

Making A Smooth Move From Your Old AMS To The New One



You know that your association management system (AMS) no longer meets your chapter's needs, and maybe you've even scoped out one to replace it. Everyone is super excited about the idea of moving to a system that can handle all your association chapter needs as it continues to grow and expand.

And then, crickets.



What's keeping you from making the move from an old AMS to a new one? If you're holding back simply because you think it's going to be a long, drawn out, difficult process, let those feelings go. We're here to tell you that's doesn't have to be the case. With an AMS migration plan that includes a few critical items, your move will go much more smoothly than anyone expected.

The 4 Things That Need to be in Your AMS Migration Plan

Timing: Include enough time in your schedule to keep the two systems running simultaneously for a bit. It's not a good idea to switch off your old AMS before the new system is completely running and (most) users are getting comfortable working in it. Running the two together for a period lets you be sure everything you need to move to the new AMS has transferred and the new system works as it needs to. As for how long to run them together, we generally recommend one month. A month gives

you enough time to get your new AMS running, while also keeping back-end access to your old AMS, in case you need to pull over something you'd forgotten.

Information: Create an AMS checklist of the items you want to be sure to export from your original system, like your member contact list, mailing list, photos, documents, financial reports, etc., and check each one off as you move it over. If you've included time for the two AMS systems to run simultaneously, you'll be able to access anything you've forgotten, but for an extra level of safety consider copying everything and saving these copies to something like Drop Box or Google Drive. Keeping this backup will allow your board members to access that information and subsequently migrate anything they'd forgotten or hadn't allocated time to.

Activities: In addition to having a project manager to keep everything running smoothly, you'll want to let people "play around" in the system a bit and start to make edits as soon as you get access. This is another effective way to help ensure things run more smoothly, both during your transition and once the new AMS system is live. Letting this happen will allow your board, committees, and your volunteers, to feel more comfortable moving around and completing tasks on the new platform. Provide relevant, explanatory communications to your different user groups, and be sure to give them time to practice completing tasks and reviewing the different areas of the system.

Training: Make sure anyone who will be using the system once it goes live gets the training they need before your old AMS system is turned off. Since it can be hard to bring everyone together for training, whether you try to do it in-person or virtually, training videos are a great option. If the AMS you're moving to doesn't have videos, your project manager, your board, etc., can record short training videos that cover completing key tasks, like registering and paying for an event, reviewing membership information and writing a blog post. Suggest to users that they first try to complete a task and then watch a training video on that specific task. It's often much more effective to go through training after you've tried to do something on your own. (StarChapter has a number of board training videos and videos on specific tasks for working with our AMS platform.)

Following basic guidance like this, and adding in other critical tasks, will lead to a stronger, more effective transition. Don't shut down the idea of moving to a new AMS just because it seems like it'll be so much. It's not as hard as you think it is.

