



Technology Acquisition Questions

1. ***Briefly, please describe how your organization selected your last Association Management Software tool. Do you believe this was effective?***
2. ***For the most part, how does your organization view technology?***
3. ***Briefly, please describe the high level goals of the staff for purchasing new technology. The business need rather than features.***
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4. ***Does the stated goals of the staff, mirror the expectations for technology goals of the board of directors?***
5. ***Has your board of directors mandated your organization to solve any particular specific issues?***
6. ***Of the current software technologies in place today, which one (s) have to remain in place and cannot be changed or replaced?***
7. ***How did your organization arrive at the need for this project?***

8. If you do not solve your operational challenges (if any) with technology, what will the impact be to your organization? Please describe.

9. What does technology success mean (in terms of finding the proper software to address your operational challenges)? What are the metric outcomes you hope to achieve with any solution selected?

10. Please describe your internal group discussions thus far as it relates to solving these problems? Please describe.

11. Ideally, what would you like to spend on this project the 1st year? 2nd year? 3rd year?

12. How did you arrive at this figure?

13. Realistically, when would you like to have the system up and running (fully operational)? Decide on a timeline for evaluating, implementing, and launching your new system.

- What major benchmarks are on your association's calendar that you need to be aware of.
- Consider upcoming events, membership drives, and renewal periods.
- Set date ranges for discovery, demonstrations, questions, decision making, and going live.
- Determine exactly how much time the staff can dedicate to implementing the solution.

14. Internally, does your organization have any technology biases?
15. What are your thoughts on hosting technology internally or externally on an outside sever?
16. On a scale of 1-10 (1 being highest and 10 being highest degree of importance) do you place the importance of customer support in your selection of a vendor/partner?
Comment: This is one of the most underrated issues regarding AMS selection, and probably the most important. Unlike most software that you purchase over the counter (like MS Office products, games, etc.) AMS selection is not a one-time shot where you buy the software and then move on. The relationship with your software vendor is key to the continued success of your AMS. Thus, you must have a “good feeling” about the vendor and the people who you will be working with. This is purely intangible but extremely important. There is a classic management aphorism that no strategy ever failed on design; it’s the implementation that counts. The same is very true for selecting a new association management system. No database ever failed on selection; if it fails, it usually fails because of poor implementation.
17. What in house technology resources and competencies do you have presently on staff to manage server/desktops?
18. Do you have a preference on hosting technology in house or externally off site?
19. Do you have a preference when you acquire technology (owning a perpetual license) or renting (software as a service)?
20. Please list the technology systems (if any) you plan to consolidate or integrate for this project? Priority for consolidating systems?
21. Please list which technology solutions you have explored thus far in the selection process?

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22. **Please describe what you have liked about the technology solutions you have explored thus far in the selection process?**
23. **Please describe what you have disliked about the technology solutions you have explored thus far in the selection process? List.**
24. **How do you prefer training to be handled?**
- a. Remotely online
 - b. Web videos
 - c. Personal onsite
25. **Are you requiring that your existing data (contacts, organizations, activities, financial history) be imported into the new system? Yes or No.**
26. **Please describe your feelings about the user interface/use ability of your current system? How does the software look and feel to the average user? Is it attractive and uncluttered? Or is it ugly and cumbersome?**
27. **When was your last web site redesign? Are you wanting to revamp the look and feel alongside the transactional elements of your web site as well?**

Yes or No.