

16 Reasons you need (or don't need) custom Association Management Software

Are you fighting with your current association management software (AMS)?

Are you frustrated by manual workarounds because your software can't do what you need?

Not sure if you will be able to find a vendor solution that meets your needs?

Ready to get a new AMS? Then you should first determine if you need to build your own custom AMS, or if you should try out vendor solutions.

We've identified 10 reasons why you need custom association management software... and 6 reasons why you don't. So continue on, brave reader, and please reach out to us if you need further guidance on this exciting journey. :)

Reasons you need custom association management software

Need #1

You have complex workflows

How do you know if you have complex workflows? Well, how many steps are involved in your membership application form? If it's a one-pager with demographics collection and a flat price, then it's not complex! If it's 3 pages long with checks and details throughout (maybe because you are regulated or because you want to have a very specific type of person as a member) it's starting to look complex.

A custom AMS means that your software is going to match you every step of the way. The results of this are:

- Massive time savings for members and staff
- Reduced errors by members and staff
- All your data stored in the right place

Without a custom AMS, you need to implement workarounds for your vendor AMS. These workarounds appear as things like:

- Uploading a PDF form as part of a membership application (and that PDF needs to be stored... somewhere).
- Requiring members to contact you directly for category or status changes, because your AMS can't calculate the fees or dates correctly.
- Spending weeks compiling a report that pulls data from multiple sources
- Printed out packages (that are put together by hand) for review juries like professional development, discipline, and member applications.

Need #2**You can't change your workflows**

Maybe your bylaws, rules, or regulations force you to be extremely specific about your workflows, and you can't change them. This can happen because:

- You're a regulated profession
- You serve a niche of professionals or organizations
- ... you had an extremely "Type A" founding Board ;)

When you can't change your workflows, you might not be able to find a vendor AMS that works within your requirements. Or you could skirt the rules and, ya know, hope the Board or membership doesn't notice.

Need #3**You need your data stored in a specific location**

Do you have a requirement that your data is stored within your State or Country? For example, many Canadian organizations can't store member data in the United States. Maybe you have policy restrictions about storing data in "the cloud", whatever that may mean to you. When you create a custom AMS, you can choose where your data is stored, and make sure it stays there.

Need #4**You need to meet privacy requirements**

When you use a vendor AMS, that vendor has access and control over all of your member data. You need to trust that the vendor has the correct access restrictions and logging in place in order to protect your data.

If you have a requirement to minimize who has access to data (whether it's member, financial, account, or anything else) then you may need to enforce that requirement through a custom AMS that provides the correct controls.

Need #5**You value long term strategic planning**

A custom AMS means your system can scale and grow with your organizations' changing needs. You are able to evaluate the changes, both from a member and staff perspective, and make improvements on an ongoing basis. You can easily plan these changes within your annual budget, and roll out features that fit into the long term strategic vision of your organization.

With a vendor AMS, you, uh, hope that they prioritize the features and changes that you need to hit your long term goals... but hope isn't a strategy.

Need #6**You need full control over integrations**

If you already have a suite of software tools that you have invested in (e.g. training, licenses) then it can be difficult to find a vendor AMS that has every integration you need, with every integration working the exact way you need.

With custom, you determine what integrations your AMS should have.

Need #7**Your expensive staff shouldn't spend time on tasks that can be automated**

Here's a hidden cost to vendor AMS: all the time spent manually working around the software. Doing slow, manual tasks like scanning documents and uploading them, printing off packages, and exporting data to be used somewhere else.

Your staff's time is valuable both in using their skills effectively and also in their salary cost to your organization. It's important that their time is not wasted. A custom AMS allows you to take stock of the types of tasks and processes your staff are spending time on, and build the tools that make those tasks and processes easier, automated, or no longer necessary.

Need #8**You value independence**

When you build a custom AMS, you own it. You are not locked into a vendor solution that you invest thousands of dollars into, with no tangible asset. With a custom AMS you get to choose:

- How much money you invest in it initially;
- A budget for ongoing improvements;
- Which features are built and how;
- Which other tools it integrates with; and
- The future functionality that will best support your organization.

Need #9**You want to enhance the user experience**

Most of the user experience on a vendor AMS is locked-in. But with custom it is wide open! If your members run into a problem step during a workflow? Change it. When your staff can't easily cross reference data? Automatically connect it.

With a custom AMS you can be responsive to user feedback and make improvements as required. This keeps your members and staff happy, which keeps your operations running smoothly.

Need #10**You want to be a partner, not a customer**

When you build a custom AMS, you are working closely with a team of experts that are invested in your success. You have a person that you can pick up the phone or send a quick email to, and that person knows your name, knows your organization, and will respond when you need them. No automated "Thank you for your inquiry" emails, or rotating "customer success representatives" responding within 3 business days.

Instead of being one of hundreds or thousands of customers that signed up to a platform, you are a partner with your software developer. Together you:

- Meet your organization's short term needs;
- Predict and adapt to the changing business landscape; and
- Imagine a long term vision for your organization that is supported by your software.

Reasons you don't need custom association management software

Don't Need #1

Your workflows are simple and/or average for the industry

The majority of member-based organizations are going to have the same workflows: apply to join, annual dues, access to some sort of member-only content, etc. If your organization is “extremely typical” of these requirements, a vendor AMS is going to be a great fit.

An easy way to test if you have a simple workflow is if you can accurately describe your key processes (membership applications, renewals, etc.) in under a minute each.

Don't Need #2

You can adapt your business processes to the software

If you can be flexible with your business processes and change them to work the way a vendor AMS has designed them, then a vendor AMS is a good fit. They will have a suite of built-in features and processes that you can pick from that you can then adapt your processes to.

This is also great if you don't have any processes. Your newly selected software will force you to start somewhere!

Don't Need #3

Doing things manually is “good enough”

For organizations with only a few staff and a small membership to support, sometimes it makes sense to continue to do some things manually. If you have existing manual processes that are working well enough, or you can find a vendor AMS that does ‘most’ of what you need it to, then you are on the right track. Over-optimizing when it isn't needed is going to be painful and expensive, and in the end you will likely go back to how you were doing it before!

Don't Need #4**You use Excel spreadsheets for almost all work**

There's nothing wrong with powering an organization through Microsoft Excel. Most organizations should start here anyways, when you're small and your requirements are simple. If you are already running many processes on Excel, and you haven't hit the tipping point where Excel doesn't scale for your organization anymore, then there's no need to upgrade.

How do you know when you need to replace Excel? Well, it's a little like falling in love: when you know, you know. :)

Don't Need #5**You need a solution right away**

Rome wasn't built in a day, and neither will your software. ;)

Custom developed software takes time to plan and implement. If you are in a situation where you need a solution right away, you are better off trying out a vendor AMS solution where you can sign up and start using it immediately.

Don't Need #6**You have a limited budget for the upfront investment**

Custom developed software will have a larger upfront cost than a vendor solution, both in staff time to plan and implement and actual development costs. If your organization is working with a limited software budget, a vendor AMS will have lower upfront costs.

Frequently Asked Questions

I think I need custom association management software. What's next?

Let's have a chat! We're happy to share our experience with you, and get your organization moving towards some awesome software. If the chat confirms that we are a good fit for one another, we will send you a proposal for [Discover and Plan](#), the first step in our 3 step process for software development.

Call Dana at +1 780-619-8868, or email hello@codeandeffect.com, or visit codeandeffect.com.

I don't need a custom AMS. Can you help me pick a vendor AMS?

Yes! We offer a consulting service where we work with your team to identify your requirements, research potential vendors that can meet your needs, and then come back with a summary report and recommendation. Turnaround time is 3 weeks and the cost starts at \$3,000.

Who are you?

Code and Effect is a software consultancy that works with professional, regulatory, and member-based associations.

We develop cloud-based software that matches your rules, bylaws, and regulatory requirements. Instead of an off-the-shelf Association Management System (AMS) that you fight and work around, we guide you through our discovery process, then build and support a system that meets your exact specifications.

Some of the solutions we provide include:

- **Member Databases** - Custom member relationship management databases to track: demographics, activity, history, applications, discipline, continuing education, and more.
- **Member Portals** - Empower members to sign in and manage their information, submit payments, request changes to their status, and download secure files.
- **Applications to Join** - Streamline complex applicant workflows, including: submissions, references, payments, committee reviews, revisions, and approvals.
- **Dues, Renewals, and Fees** - Calculate and charge the correct dues or fees, including situations with complex statuses and changes. Have full financial reporting.
- **Professional Development** - Web-based tools to track, submit, roll forward, and audit all required annual continuing education.
- **Discipline** - Receive, adjudicated, and communicate member discipline to the public.
- **Association Websites** - Communicate with members and the public with a professional, easy-to-update website.