



The Buyer's Guide

to Association Management Software



So you've decided that your professional or trade association needs new association management software.

Maybe your association has grown over the past few years and you need a tool with more functionality. Or maybe the solution you're using now has the features you need, but service and reliability are an issue.

Whatever the case may be, you know it's time to embark on the membership software shopping process. But where do you even begin? What staff members should be involved? What features should you be looking for? What *really* separates software providers?

In this Buyer's Guide, we'll cover it all, helping you land on the perfect association management system for *your* professional or trade association.



Who to involve

When it comes to selecting new technology, there are often a lot of people involved, each with their own opinion about what's most important — features, price, implementation timeline, etc. But too many cooks in the kitchen can *really* slow this process down.

To save yourself some back and forth (not to mention, headaches), start by identifying key stakeholders up front. Who on your staff will be using the software the most? Whose opinions carry the most weight? Gather that group together and form a small task force.

From there, begin making a list of all the key requirements you're looking for in an association management system. You'll want to break that list down into "must-haves" and "would-like-to-haves." What is your team willing to compromise on and what is non-negotiable? Knowing this from the get-go will help you narrow the vendor field.

What features to look for

Once you have the right people involved, it's time to start researching association management software solutions. You'll want to evaluate a few key features, in particular:

► **Special note for trade associations:**

*If you work for a trade association, you'll want to look for a special type of functionality here: **parent and child account management**. To manage your membership better, you'll want to seek an association management system that will allow you to elect who the parent account is (the company member) and who the child accounts are (the employees of that company who are members). That feature, combined with the member attributes feature we just mentioned, will allow you to manage permissions — billing permissions, in particular — accordingly.*

1 Database

Your association's database is at the heart of everything you do. All the features we'll talk about after this really only work if your database is in good shape.

When evaluating the database portion of an association management system, you'll want to look for certain functionalities, specifically the ability to grant certain permissions based on certain member attributes. Many association management systems come with built-in member attributes (name, email, phone number, etc.), but some will allow you to configure custom attributes (member type, location, special interests, etc.). Look for a system that will give you *that* type of flexibility.

This will allow you to manage permissions better, and not only that, but engage with your members in more meaningful ways (for example, through more targeted emails, which we'll talk about later).

You'll also want to look for a user-friendly database — one that will allow your staff to easily make changes on the back end and one that will reflect any activity your members conduct on the front end (for example, profile updates and password resets).



2 Website & CMS

Your website is your association’s biggest marketing tool. It’s how you attract prospects, engage members, extend benefits, collect payments...the list goes on and on. So when researching association management software solutions, it’s crucial that website features and functionality — on the front end and back end — are at the top of your list.

Beyond that, you’ll want to look for an association management system that includes a content management system (CMS). This will allow you to make real-time edits to your member website, keeping your content fresh and up to date. This is an especially great feature if you’ve had to rely on an IT person or webmaster in the past to make edits to your member website. With a CMS, you can easily make those edits on your own, saving you time and, potentially, money.

As you’re evaluating the website and CMS portion of an association management system, be on the lookout for the following features and functionality:

- Mobile-friendly design
- Members-only portal
- Online membership directory
- Online event registration
- Social media integration
- Association job board
- Online payment processing
- Blog
- Advertising opportunities



3 Tiered dues management

If your association has a tiered dues structure, or in other words, varying membership levels, then it's important to look for an association management system that's flexible and configurable.

You'll want to look for a system that will allow you to...

- Assign certain benefits (and permissions, in particular) to certain membership levels
- Assign each member to a membership level
- Track each member's benefit usage

Even if you don't have a tiered dues structure now, if that's something you'd like to try in the near future to give business leaders more options, that's something worth factoring in as you evaluate software options.

4 Email marketing

After your website, email is probably your association's second biggest marketing tool, so it should also be high on your list of features to scope out.

You'll want to look for an association management system that will allow you to...

- Send personalized emails (Insert names, member types, etc.)
- Send targeted emails (Target new members, special interest groups, etc.)
- Send automated emails (Automate dues renewal reminder emails, event confirmation emails, etc.)

Additionally, you'll want a solution that will allow you to easily view email performance — open rates, click-through rates, etc. If you can see what's resonating with your audience and what's not, you can make adjustments to improve your association's communications.

5 Event management

Next up: events. Your association likely hosts a number of events throughout the year, whether in-person, virtual, or hybrid. These may include luncheons, workshops, silent auctions, conferences and trade shows — and everything in between! Whatever your event calendar may look like, you need a membership management system that can support it...*literally*.

You'll want to look for association management software that will allow for...

- Online event registrations
- Online payment processing
- Flexible form building
- Automated confirmation emails
- Promo and discount codes
- Real-time communication
- Sponsor visibility

If your association hosts any particularly large events, you may need more robust event management software. In that case, you'll want to look for an association management system that integrates with an event management platform. Some companies, such as [MemberClicks](#), offer both, meaning you can rely on the same provider for all your association management needs.

6 Financial management

Financial management is a critical part of managing your association, so it's important to find an association management system that will allow you to configure, automate, and track important financials. Specifically, you'll want to look for membership management software that is PCI-compliant and integrates with your existing accounting software. (As you're demoing solutions, this may be an area where you'd like to loop in someone who handles your organization's finances directly, if they're not involved already. We all know finance is a world of its own!)

7 Reporting

We mentioned reporting in a couple sections already, which just goes to show the importance of this feature. If you can pull and analyze reports, you can make data-driven decisions to better serve your members and aid in organizational growth.

When evaluating the reporting functionality in a membership management system, you'll want to look for configurability. What trends are you seeking to identify? What data is important to your board of directors? How can data from your chamber management solution be used to support membership growth and retention, as well as non-dues revenue generation? What do you currently report on and what would you like to be able to report on? Discuss that with potential software vendors to make sure those are reports you can pull with ease.



BONUS TIPS

TIP #1

Look for a software provider that's constantly releasing product updates based on client feedback. When evaluating software solutions, you, of course, want to focus on the features that are readily available, but be sure to ask about future updates and enhancements as well. You want a software solution that's constantly improving.

TIP #2

Look for association management software that integrates well with other software solutions, whether those are solutions you're using now or plan to use in the future. (For example, event management software, learning management software, job board software, etc.) Bonus if you can find a membership management software provider with a platform of integrated solutions, so you're not having to deal with multiple vendors, support teams, billing departments, etc.

What to seek in a software provider:

Nailing down the right member software for your chamber is one thing, but nailing down the right member software *provider* is another.

See what others have to say!

In addition to what each provider says, see what other current and former users have to say. Check out review sites, such as [Capterra](#), [G2](#), and Google Reviews.

When evaluating association management software, don't forget to evaluate the software provider too. Ideally, you don't just want a provider...you want a partner in association management. Look for a technology partner that will...

- Pair you with a dedicated staff member to get you up and running successfully
- Give you access to an online Help Center with training articles and videos (Accessible 24/7/365)
- Support you with a highly-rated Help Team
- Offer ongoing training opportunities, both online and in person
- Provide you with free best practices and industry resources
- Assist you with add-on features and integrated solutions to make your association management software even more powerful

◀ *For Google Reviews, just search each provider and you'll see the reviews pop up either at the top of the page or on the right, depending on whether you're using a mobile device or a desktop/laptop computer.*



We know embarking on the association management software shopping process can seem daunting, but as long as you involve the right people, do your research, and ask the right questions, you'll be on the right path to pinpointing the best membership management system for *your* association.

If you're interested in learning more about association management software and other tools from MemberClicks, give us a call at **800-914-2441 or visit us at memberclicks.com.**

More about MemberClicks

MemberClicks offers all the tools that membership organizations need to make the most of the web. From online databases and event registrations to custom-designed websites and member communities, our products are tailor-made for professional associations, trade associations, and chambers of all sizes.

For more information:

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