

The Ultimate Guide to Association Software

Selecting and Implementing the Right
Tech Stack for Digital Transformation





Introduction

As part of your digital transformation strategy, you may be planning to evaluate new association software in the next 12-18 months. With so many resources available, it can take a lifetime to go through them all to identify what's really important.

For more than 30 years, ASI has been at the forefront of working with associations, unions, charities, and non-profit organizations to become a trusted authority in the association software industry. We have created a comprehensive guide of everything you need to know about association software to help your journey to a new association software be a little less overwhelming.

In our guide, we delve into the basics of the association software market, where to find the best options, what attributes to look for, and how to optimize your tech stack to work the way YOU do.



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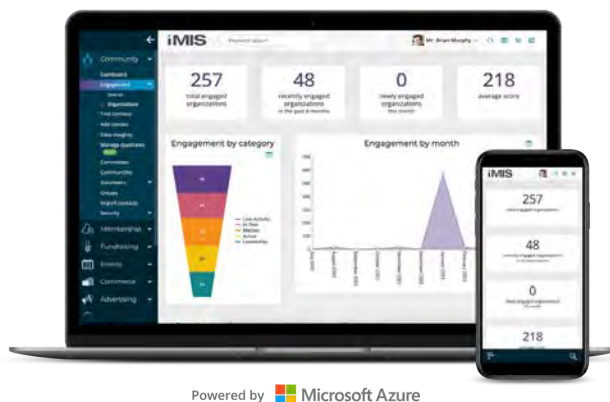
01 What Is Association Software?

There are three primary types of association software:

1

Engagement Management System (EMS)

- Type:** Cloud-based platform, member management system
- What It Does:** AMS, CRM, and CMS in one association software system with member management, member engagement/website and accounting.
- Purpose:** Manages all member data, member engagement and communications, website/portals with CMS and built-in accounting/finance in a single association software platform that supports your digital transformation plans.
- Designed For:** Associations and non-profits.
- Integrations:** Top solutions on the market but most association software functionality is already built in; when specialty applications are required, it offers two-way integration with 150+ Best-of-Breed solutions and 1,000s of business applications with no IT required.



2

CRM-Based Software

- Type:** Cloud-based contact management
- What It Does:** Offers a software platform that integrates with third-party applications
- Purpose:** Manages customer data and relationships
- Designed For:** Commercial sales forces; often relies on third-party apps to provide association functionality
- Integrations:** 1,000s of applications, many of which are not specific to the needs of associations, and often require extensive customization

3

Traditional Association Software

- Type:** Legacy association software systems maintained onsite by the organization or in a data center requiring significant IT involvement.
- What It Does:** Non-cloud-based association software offers member management often with no integration to the website and clunky integrations with other software that creates data silos.
- Purpose:** Manages member data and relationships; this association software must use add-on applications to provide email, event management, website/CMS and other functionality, with no visibility across all member interactions.
- Designed For:** Associations that do not require remote access for staff and have abundant IT resources to manage the association software system
- Integrations:** Typically older, non-cloud-based software requiring extensive customizations that result in a difficult upgrade path for this type of association software.

02 Where to Find Association Software

When you're looking for a new system, there's no shortage of options and advice. But in the end, you need to know how the potential new system will work for your particular association — nothing else matters.

As unique as your association may be, there are likely many other organizations with very similar needs. They've already been down the same road and many are generous enough to share their experiences with association software through independent client review sites.

You can leverage this real-world feedback to help make a better association software decision.

Ask the association software vendors you're considering to provide:

- **References from associations like yours**
- **Independent client review site testimonials**

Look for Un-Biased Review Sites



Capterra

Software Advice

Should You Use a Request for Proposal (RFP)?

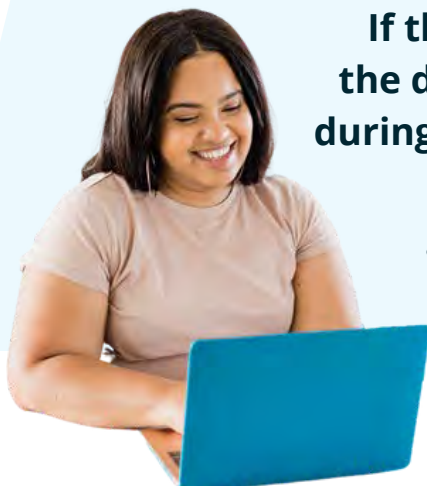
Most associations use an RFP to choose new association software. But you likely used an RFP to find your last system and it has probably let you down, hence you're searching for a new association software. It might be time to try a different approach...

System Previews

A system preview allows you to test the solution provider's offering in a real-world environment using your own information and processes to see how it will work for you before you invest. A system preview can cost less than what you might pay a contractor to develop an RFP for you — and it is a much more accurate way to find the system that's right for you.

The process can vary from vendor to vendor but typically includes:

- Identifying critical needs for recruitment, engagement, retention, and growth
- Building consensus and documenting requirements
- Testing the system with your data and processes



If the system isn't right for you, you can use the detailed requirements document created during the preview process to develop a highly targeted RFP that will save you time and generate a more accurate search result.

03 Attributes to Look For



A Single Source of Truth (SSoT)

A 360° view of every interaction with your members will help you personalize your communications and ensure steady member retention rates. With the right association software — like the iMIS Engagement Management System — you can manage contact data at the individual or organization level and easily keep your data clean with deduping and merge capabilities.

The key is that your entire tech stack needs to be integrated with your core platform so you don't create data silos that can cripple your productivity.



Cloud-Based Association Software Technology

A cloud-based association software system ensures that you and your staff can continue to successfully run your organization and support your members remotely.

Look for association software designed for the unique challenges that membership organizations face every day and add the leading-edge functionality to take your association software to the next level.

With any new association software system, the primary goal is to help your association become a learning organization and achieve continuous performance improvement.



Purpose-Built Association Software Design

An association software that is specifically designed for associations will empower you to:



Access a complete 360° view of your members



Improve the member join and renewal processes



Create member personas to target and personalize communications and offers



Manage complex billing and pricing structures



Seamless Integration with Specialty Apps

Your association software's ability to integrate with the latest solutions on the market will offer:

- A seamless connection between your data and market-leading apps
- Two-way, no-code integration with popular application exchanges to avoid customizations
- Automated workflows with no coding or IT help



Native Accounting & Finance

With built-in accounting functionality, you can manage financial batches, invoices, and adjustments, and offer secure, integrated payment processing when you have the right association software.

04 Six Best Practices for Digital Transformation



Define What Transformation Means to Your Association



Look at Your Organization from Top to Bottom



Focus on Increasing Member Value



Measure Your Association's Progress



Build a Great Team to Lead the Initiative



Never Stop Evolving



Define What Transformation Means to Your Association

Poll your colleagues to determine:

- What's our most pressing issue? Engagement? Retention? New acquisitions?
- Why are some members dropping off? Is it because we're not delivering something they need?
- Are product sales down because our resources aren't digitized?
- Are data silos keeping us from delivering real value to our members?

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Focus on Increasing Member Value

Keep on top of emerging needs:

You can't afford to remain static — listen to what's happening in your industry/community and adapt your resources to best meet your members' changing needs.

Check the Data:

Cloud-based association software — such as an Engagement Management System (EMS) like iMIS — will help you engage your members in every interaction they have with your organization.

Ask Your Members:

Do a quick poll through your year-round mobile app to ask members about your:

- Website: Is the site user-friendly enough?
- Resources: Can they find everything they need from you online?
- Events: Do they want to see more in-person or hybrid events, or do they still feel more comfortable with online events?
- Products: Can they easily get the information they need?

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Build a Great Team to Lead the Initiative

Pull together a group that will drive your efforts. Your innovation team needs to reflect every sector of your association and consist of independent thinkers with differing skill sets, experience levels, ages/backgrounds, and personalities.



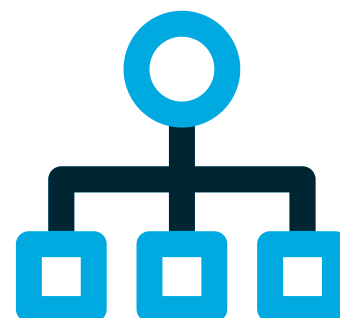
4 Look at Your Organization from Top to Bottom

Look at these key areas to figure out how your association software can aid in carrying out your optimal digital transformation.

Business model:

Reassess exactly how your association operates and consider new ways to meet member needs. Think creatively about:

- Who do you want to serve — has this changed?
- Which services, resources, and experiences can you best deliver?
- Where should you offer these services (online, in-person, hybrid)?
- How and for which issues do you want to advocate?



Technology:

Cloud-based association software is essential for your organization to thrive in the current and future environment. Association software that can support and optimize your digital transformation will make the entire process so much easier and more effective.

Organizational Culture:

It's important to show respect for the history of your association while also embracing new opportunities. If your leadership agreed to explore a digital initiative and select new association software to support the effort, you're halfway there.

Business processes:

Every association can benefit from increased operational efficiency, and this is a great time to reevaluate each of your processes to determine if they can be automated, streamlined, modified, or eliminated.

5 Measure Your Association's Progress

Your digital transformation plan should have stated goals that are meaningful to your organization and can be measured by your association software.



Celebrate the small victories:

Your digital transformation plan doesn't need to be elaborate. Whether it's digitizing your publications, improving the onboarding process, replacing outdated association software, or personalizing your communications — look for the small wins you can feel good about along the way.

Look at qualitative & quantitative results:

While you need quantitative goals that can be easily measured, you should also look for signs of qualitative improvement.

The right association software should help you assess your progress and determine whether members:

- Appreciate what you're doing and leave kudos in your surveys
- Say thanks in your online forum or mainly share complaints
- Refer colleagues for membership
- Regularly attend events



6

Never Stop Evolving

Above all else, remember that your transformation plan is a living, breathing document that should always be top-of-mind for everyone on your team. You'll never be done and if you embrace it, the strategy will become a fun and motivating part of your association's everyday life. And your association software should help you along the way.

Be sure to:

- Share your plan with staff, your Board, and membership — this is the time for transparency.
- Ask for regular feedback from members, staff, volunteers, committee chairpersons, etc., etc. using polls and surveys.
- Check to see how your association software can be used in new ways to help meet your goals.
- Reevaluate your plan every 6 months to ensure you're ready for the next challenge that might come your way.



Your tech stack is likely unique to your association and there's no one "right" configuration.

05 Building a Tech Stack That Works for Your Organization

Your tech stack is likely unique to your association and there's no one "right" configuration.

If you're building out a digital transformation strategy, below are the general areas you want to look at to ensure you've got an comprehensive association software system.



Core Association Software Platform

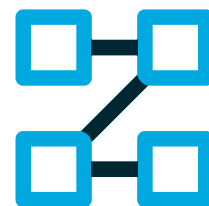
You'll want a cloud-based association software system designed for membership organizations that can deliver maximum reliability, flexibility, scalability, and includes:

- Member Management — CRM & Data Management
- Website Management
- Built-in Accounting/Finance

Analytics and Automation

Association software that offers powerful automation, as well as robust queries, reporting, and dashboards, is critical. You'll need association software that features:

- Member engagement scoring
- Flexible reporting and dynamic dashboards
- Advanced workflow automation



Events and Learning

Events and continuing professional education are important member benefits you can provide that encourage engagement and help galvanize retention rates. Your association software tech stack might include:



Learning Management System (LMS)



Job Boards/Career Center Technology



Event Management (online and in-person)



Application & Review Management

Advertising and eCommerce

It's essential that you continue to build your association's brand and your association software should help facilitate this.

Advertising can be a great way to diversify revenue streams to ensure you can support:

- Advertising and Sponsorships
- Product and Resource Sales
- Online Store and Merchandising



Communications & Engagement

Strategically engaging with your members in new ways — based on member personas and other association software system data — can help ensure member retention. Your association software should support:

- Highly targeted email marketing
- Online communities that promote professional networking
- A year-round mobile app to help you stay in close touch

06 Final Takeaways

Finding the right association software can be an exhilarating process that will ensure your association is ready for the challenges ahead.

As you go about your selection process, keep these best practices in mind:

- Understand the pros and cons of the different types of association software
- Choose an Engagement Management System — like iMIS— that's purpose-built for your association
- Ensure your association software supports your digital transformation goals
- Build a tailored tech stack that works for your association
- Try a system preview before deciding on your association software
- Read what your peers report on independent client review sites about the association software you're evaluating
- Never stop evolving — remain nimble and open to new ideas/methods

Take our short 7-question quick assessment to find out how agile and predictive your organization is and uncover what might be holding you back from achieving continuous performance improvement.



Take the 7-Question Quick Assessment

www.imis.com/quickassessment

Discover your organization's digital maturity instantly.

07 Next Steps & Additional Resources

If you're considering new membership management software as part of your organization's digital transformation strategy in the next 1-2 years, we've put together several resources that can help you now.



eBook

Get insights on how to improve your performance by becoming a learning organization to achieve continuous performance improvement.

imis.com/assocbook



Whitepaper

Establishing a Single Source of Truth (SSoT) is critical for creating highly personalized, engaging member experiences.

imis.com/datasilos



Whitepaper

A guide for member-centric organizations to identify and combat toxic tech cultures for transformative growth.

imis.com/toxictech



Online Resources

Access a variety of resources to help you navigate your digital transformation journey from inception to evolution.

imis.com/digitaltransformation

About ASI, the Developers of iMIS

Advanced Solutions International (ASI) is a leading global provider of cloud software and services for associations

and non-profits. We help clients digitally transform, streamline operations, and grow revenue through industry expertise, best-practice advice, and high-quality solutions. Our portfolio of solutions includes iMIS for association and non-profit management, TopClass LMS for learning management, and OpenWater for application and review management.



Need help creating a Continuous Performance Improvement culture?

iMIS, the world's only Engagement Management System (EMS), is purpose-built for the way associations, unions, and non-profits work and designed at its core to eliminate data silos and uproot toxic tech.

Schedule a demo with the iMIS team today to see how iMIS provides a single data source so you can learn from every member interaction and engagement — putting you on a clear path to continuous performance improvement.



