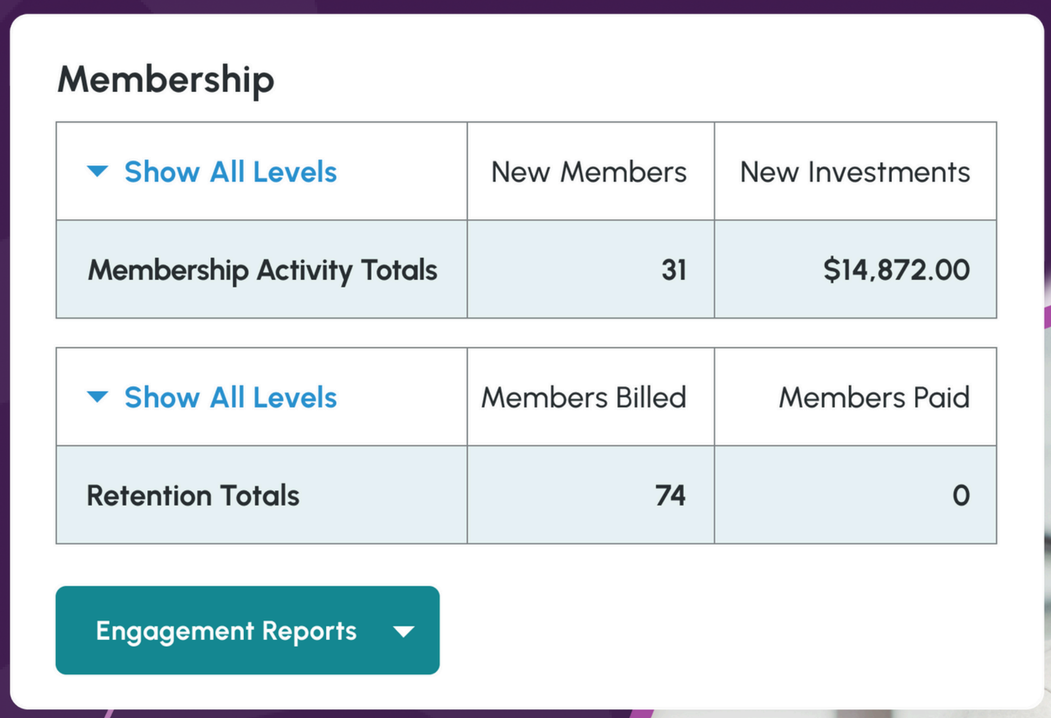
Personify® MemberClicks

Selecting an Association Management Software (AMS)

Discover the value of an AMS and deliver more value to your members with the right software for your organization



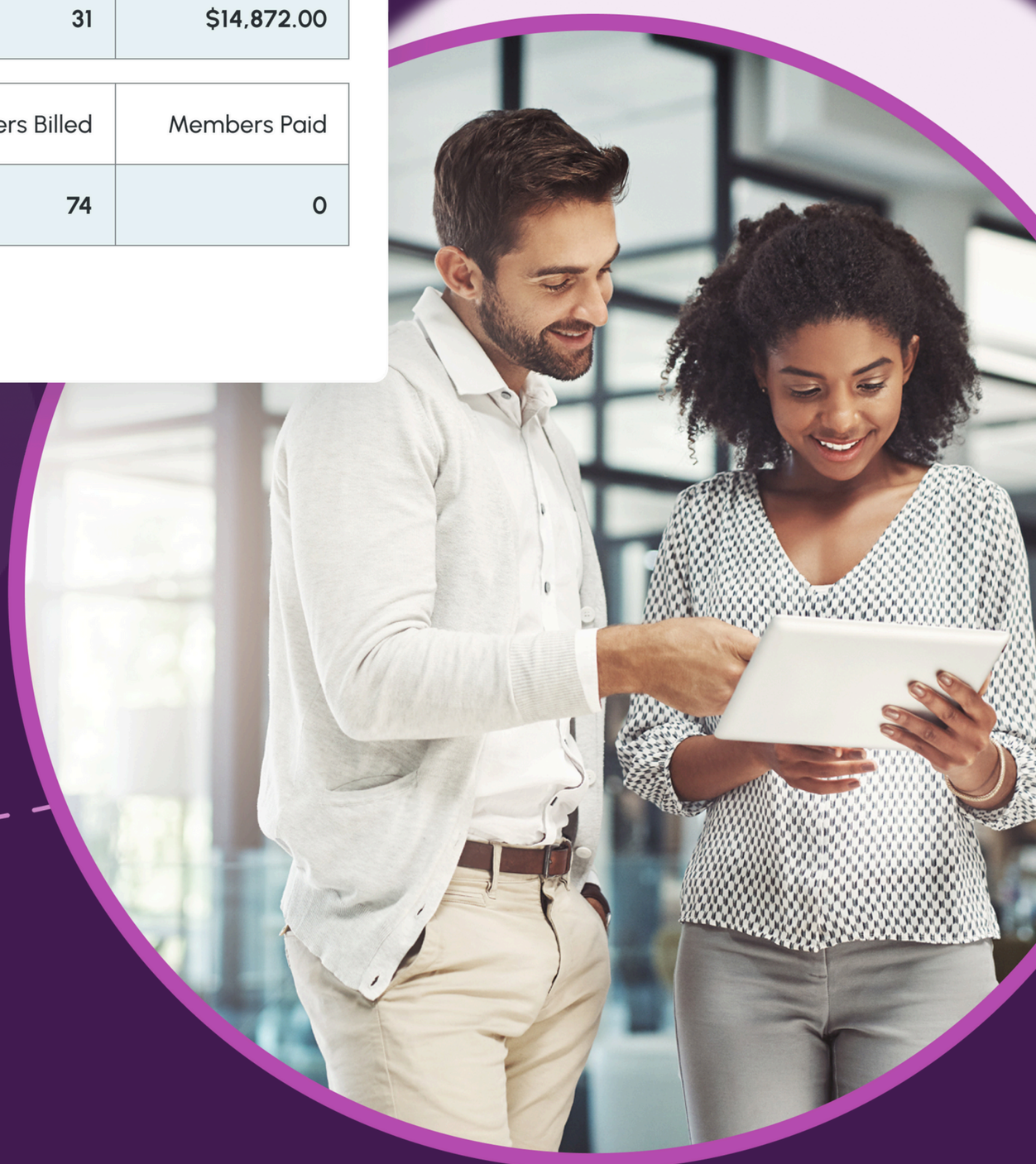


Table of Contents

1 Introduction

2 Section 1: What is an AMS

3 Section 2: Association Management Software vs. Membership Management Software

4 Section 3: The Benefits of Using Association Management Software

6 Section 4: How does an AMS benefit your members?

7 Section 5: Features to look for in an AMS

11 Section 6: How to Choose the Right AMS

13 Section 7: Moving Forward With Association Management Software Selection

15 AMS Selection Checklist

Introduction

Association professionals have a lot on their plates—from growing membership to driving non-dues revenue, planning events and connecting with their members.

An association management software (AMS) can help streamline your day by providing an all-in-one solution to send emails, run membership reports, track your organization's revenue, and much more.

If association management software is new to you, you're in the right place. In this guide, we're covering:



- What is an AMS?
- Association Management Software vs. Membership Management Software
- Key AMS Features
- Benefits of Using Association Management Software
- How to Choose the Right AMS
- Our Top Association Management Software Recommendation

Our goal is to empower you to know the key features and benefits of an AMS that are right for your organization's needs.

Section 1: What is an AMS?

AMS stands for association management software, also often referred to as an association management system. Whatever you call it, it's a type of technology - often cloud-based - that is used by associations and other membership organizations.

An AMS is an all-in-one platform that helps staff manage the entire member journey — from recruitment to retention to referrals and beyond, all in one system.



And yes, we mean everything. That means:

- Maintaining an up-to-date member database
- Emailing and communicating with members
- Automating tasks like member renewal reminders
- Enabling members to securely pay dues online
- Creating and managing an online community for members to network with one another
- Hosting a learning management system for education and certifications
- Planning events
- So much more

Section 2: Association Management Software vs. Membership Management Software

The terms “association management software” and “member management software” are sometimes used interchangeably. While the two concepts are practically the same, they aren’t technically interchangeable.

Membership management software
is a broad, umbrella term. This category of software caters to a wide range of organization types that have members, including chambers of commerce, non-profits, clubs and associations.

On the other hand
association management software
is a narrower concept that falls under the umbrella of membership management software. An AMS is specifically tailored for the needs of associations and lets associations automate dues renewals, accept payments online, build membership tiers and more. In some cases, the software is designed for specific use cases like ‘better for trade associations’ that have primarily business memberships.



How does an AMS system differ from AMS software?

An AMS system is an all-in-one technology package that combines multiple Association Management Software tools into one comprehensive system. This means your membership platform combined with your:

- Integrated website
- Content management system (CMS)
- Online member engagement community
- Online transaction management
- Any other necessary platforms for an integrated system.

Combined solutions allow organizations to trade in their series of disconnected systems for one connected solution.

Think of your AMS system as the pie shell and all your AMS software and other membership tools as the ingredients.

The system is great for associations because it means that all your tools speak to each other and work seamlessly together. It eliminates the need for your team to use multiple logins while juggling multiple platforms. Finally, instead of budgeting for multiple systems, you can simplify your outgoing payments into just one bill.

The Value of an AMS

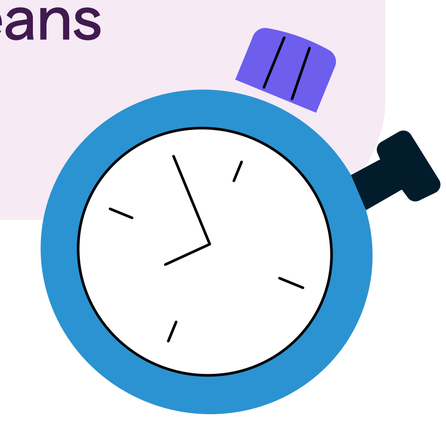
Using an AMS has many advantages that will save your organization time and money. Some you may not have even considered yet!

Section 3: The Benefits of Using Association Management Software

Association management software was built to streamline daily tasks for associations and to improve efficiency for association members and staff. While association management software provides organizations with a variety of benefits, the most common include:

Free up your staff's time

According to a WildApricot report, 43% of organizations had trouble with growth because they simply don't have enough time. And that's where an AMS can help. Toggling back and forth between different tools for member database, email marketing, and event registration costs your staff valuable time (especially with all that context switching). But an all-in-one AMS platform (or one with an array of integrations) centralizes all these functions in one place—so no switching back and forth. That means your staff can focus on serving your members.



Boost data security

Because management software is created specifically for associations, you can trust that an AMS will keep your organization and member information safe. Comprehensive AMS systems include payment card industry (PCI) compliance, firewall protection, data encryption, password protection, and data privacy features.



Create a seamless member experience

While an AMS can make things easier for your staff, it can also help you deliver a more cohesive experience for your members. For example: A member gets an email prompting them to renew their membership. Rather than having to wait for regular business hours to call your office and pay for dues over the phone, they can click a prompt in the email, and go right to a secure payment processor via your AMS. From there, they can pay their dues easily online.

Get a 10,000-foot view of your membership

A solid AMS system will provide you with reporting and analytics features that allow you to see how your membership base is growing, what growth tactics are working, and compare data month-over-month and year-over-year. With this kind of crucial information easily available, you can make more data-driven decisions.

Training and other resources

Your tech provider can offer ongoing support and training on industry best practices to help your team make the most of your software solution. This is especially helpful for small-staff organizations with limited resources. Once staff members are completely familiar with the software system, they can be more effective and efficient in their daily work.

System integration cost savings

Many associationswork with a series of spreadsheets, ‘affordable’ email solutions and other disconnected systems. This can be a part of growing or a misconception that you’re saving money. What often happens is staff find a tipping point where the needs of the organization make working with many different tools time-consuming, costly and possibly sloppy.

If you’re considering setting up your own integrations between systems, be sure to consider the investment of a developer to build those AND the ongoing costs of managing integrations each time there’s an upgrade in X or Y or Z system. A simple upgrade in one tool could break your integration.

One natively integrated AMS with all the tools your staff needs in one place means they only need to learn one tool, log in in one place and manage members seamlessly in one location. And the AMS provider maintains the upgrades and integrations.

Scalability and growth

You want to grow your organization, right? An AMS is designed to help you do just that. With everything in one place, you can focus on providing member value, hosting events and generating non-dues revenue. You can also look to add member benefits like courses and certifications, or launch an online community where members can discuss relevant topics and engage with one another.

A scalable AMS, like MemberClicks, will also have a set of tools for things like learning management and an online community integrated with the AMS so that you can track participation and certifications.

Section 4: How does an AMS benefit your members?

Your members are the heart and soul of your organization, so it's important to offer them valuable experiences that help develop their careers and encourage them to maintain their membership. An AMS can bring all member engagement efforts under one umbrella to give members exactly what they need to thrive. A comprehensive solution offers these member benefits:

Provides members personalized experience

Since an AMS offers features and capabilities, you can offer your members a more personalized experience that wouldn't be possible with a manual system. For example, you can pull specific data from your AMS such as their preferred name or membership type and deliver tailored messaging in your email communication. Plus, your AMS can pre-populate form fields with members' information, simplifying the process and making it more likely that they'll complete the form.



Gives members a place to connect

Social communication features like messaging capabilities, online forums, and a member directory allow members to interact and network to develop personal and professional relationships. This allows members to get more from their membership and may even lead to new career opportunities for them.

Adds convenience to membership

Members receive all the information and materials provided by your organization in just one online location rather than having to log into multiple systems. Plus, with features like automated dues renewal reminder emails, member profiles, and pre-populated form fields, members can update their membership status and profile information much more easily.

Section 5: Features to look for in association management software

Association management software was built to streamline daily tasks for associations and to improve efficiency for association members and staff. While association management software provides organizations with a variety of benefits, the most common include:



While each AMS system will look different, you should ensure the solution you choose contains these necessary elements:

- Membership database
- Website builder
- Dues payment and application collection
- Membership directories
- Email marketing
- Event support
- Online community
- Reporting

Read on to explore these in detail.

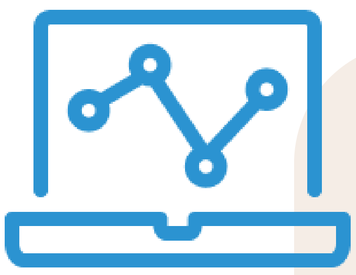
Membership database



Your membership database allows you to store and track all member and prospect information. This feature lets you get to know your members more while also:

- Streamlining administrative processes
- Tracking member engagement to help you make data-driven decisions
- Empowering your team to recognize member patterns and build processes

Website builder



Some AMS systems, like MemberClicks, offer website tools that allow you to build, host, manage and integrate your website within your AMS. This means that all your data collection, updating pages, posting blogs etc. can all be done in the same tool. It's a BIG-time saver for associations. Building your website in-house:

- Gives you more power over your brand than relying on a third-party
- Save time when updating pages or adding info to your website
- Let's you give members exactly what you want by building something specifically for them

Dues payment and application collection



A great AMS will streamline the entire dues-renewal process with automation tools and online payment features. Dues collection and renewals can take a lot of your staffs' time. This feature is a big time-saver. If you want more info on this, check our blog: Why You Need Association Management Software to Collect Member Dues

Membership directories

Directories are a great networking tool, and networking is often a BIG member benefit for associations and chambers. A great AMS will help you build directories for your members and set them to be private for members-only or public for everyone to search. You can learn more about directories here.



Email marketing

Marketing is a critical part of growing and retaining your membership base. Emails include dues reminders, renewals, newsletters, event announcements and more.

Many AMS systems come with a powerful marketing tool to help you do this — an email marketing platform. When comparing these features in AMS' look for:

- Personalized and automated emails:
  - Personalized emails help you engage and retain members.
  - Automated email processes let you schedule emails and organize triggered renewal reminders .
- List segmentation: Being able to segment members based on shared characteristics lets you target specific groups for specific messaging. It's a BIG bonus to make sure you're including the best people with info that is relevant to them.

Event registration

Events are a major driver of non-dues revenue. They provide valuable educational and networking experiences for your members, too. A comprehensive AMS that includes conference and event management software makes this process simple. With this tool, you should be able to:

- Use your membership database to create pre-populated form fields for those who've historically interacted with your organization (making registration easy for your engaged members!)
- Use secure payment processing
- Send email reminders to event registrants to help generate excitement
- Track attendance to measure the success of your event

In addition to MemberClicks' built-in registration tools, we offer integration with advanced event registration that includes automated badge printing and lead retrieval.

Click here to learn more about our registration technology

Online community

Another element of fostering community among your members is providing opportunities for them to regularly connect and chat with one another. Providing a more relaxed forum for networking drives member loyalty and creates valuable members-only experiences.

Therefore, you'll want to find an AMS system that offers an online community feature. Your member community should include the following features:

- Discussion boards to share ideas and spark learning opportunities.
- Multimedia support for members to share images, videos and more
- Special interest group so members can talk about specific topics
- Search function for members to explore your directories and network
- Member-to-member messaging to foster more networking opportunities.
- Gamification elements, including online badges, points-tracking, surveys,
- and leaderboards, to increase participation and reward engagement.

#DYK MemberClicks integrates directly with our community platform, aptly named CommUnity! Check out this case study for more information.

Learn more about CommUnity

Section 6: How to Choose the Right AMS

Every AMS has different offerings when it comes to functionality and pricing options. Some software is priced lower to be budget-friendly for startups and small associations. These options may lack some features as a tradeoff for the lower cost. Other feature-rich software may have a higher price tag, but are often built with all the features you'd love to have.

That's why it's crucial to understand your organization's unique needs when it comes to an AMS and to really think about the functionality that is most important to your team.



To assess what AMS would work best for your organization, follow a few steps:

1. Think about and write down your goals and needs.

Before starting your search, sit down with your team to define your goals. What do you need an AMS for most—are there any gaps that an AMS could help fill? How can an AMS best serve your organization and your members? For example: If you need help connecting your members to one another, finding software that helps you set up an online member community for networking might be a good fit.

2. Research and book demos

Now it's time to shop around to see what's out there. While a quick Google search will unearth a few AMS options, don't forget to also read reviews and ask other organizations about their experiences.

You can also book demos of ones that seem like good fits to really understand how they function and can work with your association.

3. Ask software providers tough questions.

While many management software creators have websites with robust FAQ sections and details on functionality, don't be shy about reaching out to providers directly. Ask for a demo—is the software user-friendly enough for you and your staff to use daily? Does the software centralize features in one platform (i.e., a member database and marketing functions)? Do they have customer testimonials you can review to help with your decision?

4. Select your top picks.

Based on your research, it's time to make your shortlist. Try to narrow it down to your top two or three options based on the goals you have outlined and the functionality you need to make the investment worth it. Do a side-by-side comparison. Which option includes most (or all) of the features you want, is easy to navigate, and is within your organization's budget?

Section 7: Moving Forward With Association Management Software Selection

While MemberClicks is a top-notch choice for association management software, it's far from the only option available. Depending on your organization's unique needs and budget, there are a bevy of software alternatives for you to explore.

Our recommendation for association management software that clicks.

MemberClicks offers two membership management solutions depending on your organization's needs: MemberClicks Professional and MemberClicksTrade.



MemberClicks Professional
Best AMS for professional associations

With MC Professional you get:

- A membership database to store and track member data
- An online payment system with dues automation features
- An event registration platform to improve attendee experience
- Communication features to help you send emails and automate messages
- A beautiful website builder and management system to easily build a new site or integrate your existing site with member database tools
- Community building resources to increase member engagement through messaging, discussion forums and blogs
- Reporting and analytics features to collect data you can actually use

A Our top 3 features include:

- Automation to save you time
- System integration so you can use all your tools in one place
- Cloud-based software you can use anywhere on any device.

MemberClicks Trade
Best AMS for chambers, trade associations and larger professional associations

MC Trade is great for:

- Understand who your members are with member-specific data tracking
- Planning, promoting and running events that members will love
- Financial management tools that are built to work with your current accounting system so you can manage your bookkeeping and accounting from one place
- Custom reporting features to help you make data-driven decisions
- Customizing member emails with audience segmentation
- Building a beautiful website to grow your brand credibility

MC trade is great for you if you want to:

- Build deeper, more meaningful relationships
- Make data-driven decisions and track insights based on your goals
- Use one platform to manage all aspects of your organization

WildApricot
Best AMS for small or growing associations and nonprofits

WildApricot can help you with:

- Online payment processing for membership dues, donations and event registration
- Creating a beautiful organization website your members will love
- Build custom forms to collect member applications, event registration data and more
- Gather all member data into one place to track engagement, contact information and more
- Use member data to send texts, make phone calls, email outreach and more

WildApricot is great for you if you:

- Are looking for a first-time membership management tool
- Are run by volunteers and need less support
- Have small member numbers and are ready to streamline processes

Section 8: AMS Selection Checklist



We hope this has been a valuable guide to set you in the right direction with your upcoming AMS selection. As a final offering, the checklist below can be found here as well, and is a great way to begin thinking through your needs and what AMS system is best for your organization.

AMS CHECKLIST

Checklist and tips for choosing the right software provider

Continue to next page

Features Offered

Just like associations, not all AMS providers are alike. Some are web-based, while others are cloud-based. Some are designed with smaller associations in mind, while others cater to vast corporations. Remember to keep your must-haves front and center. This first section offers a comprehensive list of considerations on core features, one of the most important components of your new AMS. The features section covers both general and specific concerns, with questions about fit, return on investment and flexibility first, followed by questions on email communications, event management and invoicing.

What to Consider	Tips to Guide the Process	Provider 1	Provider 2	Provider 3
Does the software offer all of the primary features your organization needs to be successful?	Think about your must-haves. Does the system offer the capabilities that matter to you most?	☐	☐	☐
Is the software a good fit for your business model?	Organizations have unique needs. What works great for one doesn't always work for another. Be sure the software solution meets the needs of your organization based on your business model.	☐	☐	☐
Does the software pay for itself?	The system should ultimately add to your bottom line. How does the vendor help you get a return on your investment?	☐	☐	☐
Is the system flexible and configurable?	Invest in a system that's flexible and that can grow as your organization grows.	☐	☐	☐
Does the system offer features needed to manage your events?	Consider if the software's event capabilities handle larger event needs, include features like promo codes, automatically update event info on your website, print name badges, and include social media sharing.	☐	☐	☐
Are invoicing and accounting tools included?	Look for a system that will help you automate invoicing, handle advanced financial tracking like accrual accounting), and natively integrate with general ledger software, such as QuickBooks™.	☐	☐	☐
Can you easily access presentation-ready reports and get the data you need to make better business decisions?	Ask if standard reports are provided, if you can create custom fields, and if data can easily be exported for use in other programs, such as Excel.	☐	☐	☐
Does the system offer features designed to help you grow your membership and retain existing members?	Look for a system that provides member self-service. Will the system give your members additional exposure to gain new business? How will the new system allow you to better engage your members?	☐	☐	☐

Features Offered Cont.

Keep in Mind: While must-have features differ between associations, there are a few you'll almost definitely want to have on deck. These may include a robust member database, a website builder, dues and application collection, email marketing, event management, online community features and reporting capabilities. Depending on your needs, AI or automation capabilities may also be valuable to support efficiency or engagement goals. Finally, remember scalability, user-friendly interface and good support.

What to Consider	Tips to Guide the Process	Provider 1	Provider 2	Provider 3
Can you email specific groups of members and prospects directly from the system?	Determine your need for features like personalization, segmentation and automation.	☐	☐	☐
Is a website content management system available?	Is website design, development, and hosting available? Is the site easy to keep updated with text, additional pages, photos and videos? Does the website talk to your database, making real-times changes as your data is updated?	☐	☐	☐
Does the platform help drive traffic to your website?	Your website should help establish your organization as the #1 resource in your community or industry. Consider if the vendor provides website services and best practices for providing a strong online presence.	☐	☐	☐
Have the needs of each department in your organization been evaluated and matched with the software you are considering? Is the platform intuitive enough to help them perform their job better?	Be sure each member of your staff is comfortable with the new platform, and has had the opportunity to get all of their questions or concerns answered.	☐	☐	☐
Does this AMS avoid everything I listed on my "deal-breakers" list?	Remember to weigh the negatives along with the positives. If the provider includes something you definitely don't want to pay for or lacks something you know you need, that can be just as important as including all your must-haves.	☐	☐	☐
Does this AMS offer AI or other automation features?	If AI or automation features align with your needs, look for terms like "AI-powered," "adaptive learning" or "automated outreach" in vendor materials.	☐	☐	☐
	Features Offered Score			

2 Efficiencies

Next up to consider: how efficient is each AMS system on your list? Efficiency is key to any association, especially when selecting an AMS. Afterall, you want your new software to make your life easier, not harder. For this checklist, we've considered everything you'll need for your AMS to integrate seamlessly with your association and any preexisting systems. If the options on your list tick fewer than three of these boxes, they may have to be scrapped.

What to Consider	Tips to Guide the Process	Provider 1	Provider 2	Provider 3
Is the software "all-in-one?"	Are additional systems still required? Will you be able to get away from keeping data in multiple places?	☐	☐	☐
If the software is all-in-one, how well do the components work together?	Automation is key! Components should talk to each other and update automatically so you don't have to constantly import and export data. This will save time and ensure your data is accurate.	☐	☐	☐
Will you be able to save time with the new system?	Your software should help you reduce the time it takes to complete your regular tasks.	☐	☐	☐
Can the software be used outside the office?	It's critical to have the flexibility to work with data anywhere in today's mobile-centric world.	☐	☐	☐
Can this software be used by employees or members in multiple countries or time zones, if that's relevant to you?	Thanks to the work-from-home boom, many associations today operate internationally or in multiple time zones. If that's you, be sure your provider of choice can accommodate you and your members!	☐	☐	☐
		Efficiencies Score		

More Food for Thought:

Not only will you be able to save time with an all-in-one solution, but you'll be able to save money by eliminating multiple subscriptions to manage your various operations.

3 Company Experience and Reliability

Before going to a restaurant or buying a product online, do you read the reviews? If you do for smaller purchases, you certainly should before buying an AMS! Looking into not only the features and efficiencies of new software but also the provider's reputation is crucial to the decision-making process. If you can, consider asking other associations in your industry for recommendations, both on who to consider and who to avoid. Remember to read reviews, both good and bad, look into the company's history and track record and data and privacy policies before making a final decision.

What to Consider	Tips to Guide the Process	Provider 1	Provider 2	Provider 3
Does the software provider work with other organizations in your industry?	Make sure the company understands your business and unique needs.	☐	☐	☐
Has the company been in business for more than 5 years?	Being around for a few years is a good indication that they are healthy, stable, and satisfying the needs of their clients. Recently formed companies may lack the experience, standard operating procedures, or staff to provide the level of service your company requires.	☐	☐	☐
Does the company have a high customer retention rate?	Find out if the company is keeping their clients satisfied. Start by searching online reviews to see the kind of service levels they provide.	☐	☐	☐
Will you continue to own all of your own data?	Ensure that you have complete control over and access to your data.	☐	☐	☐
Does the provider have a proven track record available on their website in the form of case studies, testimonials or reviews?	Providers should not only have proven success in helping associations achieve their goals but should also be transparent about how they've done so. Look for video testimonies or direct quotes from clients attesting to the provider's efficacy.	☐	☐	☐
	Company Experience and Reliability Score			

4 Future-Oriented

It's important not to get wrapped up in the shiny newness of an AMS. While features, benefits and even aesthetics all have their place, it's important to focus on the longevity of your new solution too. An AMS provider that offers thoughtful AI tools may be better equipped to grow with your organization over time, but make sure those tools are useful and aligned with your strategy. Overall, you want to look for characteristics that show a commitment to long-term growth such as scalability,

What to Consider	Tips to Guide the Process	Provider 1	Provider 2	Provider 3
Does the vendor offer partnerships or integrations with other companies?	Integrations offer more possibilities to expand efficiencies and member benefits. Even if you don't need them today, you may want to utilize them in the future.	☐	☐	☐
Does the vendor offer additional product packages with more advanced features?	It's important to consider if you might quickly outgrow the system, or if the solution has additional offerings designed to grow with you.	☐	☐	☐
Does the software offer frequent updates at no additional cost to you?	In a world that's always evolving, picking a provider that is forward-thinking and evolving themselves is important.	☐	☐	☐
Does the company regularly update the program in response to customer feedback?	Without constant feedback and upgrades, even the best software can become stagnant. Make sure your software provider has a clear process for customer feedback and regularly acts on that feedback with frequent software updates.	☐	☐	☐
Does the platform offer mobile friendly options for members?	With so many of us dependent on and even doing business from our cell phones now, mobile friendly or in-app options are a must-have for member engagement!	☐	☐	☐
	Future-Oriented Score			

Think About It:

A lot of software is similar in terms of features and functions, but the companies who value customer feedback and strive for continuous improvement are the ones who set themselves apart — and the ones you ultimately want to work with.

Implementation, Training, and Support

An AMS can check off every single one of your must-have features, but what good is that if you don't know how to use them? Before you make any commitments, ensure the provider you choose will be there to offer training, support and resources during the implementation process and throughout your journey together. Some tips for determining this include scheduling demos, tracking response time in communications and checking the provider's "resources" tab to browse the selection and frequency of uploads. If the provider is responsive, offers comprehensive demos and a plethora of resources to help you succeed, that's three huge points in their favor already!

What to Consider	Tips to Guide the Process	Provider 1	Provider 2	Provider 3
Does the company provide training opportunities to get you started quickly and successfully?	The company should be able to provide training for your staff so they can quickly become proficient and get the most from what the software offers.	☐	☐	☐
Does the vendor provide ongoing training and resources?	Consider what resources are available for both existing staff and new staff (training webinars, best practices for using the system, etc.).	☐	☐	☐
Will you be able to move all necessary data over quickly to your new system?	Check what data conversion services are available and if they meet your needs.	☐	☐	☐
Is the company's support staff responsive and experienced?	Request information about the response times and number of support staff, as well as how and when they can be reached.	☐	☐	☐
Does the company have a conference for its users?	By offering opportunities for users to gather and develop their product skills together, a company shows its dedication to continual training and the fostering of a community of users.	☐	☐	☐
Does the provider offer a library of resources to help you make the most of their offerings?	A suite of features is one thing, but support on how to use them is quite another. A robust resource library not only shows that your provider wants to help you succeed but will also ensure you make the absolute most out of your investment.	☐	☐	☐
Does the website include an AI chatbot for 24/7 support?	While speaking to a representative one-on-one may be your first choice, it isn't always available. Be sure you can reach the company in some way around the clock in case you need immediate support.	☐	☐	☐
	Implementation, Training and Support Score			

Side-By-Side Provider Comparison

It's time to make your final decision! You've come a long way and have done a lot of hard work to determine the absolute best fit for your association, so give yourself a quick pat on the back. In this last section, consider what each option brings to the table in total: your must-have features, deal-breakers, efficiencies, reliability, future-oriented posture and support. For each option, write the score you tallied at the end of each section, then calculate the grand total at the bottom.

Note:

While going by the numbers is the obvious choice (top score = winner), remember that if it's an especially close race, you can take into consideration your gut feeling and any considerations we may not have listed here that are still important to you. Whatever your final decision, make sure you and your team feel fully confident going forward. Good luck!

Items Compared	Notes	Provider 1	Provider 2	Provider 3
Features Offered				
Efficiencies				
Company Experience and Reliability				
Future-Oriented				
Implementation, Training, and Support				
	Total Scores			

Thanks for reading!



Personify®
MemberClicks