

# Moving To A New AMS: Tips From A StarChapter Implementation Expert



When an association chapter decides to transition to a new association management system (AMS), everyone in the chapter starts to worry. Will the move go as expected? Will it be easy to use, both as an administrator and a member? Do we have all the passwords we need? Will the transition be seamless? Is there anything we may have forgotten? The questions just keep coming.



But the move to a new AMS doesn't have to be a stressful experience, if you take the time to get input from those who will be using the system and develop a transition plan. For some pointers on the some of the critical activities chapters need to plan for in the short and longer term when moving to a new AMS, we spoke with Dana Ingle, the StarChapter, CAPM Team Lead of Implementation.

## **What are the general critical elements for a system to go live?**

A major, critical element, and one many customers don't always consider, is to not rush. Before you move to your new system, evaluate your current AMS, as well as systems you've used in the past. What options does your current system have that you never use? Is there something about a previous service that you wish you still had access to or that you will need to ensure that some of your outside platforms will still work with your new AMS? Make that list and check it against the AMS you're moving to, before you make the move.

Some organizations may be able to cancel some of their services, as their new AMS will offer them. And other services, like domain and email providers, will still work in conjunction with the new platform.

Training is another area that needs to be considered before a new AMS goes live. What training will your users need before, during and after launch? For a high-level picture of how the system works, start your AMS training with the self-help section of the AMS knowledgebase. Once you have full system access, but before launch, have your users begin navigating the system. Prior to launch, schedule training with the AMS support team, for before or after the system goes live.

### **What's the best way to integrate an AMS into a chapter's existing workflow?**

An AMS will improve how a chapter operates. But at the same time, it's critical that the move to the new system is worked into a chapter's "regular" workflow, so it doesn't cause stress to, or break the flow of, chapter business, and derail all the good work members have come to expect. To help ensure integration is smooth, chapters should include:

**A kickoff meeting and training.** Put everyone on the same page before the project starts and give them the training they need to use and maintain the system once it's live.

**Dedicated follow up time.** Block time on your calendars after the initial kick off, to collect any requested materials and review meeting notes. After that initial meeting, schedule blocks weekly during the implementation to review the status and manage requests as they arise.

**A timeline.** This puts everything into perspective and formats what needs to be accomplished and when, with the understanding that some activities may change depending on project specifics. StarChapter has developed an AMS knowledgebase resource that contains our project timelines and the materials we and our clients need during a StarChapter AMS transition.

### **What does success look like in the first 30 days of going live?**

To ensure your users are successful using the AMS, once it goes live, there are some things you'll want to do. That includes:

- Sending a welcome email with any necessary links and contacts for questions. You'll need multiple emails as the one you send to your board will differ from the one to your members.



Understand what each group will need to know and address those appropriately in these initial communications.

- Testing, and having ready to use, all the payment processing aspects of the platform. Ask your VP of finance, your accountant and several chapter members, to help you test these.
- Establishing scheduled emails. An AMS is great for improving a chapter's email strategy. In the first month, strategize about how you can use it, to keep members, your board, your vendors, sponsors, etc. better informed. One of your first emails should cover training and driving members to visit the AMS to ensure their contact information is up to date.
- Creating a schedule of future meetings to ensure a strong relationship with the AMS vendor and that any issues are addressed and resolved before they become significant.

### **What are some AMS projects that could wait until after the transition is complete?**

Of course, when you move to a new AMS, you and your board will want to use it for everything right from the start. But for the majority of chapters, that isn't feasible. There will be just too much to get done. They may be clamoring for options like these, but these are typically lower priority for implementation content migration and can wait.

- Adding community tools, like your chapter blog, announcement page or newsletter
- Migrating chapter archive materials, including old meeting details, photo galleries and documentation.

### **What are some AMS additions for chapters once an AMS is up and running?**

The bonus of having a chapter AMS is that chapters can find countless ways to use the system, to improve how they manage the chapter, interact with members and member guests, expand their sponsorship program, and more. Once you feel your board and your members are comfortable using the basics of the system, explore ways to:

- Add additional revenue streams, like a sponsorship program, paid job listings for non-members, merchandise, etc.
- Offer additional training to answer questions that may be coming up or that you have been collecting
- Review the impact of the AMS on membership, event attendance, revenue and more. The StarChapter AMS for example, has countless reports in these areas.



## Additional AMS transition guidance

We've written extensively about making the transition to a new AMS a smooth one, each covering different aspects. Here are a few other posts that can help your chapter, your board and your members be better prepared for your new AMS.

- [Transitioning to a new AMS doesn't have to be Overwhelming](#)
- [Moving to an AMS – 6 steps to success](#)
- [Making A Smooth Move From Your Old AMS To The New One](#)

Each AMS transition is different. The exact steps depend on the systems you have in place, and how those tasks need to be migrated to the new AMS. But the overall key to a successful AMS transition is organization. And organization means planning ahead and allowing enough time to pull everything together and think about all those things you could be forgetting.

