

BROUGHT TO YOU BY



LEAGUE OF  
ASSOCIATION  
TECHNOLOGISTS

# Invest **WISELY**

GET THE BEST FROM A NEW AMS

February 11, 2026



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ASSOCIATION  
TECHNOLOGISTS

# Invest Wisely...

- ❖ Introductions
- ❖ Where to get information & research
- ❖ What makes you weird?  
(In a good way!)
- ❖ Managing your project for success
- ❖ Get the most out of demos
- ❖ Make some friends
- ❖ Selection Survey Insights
- ❖ Data Governance & Migration Prep



# Our Speakers



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# Ground rules...

- No question is off limits!
- If the question is too specific to a particular situation, we may defer it but are happy to talk to you offline or after the event.
- No need to call out specific vendors.
- This is a safe space, but we understand if you wish to remain anonymous.



# Where to get information & research...

- ❖ ReviewMyAMS.com offers verified reviews by real system users
- ❖ ASAE DemoDays offer virtual demos of AMS systems
- ❖ AMSFest offers concentrated AMS demos over 2 in-person days
- ❖ Collaborate posts offer informal recommendations
- ❖ League of Association Technologists are working on a library of best practices and education sessions (like this one!)



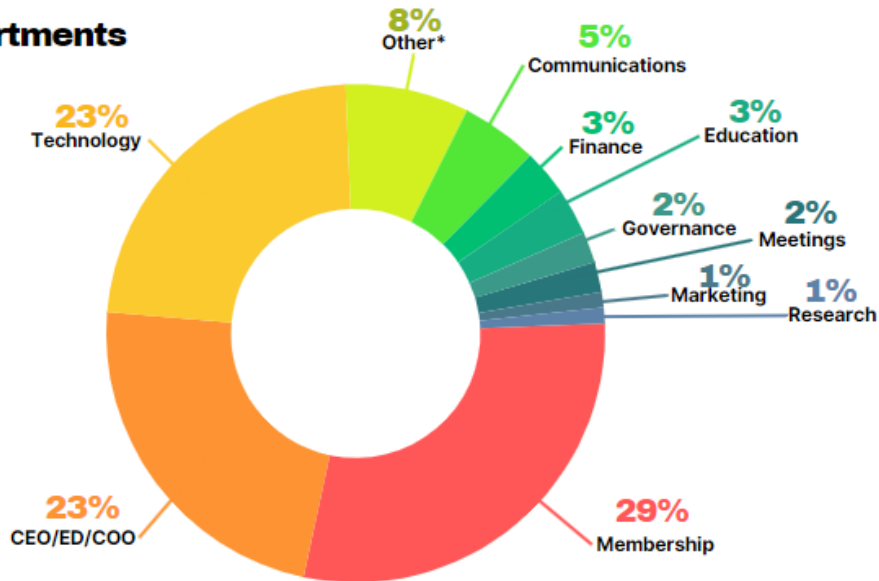
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# Selection Survey Insights

Within association responses we got a good mix of staff sizes and departments and org types

## Departments



## ASSOCIATION STAFF DEMOGRAPHICS

### Organization Type



\*\*Other\* Organization Types included honor societies and certification entities.

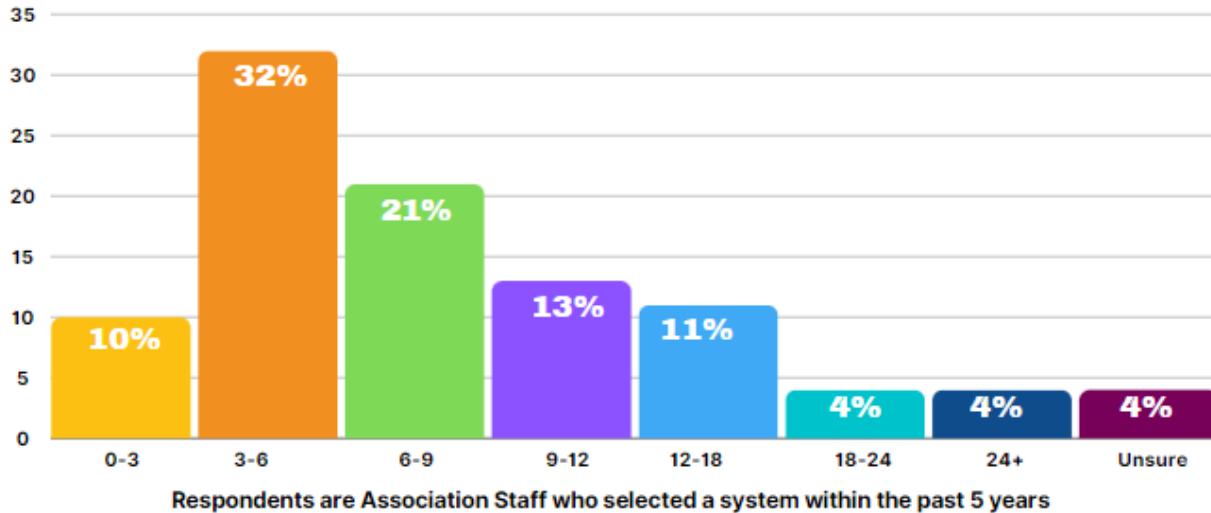
### Number of Employees at Association Staff Organizations



Most Association Staff respondents are based at organizations with 3 to 30 staff.

# Actual projects take longer than expected

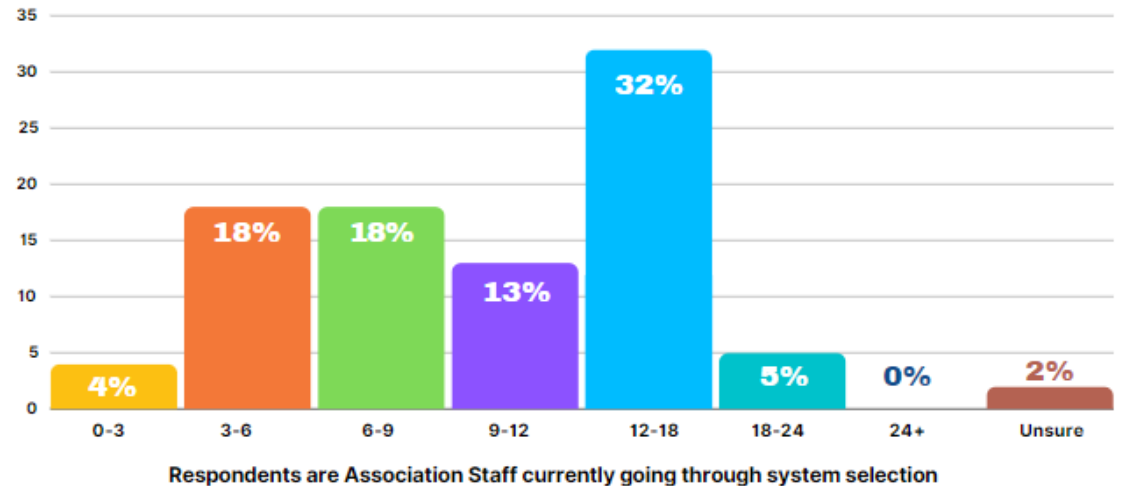
Number of Months b/t deciding system was needed and selecting new system



Looking at selection:

- Some said they were able to do it in 3 months
- 19% took longer than a year

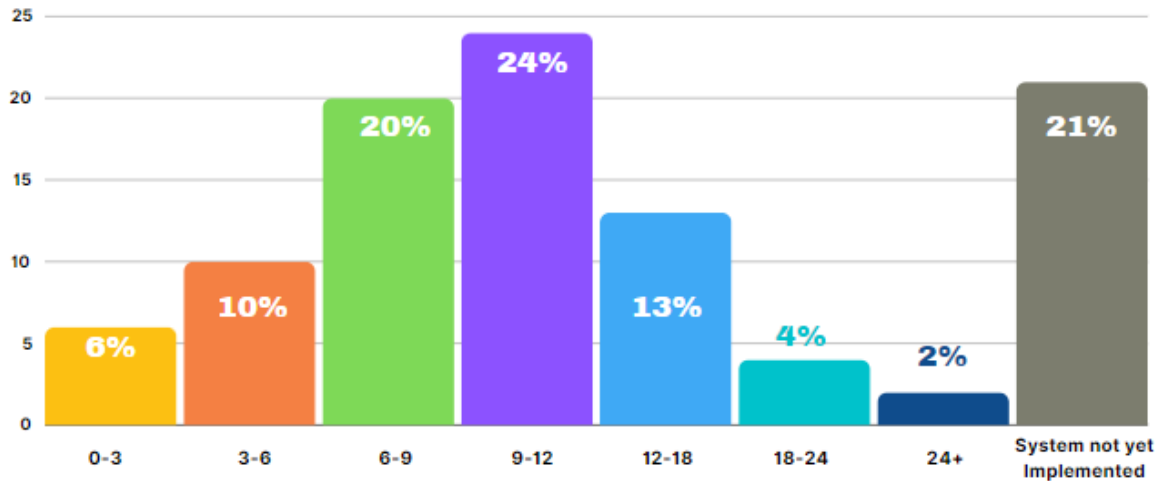
Expected number of months for system selection



## Selection

# Actual projects take longer than expected

Number of Months b/t system selection and system implementation

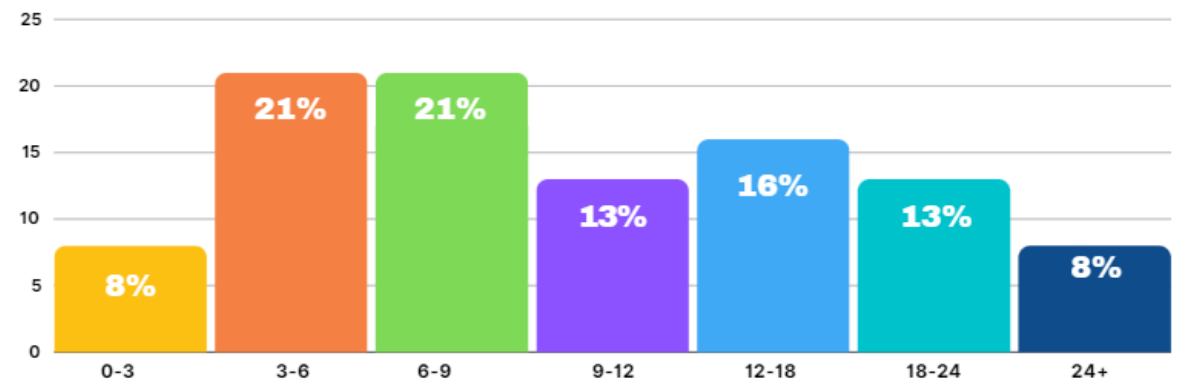


Respondents are Association Staff who selected a system within the past 5 years

Looking at Implementation:

- 6% of respondents said they were able to do it in 3 months
- 19% took longer than a year

Number of months expected b/t system selection and implementation



Respondents are Association Staff currently going through system selection

# Implementation

# Please help! Take the AMS/CRM Software Selection Survey

- This is the 3<sup>rd</sup> edition of this survey project.
- 501Works and Branching Knowledge are conducting the survey to better understand the individual and collective experiences around AMS/CRM Software selection, including what worked well and what caused pain points.
- Association staff, AMCs, software vendors and consultants are all invited to respond.

**The 2025 AMS Selection Survey is open!**



**Help guide the industry plus a chance to win amazon gift cards!**



Visit [https://www.surveymonkey.com/r/2025\\_AMS\\_CRM\\_Selection\\_Survey](https://www.surveymonkey.com/r/2025_AMS_CRM_Selection_Survey)

# What Makes You Weird? (In a Good Way!)

Every group has a few (or more) things that make them special...



# Be Prepared!

- ❖ There are a wide range of solutions available (Add sources for info)
- ❖ Knowing where you fit in the mix will save yourself and the vendors time and energy.
- ❖ A few key things to have at the ready:
  - ❖ Annual budget
  - ❖ Staff Size
  - ❖ Member Size
  - ❖ Type – Professional, Trade, Hybrid
  - ❖ Search Timeframe
  - ❖ Current Pain Points
- ❖ Know when to compromise



# Who You Should Survey

During Your Needs Assessment Venture?



# Everybody!

## Staff

- Membership
- Accounting
- IT
- Customer Service
- Programs
- Events
- Leadership
- Development/Sponsorship
- Publications
- etc.

## Constituents

- Membership
- Leadership
- Volunteers
- Sponsors
- Advisors
- Community Supporters



# Why Everybody?

- Expands perspectives
- Breaks down silos
- Creates understanding
- Develops buy-in
- Universalizes solution



# What Are Your Pillars for Success?

- ❖ What drives your association?
- ❖ Knowing where your association is most active will help drive the key things to focus on – usually 8 to 12 key items.
- ❖ Sample:
  - ❖ Finance
  - ❖ Member Self Service
  - ❖ Membership
  - ❖ Small Events & Webinars
  - ❖ Committees
  - ❖ Journal/Magazine Subscriptions
  - ❖ Tracking CPE Awards
  - ❖ Email Newsletters
  - ❖ Grassroots Advocacy



# PROJECT MANAGEMENT

# The Investigation Phase:

Defining Success  
Beyond Features



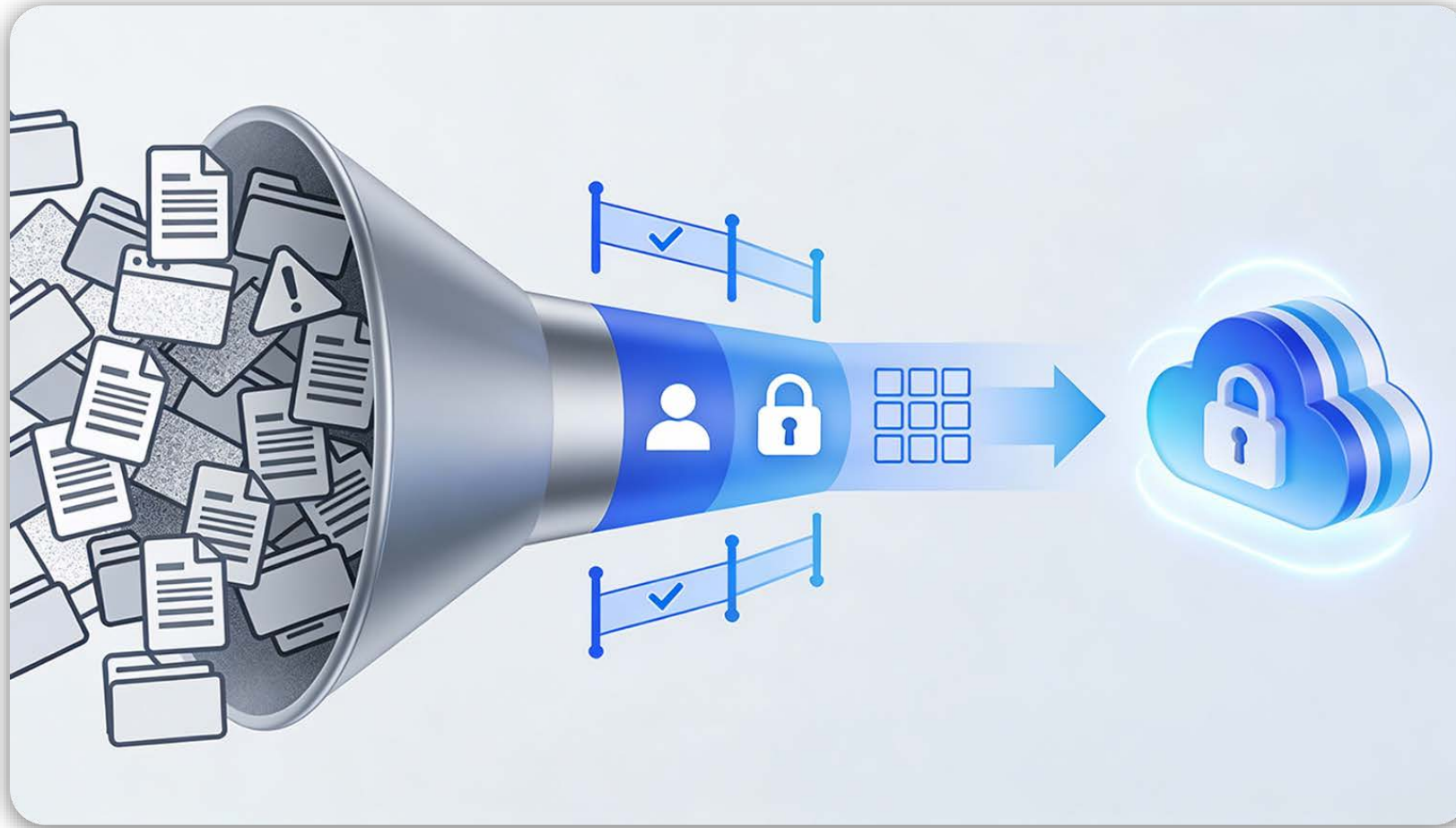
# AMS Horror Stories: When the System Becomes the Problem



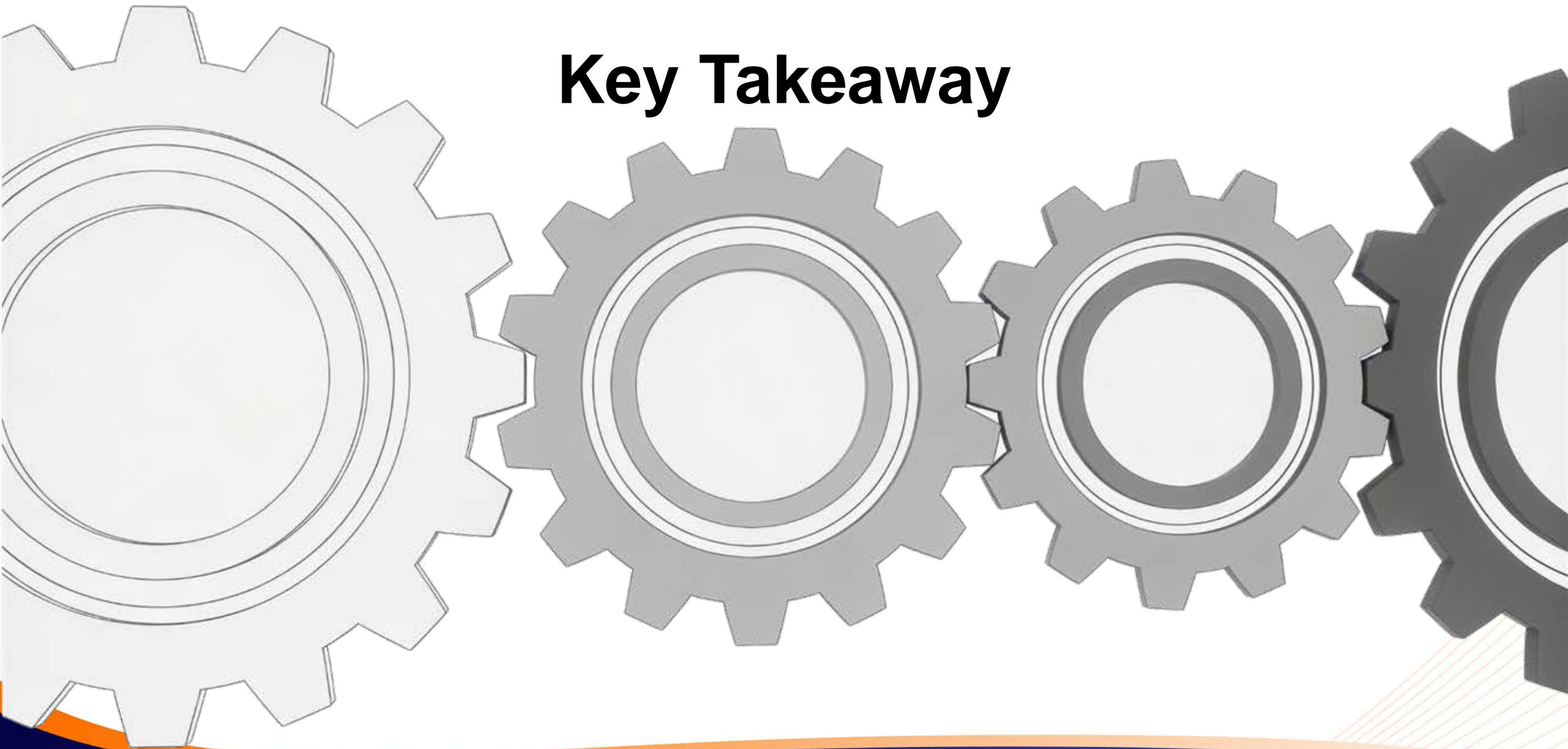
# Process & Stakeholder Audit



# Data Readiness Assessment



# Key Takeaway

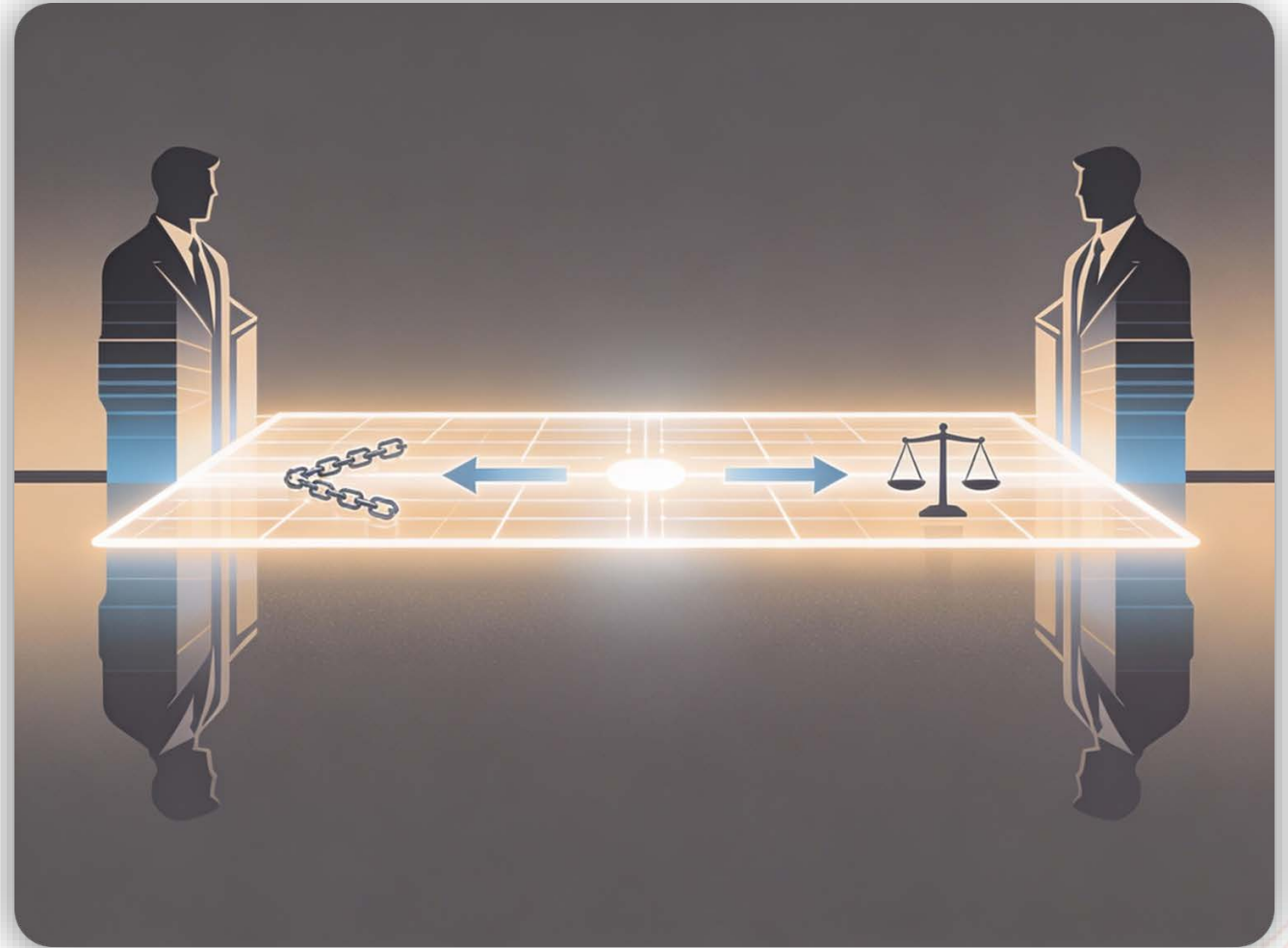


# The 'Everything but the Kitchen Sink' Trap

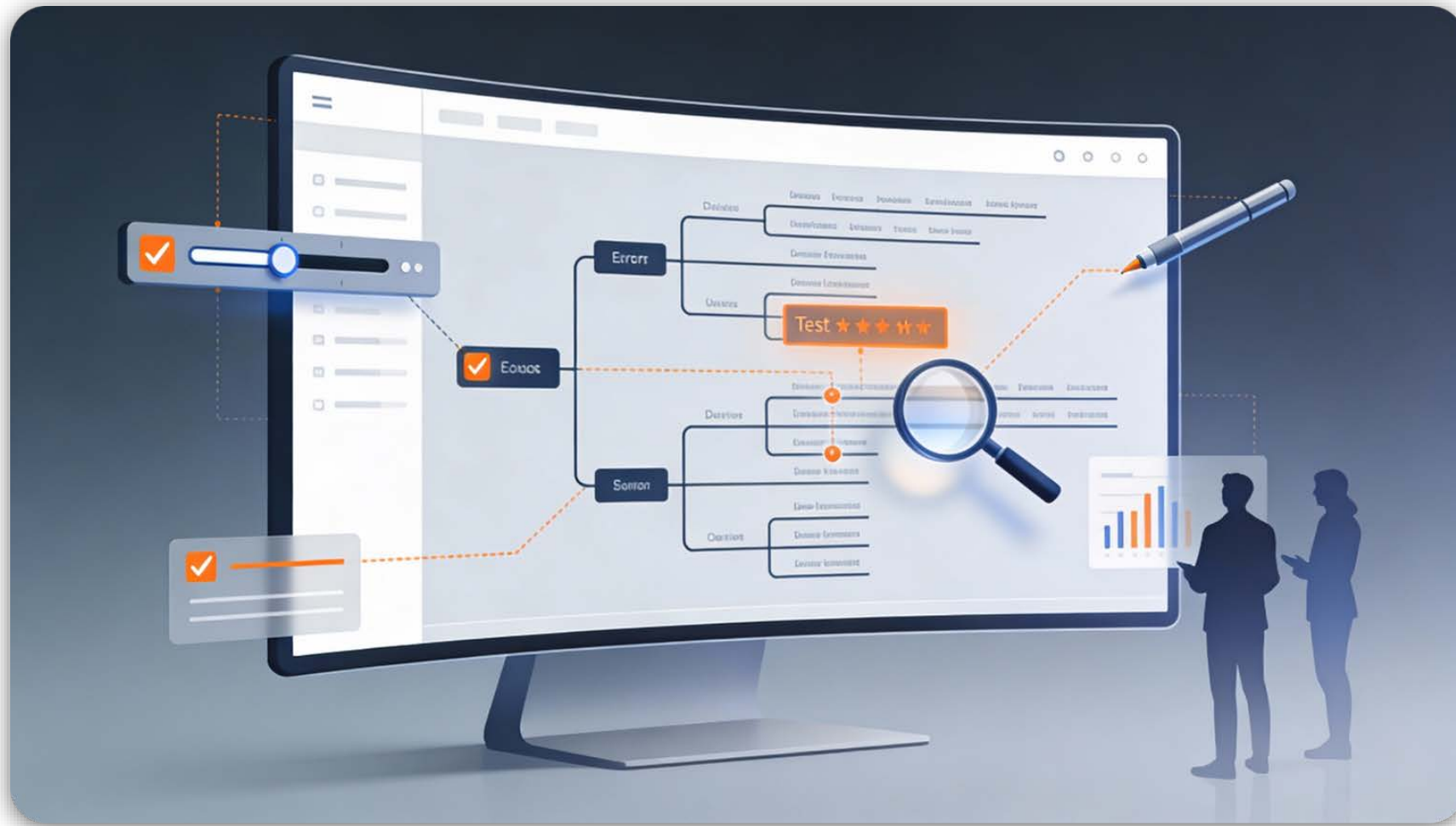


# The Selection Phase:

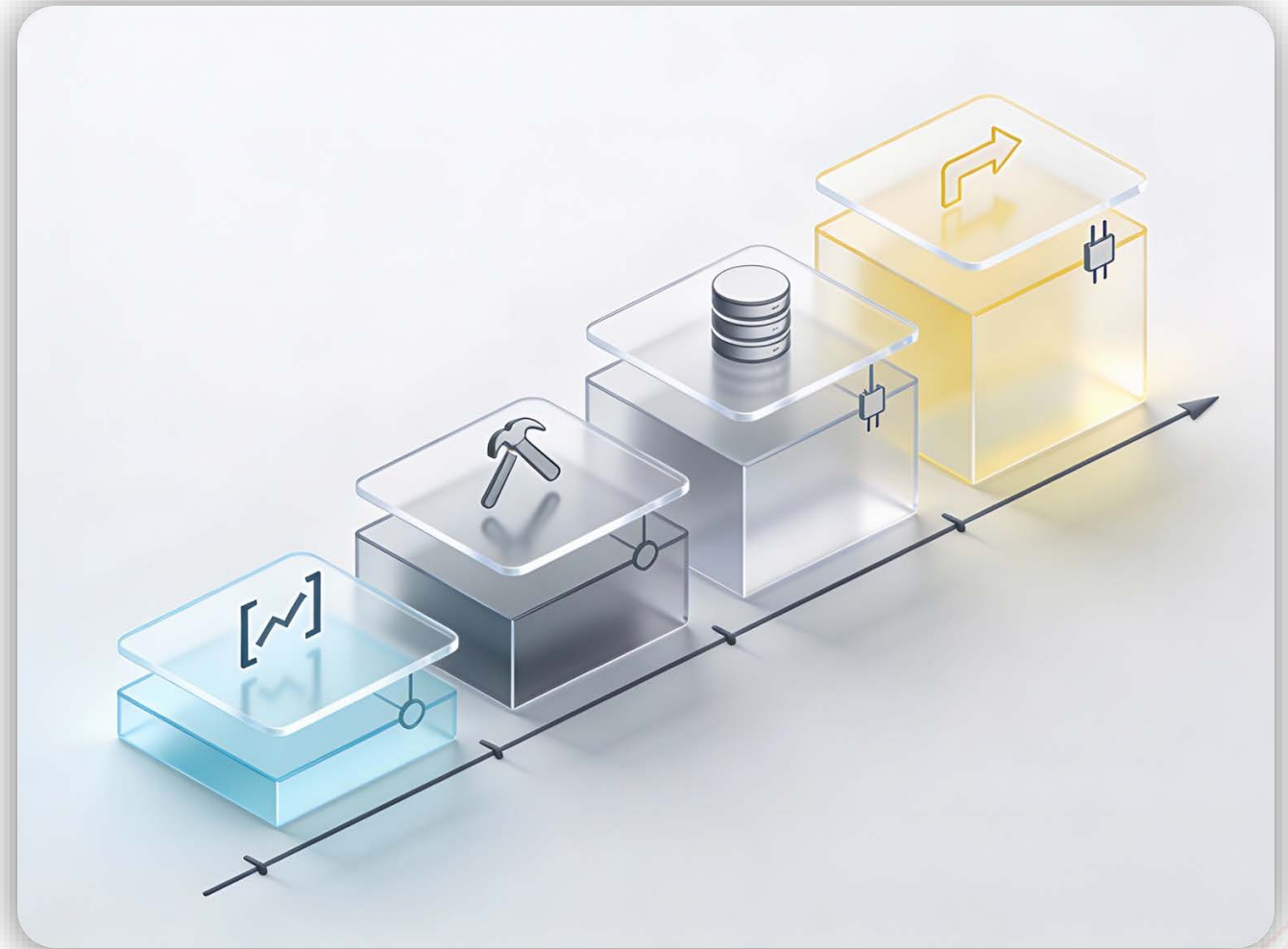
Choosing a Partner, Not  
Just a Product



# Scenario-Based Demos



# Total Cost of Ownership (TCO)



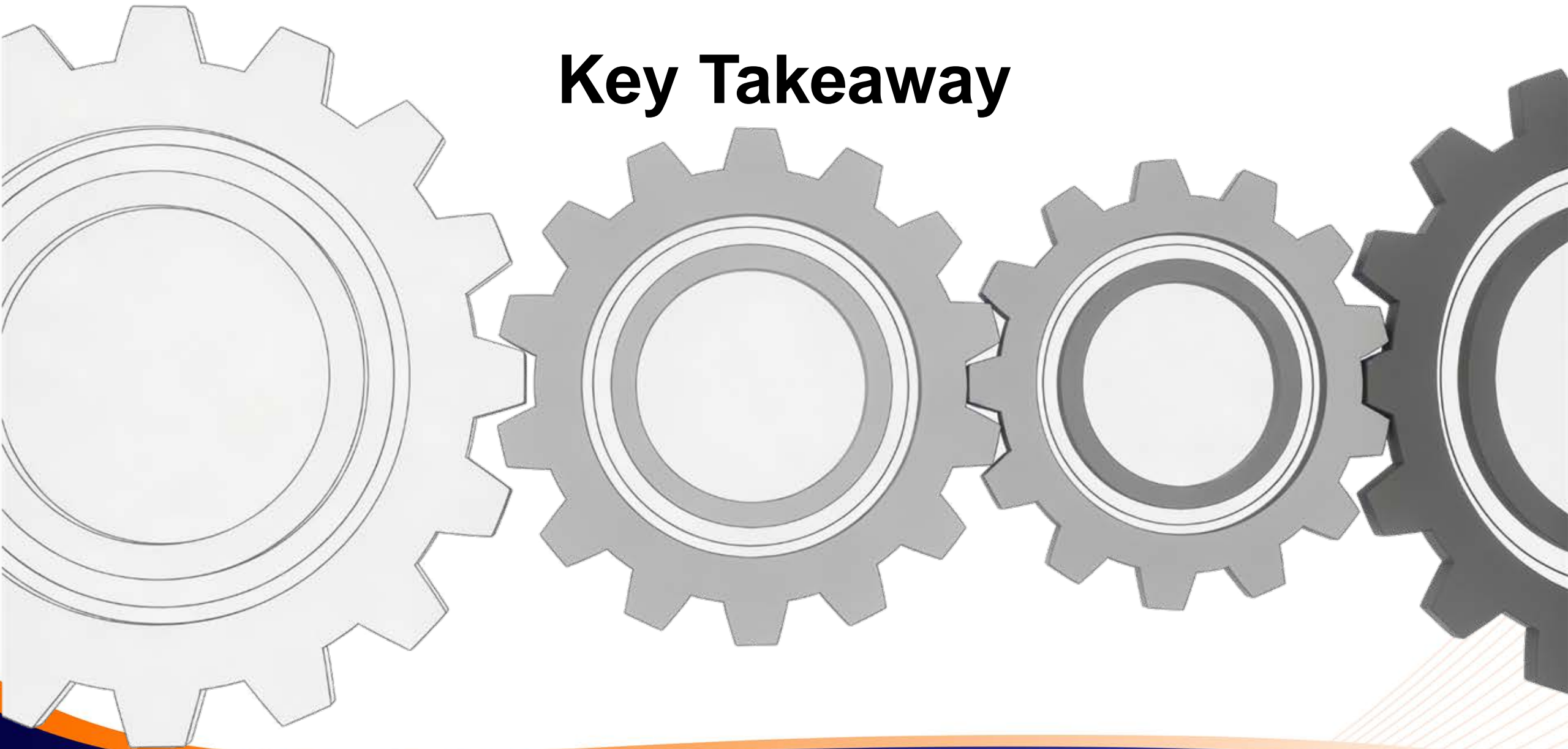


# Implementation Partner Due Diligence



# The 'Clean House' Illusion

# Key Takeaway



# The Implementation Phase: Managing Change and Risk





# Executive Sponsorship & Communication

# The Finance Team's Friday Surprise



# User Acceptance Testing (UAT)





# The 'Ghost Town' Launch

# Training & Post-Launch Support



# Key Takeaway



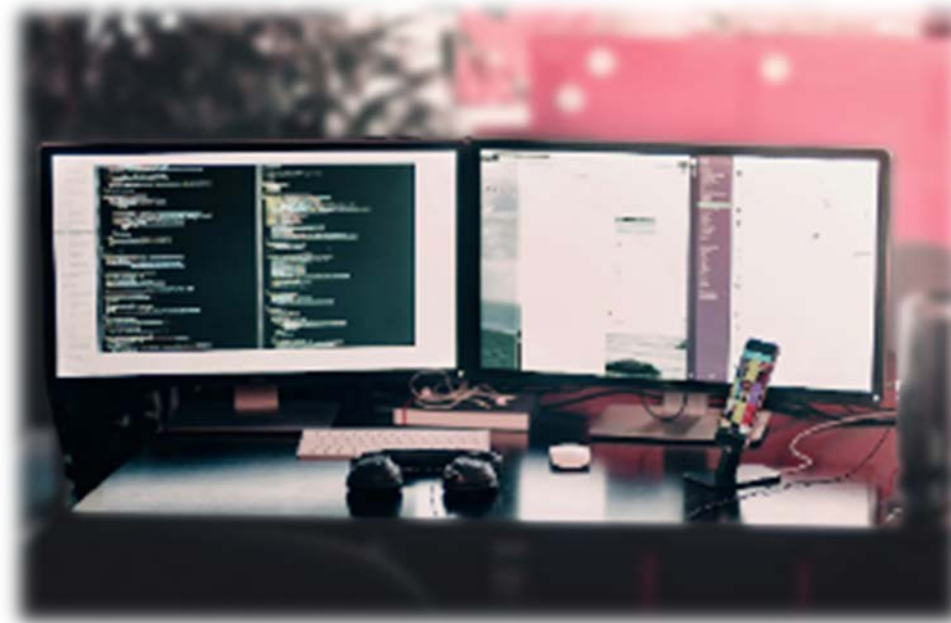
# DATA

**Conversion**

**Migration**

**Validation**

**Governance**





How to have

# SUCCESS

With your new AMS!

# DATA QUALITY

Duplicates – Merged vs Metadata-linked

Missing fields – Nulls, incomplete profiles

Inconsistencies – Formatting, outdated values, prior migrations junk, free-text chaos



Reports to get you started:

- All Customers/never signed in
- Records that haven't been updated in X years
- Null



*“Garbage in equals garbage out, faster” – Confucius (probably)*

# DATA MIGRATION CHECKLIST



## Data Format Risks

- Date and time formats
- Numeric precision and rounding
- Text field length limits
- Character encoding, including special and multi-byte characters
- Line breaks and hidden formatting

## Data Integrity Risks

- Orphaned records
- Broken relationships between records
- Auto-increment and key conflicts
- Field type mismatches
- Constraint and validation failures

## Volume and Processing Risks

- Batch processing limits
- Rate limiting
- Large attachment handling

# DATA MIGRATION CHECKLIST

## Now, How am I migrating data?

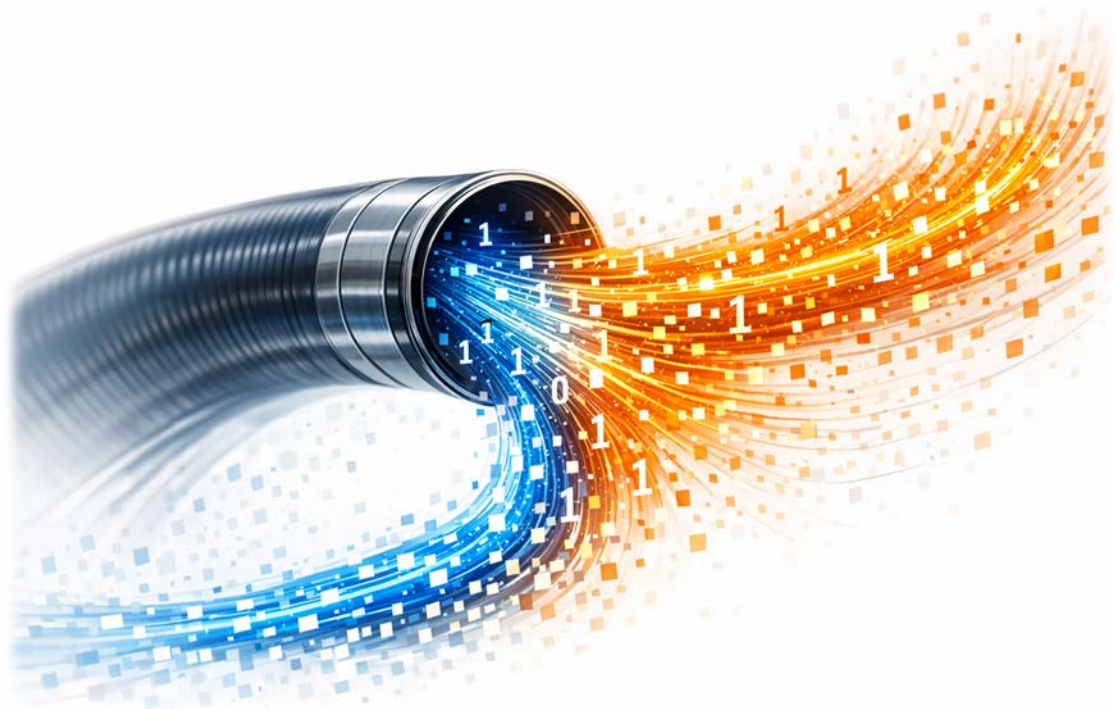
- **.csv export -> import**
  - Does the new system allow 10,000 records to be uploaded via .csv?
  - Are commas in Notes (for example) going to be an issue?
- **Direct Database migration**
  - Risky
  - Avoid this
- **APIs**
  - Sounds neat
  - Phased migration -> retrieving from multiple systems



# DATA MIGRATION

## ETL Logic: Extract, Transform, Load

How raw, messy data becomes usable in a new system.



### Extract

- Identify source systems and required data sets
- Confirm access, permissions, and export limits

### Transform

- Normalize formats, dates, and field types
- Parse and clean free-text fields using rules and logic
- Resolve duplicates and standardize values

### Load

- Import data in controlled stages
- Preserve record relationships
- Validate results after each load

# DATA MIGRATION QUESTIONS

Before migrating data, your vendor must answer these clearly.

## Process

- Is the data migrated in phases?
- How are relationships preserved?

## Validation

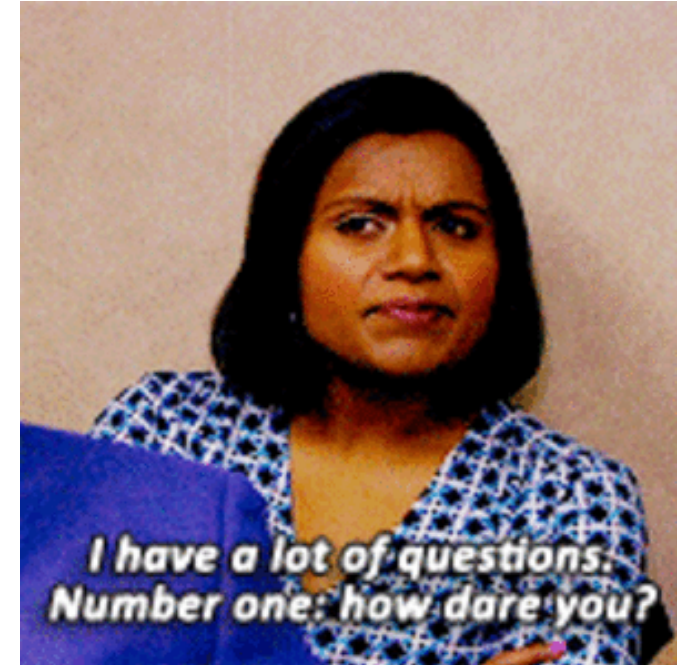
- Do we get a test environment?
- How do we verify the data is correct?

## Risk

- What happens if something goes wrong?
- Who fixes it?

## Key takeaway:

If these answers are unclear, the migration is not ready.



# Thank you!



# Brought to you by...

## What is the League of Association Technologists?

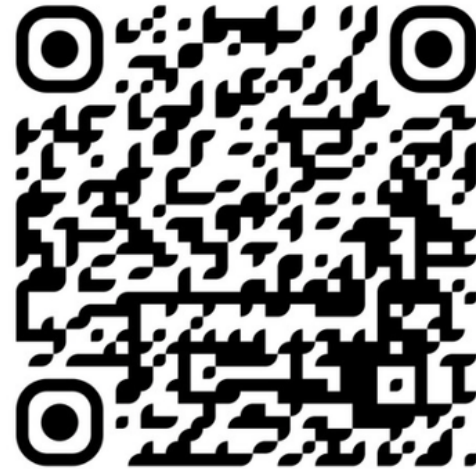
- New organization focused exclusively on association technology
- Dedicated to improving the outcomes of association technology projects
- Technology focused newsletter launching
- Check us out at <https://techleague.org>



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# Please tell us what you think...

<https://www.surveymonkey.com/r/InvestWiselyWebinarFeb2026>



## We love feedback!