

Get Rid Of That Junk Drawer – 5 Steps To Organizing Your Chapter Management Systems



Everybody's kitchen has one. That drawer that's overflowing with all those things you don't have a place for. Things you use regularly, things you need but can't find, things you don't need, and those things you've forgotten you had. In theory, there's nothing wrong with having a single place for all those things you use sometimes to rarely. But is that drawer really helpful or do some of us need some help with our hoarding problem?



As odd as it sounds, that kitchen junk drawer is kind of like the overflowing bucket many chapters have; it's the same as the combined platform they use to run their association chapter.

Can you easily list all the paid and free systems you use (and find the log on information for them)? What about those you know about but don't use, those you've forgotten you have and those you don't use but you continue to pay for each year? Spring and summer could be a great time for a check-in, to see what you really need, what's missing from your chapter management systems and what you really can get rid of. This would be a great activity to combine with a chapter health check, where you get a detailed picture of how things are going while also highlighting potential business problems.

The five steps of an association chapter software clean out

Step 1: Gather what you have

The critical first step is to get an understanding of all the systems you have. If you haven't already, put together a list of all your programs, their use and all their passwords. We'd bet that you probably search for at least a few passwords, as you probably don't have everything stored in one place.

Step 2: Set up a plan for ownership

Next, it's time to figure out which of those systems you really need. It could make sense for the whole board to work through this together. But to keep from overwhelming your already stretched chapter volunteers, it might be better to split up the list and have different board members be responsible for different platforms.

Maybe the president researches the effectiveness of your chapter newsletter, your VP handles the website, your marketing group overseeing the review of your communications software, membership takes the chapter event registration software, the treasurer takes the payment software, etc.

Step 3: Measure the real costs of each system

The dollars you spend to maintain each system are important, but what are your real costs? Think about the time your volunteers spend working with each system. And the time your members spend using them. Are these systems easy to use for both groups, or do you consistently hear rumblings that they wished there were other options? Are you, for example, using Excel to track chapter event registrations but to complete the registration and pay to attend, members have to register one way and pay through another? Try to quantify how much time your chapter spends "interacting" with all those systems. Is it much more or less and better or worse than you expected?

Step 4: Bring in the essentials

Once you have a good handle on what you have and what you use it for, think about the gaps. What do you no longer use that you can easily cancel and delete? Are there foundational activities you need to do a better job at – registration, online payment, sending emails, tracking members, etc. – and do you need new online systems for those? This is the time to do your research and find those systems that will make it easier for your board and your members to engage with your chapter.

Step 5: Reassess your needs

Now that you have your foundational programs in place, you should find that things are operating more efficiently. And you may even be saving your chapter some money. Are there any new initiatives



that you'd like to bring on that you just couldn't do with your mishmash of chapter management systems?

How about that sponsorship program you always wanted to start, or maybe you can finally add additional sections on your website like forums and a members only content hub. Armed with the knowledge you have after the exercise you just completed, you'll more easily be able to find the exact platform you need.

This is a useful exercise and one you can repeat regularly, to make sure you didn't miss any critical systems you need and don't have, and no unnecessary ones have snuck their way in.

Chapters have another option – once you have a clear understanding of the tools you really need to run your chapter effectively, an association management system (AMS), can help you eliminate your junk drawer once and for all. Implementing an AMS would give you a single tool that give you one stop access to all the chapter management systems you need. Not only would it be easy to use and manage, but there would be no more hunting for all those elusive logons and passwords. Want to learn more about what an AMS is and how it can help you manage your association chapter smarter?

Let's talk.

