

Moving To An AMS – 6 Steps To Success



You've decided to move to an Association Management System (AMS) from the combination of free and paid services you've been using to manage your association chapter.



If you're like many chapter organizations, you're using different systems to manage your:

- Email
- Blog
- Membership
- Event registration
- And more.

Moving to an AMS is a fantastic choice that can save you time, improve your association chapter volunteer and member engagement, and more. But even though you're ready to make the shift there's a good chance there are probably some on your association chapter board second guessing the decision. And it's not the decision to move they're worried about.

They're probably more than a little concerned about the work that lies ahead and wonder if it will take the equivalent of a part-time person to get it all done. Rest easy. With some prework and a plan, your shift to using an all-in-one AMS to manage the different aspects of your chapter can be a smooth one.



Here are a few things we recommend boards do before they start to be as prepared as they can be, lower the chances for error, and streamline the transition process.

1. **Assign a project lead.** Once you've chosen the AMS, there's no need to have every board member involved in every aspect of the project. Select one person to communicate with the AMS project manager and the board throughout the project. That person should be available for the length of the project — someone taking off two weeks off in the middle probably isn't the right person. In addition, it's best practice to have a backup contact to assist as needed and stay up to date.
2. **Understand your content priorities.** Be clear on what needs to transfer to your new AMS. If you have an association chapter blog or take online event registration on your website, you'll want them to move to the new site. What doesn't need to move at all? Maybe you can eliminate those 20-year-old newsletters or chapter meeting notes. And finally, what needs to be updated as part of the move? When was the last time you reviewed your membership list?
3. **Get a complete membership list.** Compile a current list of members and updated contact information. If your parent organization manages your membership, request an up-to-date association chapter membership list from them. Here are a few ways to make that list easy to transfer and as current as possible.
 - a. Have each field of information in a separate column on the membership spreadsheet, e.g., break member addresses into separate fields including street address, unit number, city, state, and zip.
 - b. Identify each person's membership type – member, retiree, student, guest, etc.
 - c. Include expiration dates – if a member has a past expiration date, they shouldn't be on your active member list.
4. **Make a list of all the services you're currently using.** One of the reasons you're moving to an AMS is to consolidate all your systems into one. To do that successfully, you need a complete list of all the different platforms and services your chapter uses, like your Web host, domain registrar, email provider, etc. You'll also need all your log in and password information, which means you might need to contact multiple people to get it.
5. **Find the high-resolution copy of your logo.** There's nothing worse than realizing you don't know who has the design files for your association chapter logo and having to recreate it. If you



can't easily find the logo file (could it be an outside design firm?), ask a past board member or someone in your parent organization; National organizations often keep copies of chapter logos.

6. **Tax exempt documentation.** This documentation needs to be uploaded in the AMS, and once it is you won't need a hard copy. Also, if the AMS has documentation that your organization is tax exempt, you won't be charged sales tax for certain services.

We're not saying these are all you need to do to successfully move to an AMS. These are just some of the most important steps. Completing them before you start the move will make your transition to an AMS go more smoothly than if you must stop at each step and pull things together. Here are two other things you'll also want to get done early; we recommend completing the six above before starting on these.

- Ask National for any branding guidelines. If there are association chapter branding guidelines, having them before you start will ensure your website reflects the individuality of your chapter while following the requirements of your National organization.
- Collect and clean up your mailings lists. Review your mailing lists to make sure you still need all of them and that you have the correct email addresses for the lists you're keeping, to decrease the number of bounce backs you'll get once you start using the AMS for your association chapter email communications.

Moving to an AMS doesn't have to be a complex, long process, if you go into it as prepared as you can be. Completing what we've outlined here will help you avoid those six-month delays that often happen in the middle of a project when you realize you forgot something critical.

