership. You have to be working on this together with the vendor. You need to maintain and cultivate that relationship."

Of the eight associations interviewed, all but two have been with the same vendor (though not necessarily the same product) for more than 9 years.

...a stable staff. The average tenure for staff working directly with the database was over 7 years. In the association market, especially in the DC area, this is a long time.

Continuity among the staff who most frequently use the database is absolutely critical for long-term success. Because most associations are too lax in documenting process and policies, this information tends to wind up "in the heads" of the users. A stable staff is able to answer some of the "why do we do it this way?" questions that occur over time. In addition, a stable staff tends to manage data more consistently and is less likely to make extreme changes in data management that may upend years of work.

Amongst the associations I interviewed, one had a staffer who has been with the association over 30 years, another with a staffer that had 44 years. Now *that* is a stable staff!

...buy-in from senior staff. Starting with the CEO, long-term success is highly dependent on support from senior staff. If senior staff does not support the database, or worse, actively works against the database, failure is virtually guaranteed.

Without exception, the associations interviewed for this white paper had complete support from their senior staff, right up to the CEO. While data management may be seen as a "line level" staff activity, the *success* of the database must be discussed and appreciated at the highest levels of the organization. The sheer cost of implementing and managing a database

should be enough to get senior management's attention, but the incredible potential value from managing the database effectively should also be on their radar.

For all groups interviewed, the board of directors was kept apprised of ongoing data management issues, but none of them had direct board involvement.

...a willingness to spend on technology as needed. While the level of spending for each association varied, without exception, these associations showed a willingness to invest in continuous improvement of the technology. In some cases, these associations are spending 4% of their total operating budget on the database and related technologies (including staff costs).

As Ron Moen of the Association Management Center, says, "Spend the money to keep the data clean." AMC often invests in outside resources to help them clean up the data in their database, to ensure its integrity. Data integrity (i.e., data is clean, accurate, up-to-date) is one of the key elements to establishing long-term trust in the database and its data.

In addition, all of the associations interviewed continued to invest in their infrastructure as well as upgrades to their respective data management systems. As Jim Linn of the American Gas Association pointed out, "We don't spend a ton of money every year, but we are sure to budget for major upgrades as they become available."

...pushing self-serve functionality. Several of the associations noted that providing web-enabled tools to their members and customers (i.e., "self-serve functionality") has been key to keeping their data up-to-date and providing exceptional customer service.

"We've really been able to improve efficiencies on data entry via the website," explains Thad Lurie of the American Health Lawyers Association. "Web integration allows us to avoid having to re-key data captured from the website, which lowers the number of errors and increases the speed of changes being made, as they are now instant. This has been a big benefit to our members and our staff."

With some minor exceptions, every association interviewed had pushed the vast majority of their transactional processes online, so that members and customers are able to join and renew, register for meetings, update their account profiles, and otherwise manage their interactions with the association via the association's website.

...standardizing processes and documenting them. Several associations credited reviewing business processes and documenting them as essential to having a successful database.

"We have bindered processes of all daily, weekly and monthly processes and activities. Staff can access this information any time," explained Sogueco.

John Conner of the National Rural Electric Cooperative Association says that documentation

is critical to NRECA's success. "We have formal SOPs [standard operating procedures] and "How To" documents that are all customized, reviewed and updated with each new build or service pack or any change in processing. In fact, we just updated all of our documentation recently."

But others pointed out that, while critical, this is a time-consuming process that can be easily overlooked or ignored. And because processes evolve and change over time, reviewing this documentation regularly is critical to keeping it up-to-date.

...participation from key staff from implementation through to day-to-day use. Selecting, implementing, and managing a database cannot be an "IT-only" activity. Buy-in and participation from staff is a must.

"Outside of IT, our director of Finance is very heavily involved in the day-to-day management of the database," explains Thad Lurie of the American Health Lawyers Association. "It's critical that staff perceive this not as an IT database but as an association database."

Although the primary interviewees for most of the participating associations were from the IT department, all agreed that participation from staff outside the IT department is absolutely critical.

...communicating with staff and board about the database. Several of the associations interviewed have regularly-established communication vehicles informing the staff and board of developments with the database and website.

"As a part of our upgrade process, we have weekly meetings we refer to as 'therapy sessions,' says Moen. "We want our users to be open to doing things differently, and these meetings provide a 'safe' environment for staff to discuss what is working and what is not. The open forum makes these discussions much easier to have and provides an opportunity for staff to speak openly and honestly about what is going on."

Other associations use intranets and periodic newsletters or email announcements to keep users informed. At NRECA, the staff intranet contains tips on using their database. They have the added benefit that all staff have their intranet set as their homepage, so that every day when they open a web browser, they see company announcements first, which may include information about the database.

"At AHLA, the database is discussed at our weekly marketing and VP meetings," explains Lurie. "And we have monthly staff meetings where the database is always on the agenda."

In addition to staff communication, most of the associations interviewed kept their board informed to some degree or another, especially if large expenditures were involved.

...decentralizing data entry. Without exception, data entry in these associations was managed by multiple individuals, rather than centralizing the data entry with one individual.

A key distinction among the associations interviewed was that some had centralized data entry with a particular department of individuals, but others had decentralized beyond a particular department. But in all cases, regardless of association size, more than one individual had data entry responsibility.

Measures of Success

I asked each of the associations how they measure success. How do you know that your database is working effectively for your association? For the majority of respondents, the answer was simple: If users aren't complaining, and they're actually using the system, then you know it is successful.

As Sogueco succinctly put it: "No complaining means it's working."

"One measurement of the success of our system has been how extensively staff is using it," says Tom Dailly of Emergency Nurses Association. "At least half of our staff uses the system, which is much more than we had in our old system. Another measure of success is the amount of new requests we're receiving. When staff is happy with a system, they will ask for more functionality. They are asking for enhancements rather than complaining about things that are not working."

Adds Fulcher: "With our current database, IT no longer has the burden of getting data from the system. Our previous environment required IT involvement to pull data. Now all staff can access data. This is one of our greatest measurements of success."

"One of the ways we know we have a successful implementation and adoption of the database is the number of 'rogue' databases gets reduced," explains Moen. "We know that if our staff is using the centralized database then they will no longer need to create their own Access, Excel or other databases on the network."

Best Practices

And finally, some general thoughts from each of the groups I interviewed. I asked each association executive: “What one piece of advice would you give to other association executives who are seeking to have a long-term successful AMS implementation?” Each respondent provided some very useful tips:

- Explained Thad Lurie of the American Health Lawyers Association: “Standardize, standardize, standardize. Document your processes. Standardize how staff interacts with the database. Make sure you document any customizations. Look at your existing processes and seriously consider changing processes to better fit your software.”
- “Constant training is the key to a happy staff,” explained Renato Sogueco at Society of American Florists. “In the past we had one staff person doing all the complaining and now she is the one doing the training. Once staff was trained, the type of questions changed, from ‘Why can’t the system do this?’ to ‘How does the system do this?’”
- For Ron Moen, director of technology for Association Management Center, the key is clean data. “Spend the money to keep the data clean. Have a staff person whose responsibility it is to watch the data like a hawk. Also focus on process, especially from the customer service perspective.”
- “The time to review your process flows and make changes is while you’re implementing a new AMS,” says Tom Dailly of the Emergency Nurses Association. “Don’t try and do it after you have implemented. It is much more difficult.”
- Jim Linn of the American Gas Association suggests that continual investment is key: “Plan to continue to invest in the system over time; don’t stop maintaining it or short-changing it.”
- As John Conner of the National Rural Electric Cooperative Association puts it, testing and training has really “saved” them. Says John, “Test, test, test and have required mandatory training. Both of these have really saved us from huge problems.”
- “Have others actively involved, including senior management,” explains Carlos Fulcher at the American Society of Plastic Surgeons. “Continuous process improvement requires a large resource commitment, so senior staff has to support it. We’ve committed over 10,000 hours of staff time to implementation. Continuous improvement will be another 3000-4000 hours.”

Conclusion

The road to a successful implementation and long-term management of an association management software system is not simple, and it is not short. But it is navigable with the proper road signs and guidance.

Open communication is clearly a prerequisite. From senior-level buy-in to positive relationships with vendors to periodic meetings with staff, well-managed and proactive communication is a key to success.

Associations who wish to have an AMS implementation that is successful for the long-term will see to it that these very simple, but not easy, suggestions are implemented and managed over time.

Acknowledgement of Participants

I'd like to thank the following individuals for their participation in and contribution to this white paper:

John Conner, Application & Data Advisor, National Rural Electric Cooperative Association
Tom Dailly, Information Technology Officer, Emergency Nurses Association
Carlos Fulcher, Chief Information Officer, American Society of Plastic Surgeons
Jim Linn, Managing Director, Information Technology, American Gas Association
Thad Lurie, Director of Technology, American Health Lawyers Association
Ron Moen, director of technology, Association Management Center
Renato Sogueco, Chief Information Officer, Society of American Florists