Learn the average timeline for implementation

Understand a general overview of each phase

Discover the required time commitment at every step

IMPLEMENTING YOUR AMS

WHAT TO EXPECT ALONG THE WAY

The first step to maintaining a successful association is serving your members in the best way possible. An Association Management System (AMS) helps you do this by laying the groundwork for managing all of your organizational needs in a single place, while alleviating the workload of manual data-entry, multiple databases, and much more. And while a good AMS can answer to the unique needs and problems your association is facing, the journey to attaining this type of software isn't always so easy. Once your team goes through its search process and selects the best AMS for your association, the demanding—and rewarding—task of implementation can begin.
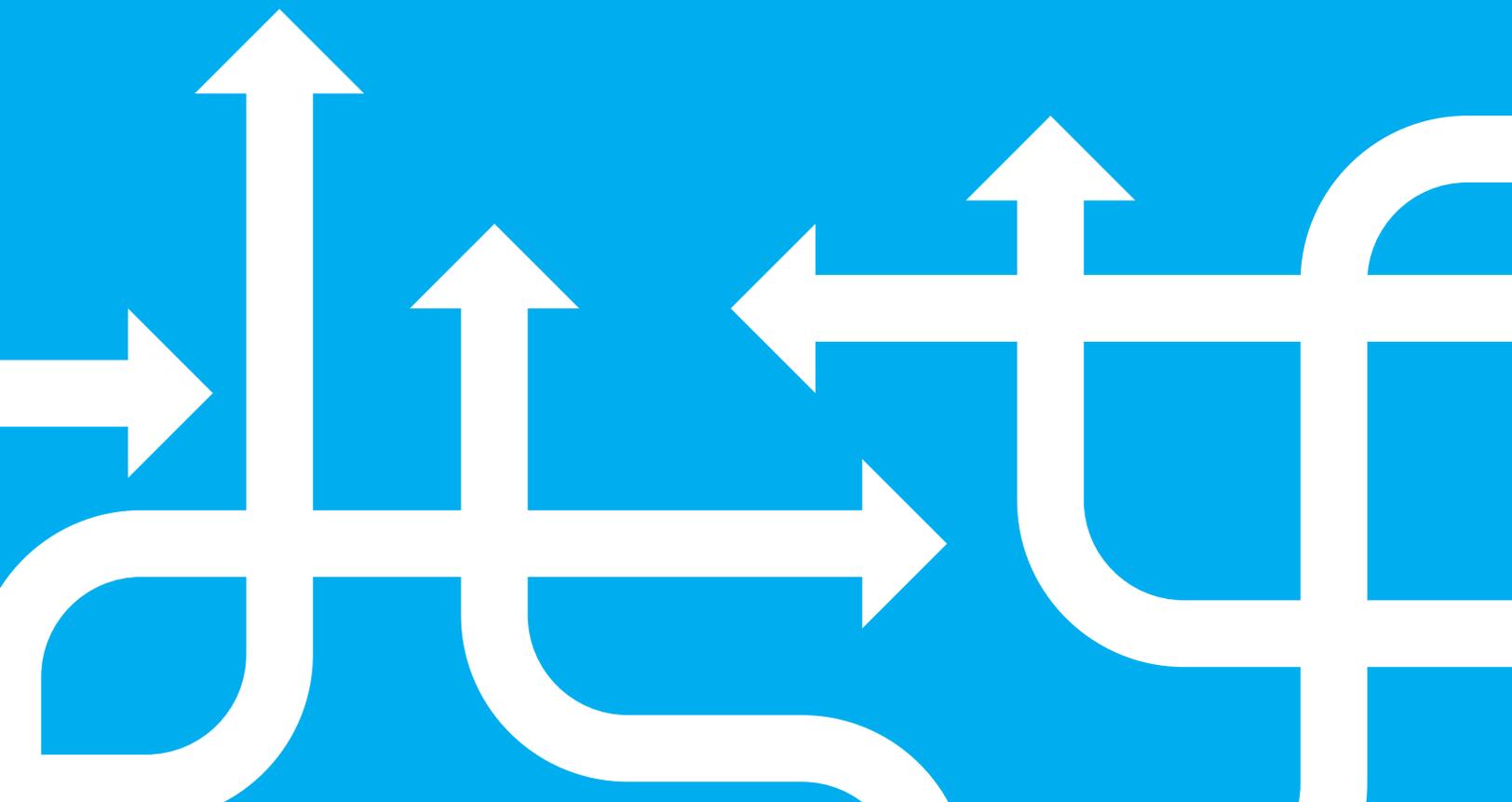
▶ IMPLEMENTATION

Before you begin implementing your software, it is important to understand what is involved in the implementation process. Implementation is a hard project: there are long hours, conflicting ideas, and various obstacles along the way. Sometimes you may even forget why you decided to implement the AMS in the first place. Knowing what lies ahead, however, puts you on the best path toward an improved experience and better results. With realistic expectations, you can more easily overcome obstacles and resolve issues.

> "You should involve all aspects of your organization [in this process] so that every area has a voice at the table. You need individuals who can contribute the amount of time and energy needed that will be good cheerleaders for the project. It was important that this critical project not be seen as an IT or technology project, but rather an organizational project that everyone can support."
> — Janey Brummett, CHA

> "When deciding to select a new AMS, we believe it is critical to create an actively engaged, cross-functional team to go through the vendor review and selection process."
> — Janey Brummett, CHA

Let's get started!

▶ YOUR TEAM

Implementation can be a complex and lengthy project, and involvement will be required from your team during each phase. To enjoy a successful implementation, these team members from your group will need to be fully engaged:

Executive Sponsor: Offers support, direction, and guidance to team members at all levels of the organization.

Project Manager (PM): Monitors the overall progress of the project and ensures key milestones are completed.

Subject Matter Expert (SME): Provides information regarding your association's business, authors key documentation, and provides data and functionality validation.

Technical Team: Provides infrastructure and administrative support, leads the data-conversion process, and provides test support.

❯ COMMITMENT

Implementation typically has five phases:

- Discovery and Design (also known as Solution Design)
- Build
- Validation
- Deployment
- Post-Production

Most phases require a certain level of commitment from your team (and certain high-level tasks might require more or less commitment). Here's a quick breakdown depicting the amount of time you can expect to dedicate during each phase of the project.

DESIGN	BUILD	VALIDATE	DEPLOY	POST-PRODUCTION
2-3 Months	4 Months	3 Months	2 Months	2 Months

Greater commitment is often needed during the initial and final phases. Throughout the project, you'll experience the five levels of commitment outlined below.

DISCOVERY AND DESIGN: Medium to high commitment
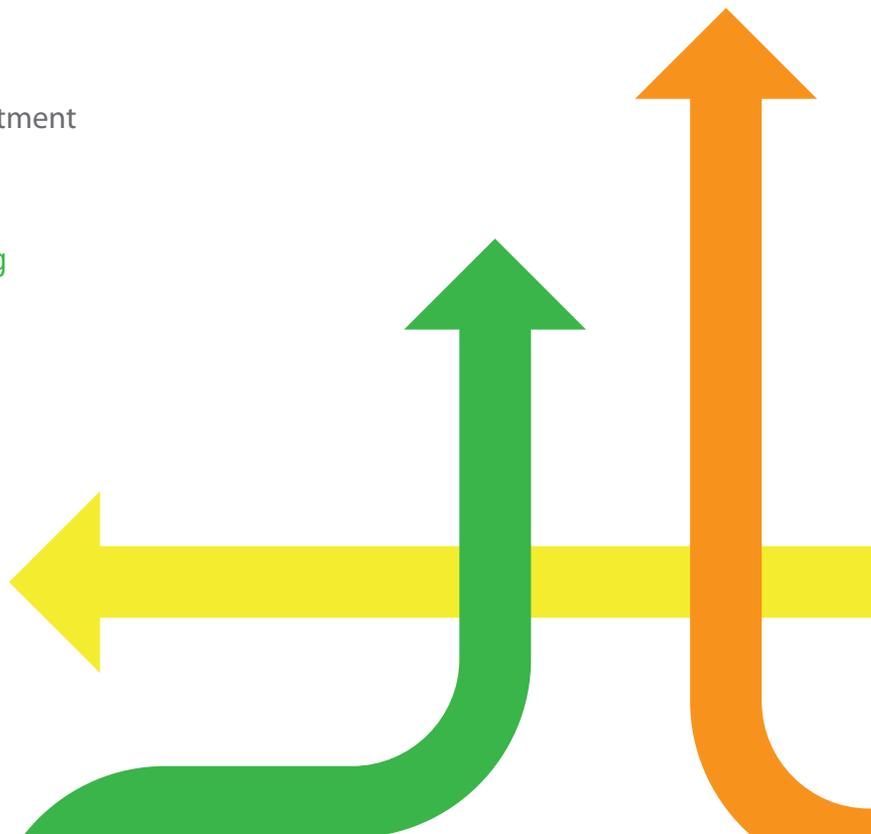
BUILD: Low commitment

VALIDATION: Medium commitment

DEPLOYMENT: Medium to high commitment

POST-PRODUCTION: Low to medium commitment

▶ DATA CONVERSION

Typically, the most time-consuming task in an implementation project is the process of data conversion–it is also crucial to implementation success. To cut down on expenses, many associations decide to tackle data conversion in-house. This is a very risky move. A successful implementation relies on proper data migration, which is something many associations are not trained to handle on their own. It is strongly recommended that your team works with their AMS vendor to ensure proper data conversion and a successful implementation.

Data conversion occurs multiple times throughout implementation and puts data into a different structural form in order to meet the requirements of the new system. The data you'll be converting often fall into three categories:

- **Types and Codes:** Includes values in drop-downs and various codes in the system.

- **Master Data:** Data such as People, Companies, and Employees that exists only once in the system; transactions are used repeatedly.

- **Transactional Data:** Data describing business activity, such as Orders and Subscriptions.

Duplicate records or inconsistent data can cause issues during the conversion process, which is why data cleansing is a necessary step during data conversion. Data cleansing involves the IT staff and SMEs working together to review and "clean" data, ensuring a smooth conversion process.

> "One of the biggest issues that can arise is with proper data conversion and understanding that this takes time. If much of the data harvested from the old system is bad data, data cleanup on the client-end may be very time consuming and costly especially if they don't have the right tools." — Joanne Rang, ITAG

◗ TIMELINE

Every association is different, which means the duration of an implementation project largely depends on each individual client. Your specific schedule will be largely determined by the amount of data you'll be converting and the functional requirements produced in the initial phase. You'll work with your AMS vendor in the Discovery and Design phase to create an estimated timeline; implementation projects average about 11-12 months, but one can last over two years if the project is large. Keep in mind that your estimated timeline is simply that: an estimation. Problems might arise or changes could be made during implementation, causing your schedule to be affected. While you want to stay ahead of the game and try to prevent these situations from occurring, it's also important to know that they can happen and to stay flexible during implementation.

"As part of the membership department, I knew I would be putting in a substantial amount of time with this project. However, with discovery, training, testing, and data conversion, at some point, the entire staff had to be involved—and they didn't realize how much work it would be."
— Nicole Yates, NSBE

◗ RISK MANAGEMENT

Although you'll be creating an implementation plan during the first phase, it is important to keep in mind that your timeline might have to change due to issues that arise along the way. To keep these situations to a minimum, your team will work together to brainstorm problems that could occur throughout the entire implementation process. This practice will continue during later phases as well, helping you stay one step ahead of the game.

❯ COMMUNICATION

Good communication is essential to a successful implementation project. Everyone involved in this project should be communicating with one another and understand what the goals are for this project, what decisions are being made (or need to be made), and which tasks need to be completed. Throughout each phase, two recurring meetings will take place:

• **Project meetings:** These meetings usually occur weekly and involve the PMs and SMEs. During these meetings, you'll discuss the status of the project, what has been accomplished, and what is yet to come. This is a good way for your team to check in with one another and ensure everything is running smoothly.

• **Executive oversight meetings:** The executive sponsors in both your association and the AMS team will meet each quarter to discuss the project's progress and what issues need to be dealt with. Once again, these meetings are meant to ensure any problems that are occurring are solved, and that the overall progress of this process is running as close to plan as possible.

"It is critical that teams maintain a log of their major business decisions. Throughout the project, you are going to have to make key decisions on how things might need to change to align with your goals. Often times, people forget or go back and question why certain decisions were made, but if you maintain a log of these efforts, everyone will be in clear communication and know why certain results were produced."
— Joanne Rang, ITAG

"Having at least one individual from each area of the organization kept all areas informed and represented during these various stages of the process. This also made the implementation and training much easier as there was already a power user or semi-power user in each area that understood how the new application worked." - Janey Brummett, CHA

Your team can also communicate through written project updates and collaboration tools like Basecamp, which enables you to work with one another throughout the implementation process by posting questions, assigning tasks, and sharing deliverables. Everyone involved in implementation should be kept in the loop at all times. With everyone communicating, you're less likely to run into big problems later on and more likely to build an AMS that best meets your needs.
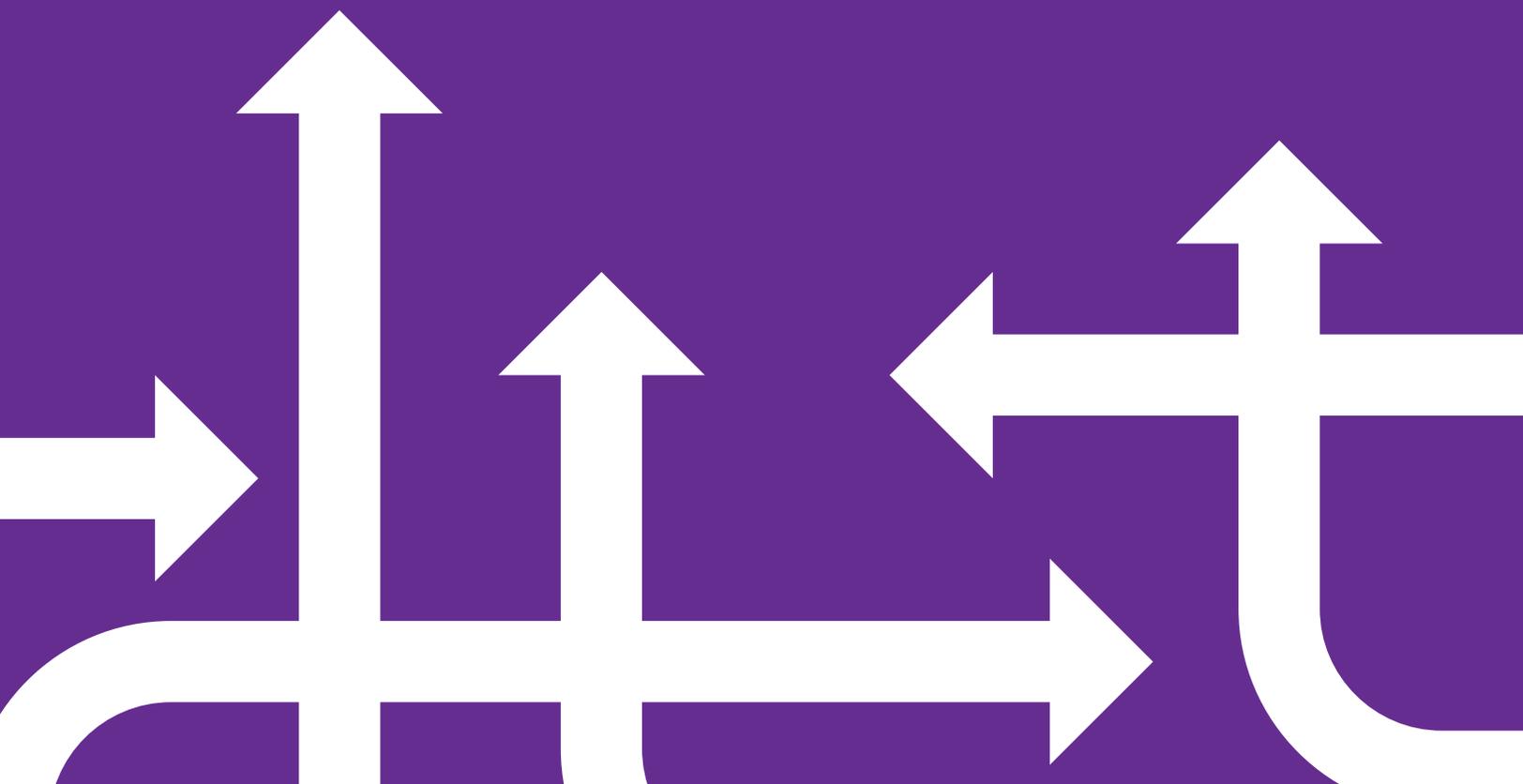
▶ WHAT TO EXPECT

Successful implementation projects require time, patience, and flexibility. Rarely does the initial plan that associations create turn into a reality, as changes to the plan often have to occur. Going into this process with realistic expectations is essential and will help you tackle each phase of the project in a more productive manner.

Although implementing an AMS requires a lot of work and time from your team, the end result is worth the effort. With a functional AMS in place, you can manage your association more efficiently and effectively. Now we'll walk you through the implementation process, phase by phase, to help you better understand the high-level tasks involved and what to expect along the way.

"When it comes to managing expectations of the implementation process, you should start out with a solid charter to define the guiding principles and goals that will steer the process. Frequently visit the charter to remind your team of those goals to maintain clear expectations." — Joanne Rang, ITAG

"Managing expectations is imperative. The overall process can be long and tedious, so the first step is to ensure everyone is fully aware of what is involved and when their time will be needed." — Kathleen McQuilkin, DelCor

❱ DISCOVERY AND DESIGN

| DESIGN 2-3 Months | BUILD 4 Months | VALIDATE 3 Months | DEPLOY 2 Months | POST-PRODUCTION 2 Months |

"When it comes to building custom configurations, it is important to thoroughly communicate with your AMS vendor about what you want—there is no room for vagueness. Vendors should also make sure that functional requirements are well defined to avoid any miscommunication with the client. Otherwise, the process will be challenging in the long-run." — Joanne Rang, ITAG

Before you can begin building your AMS, it is essential that you are able to identify the functional requirements needed to run your team. If these requirements are not known prior to implementation, then your association will begin at the Discovery and Design phase. This phase lasts about three months on average, and your team will be highly engaged in identifying the needs of your organization during dedicated meetings as well as in reviewing solution documentation.

Here's a quick breakdown of the high-level tasks to be completed in Discovery and Design:

- Conduct discovery meetings with the team to create a Functional Requirements Document (FRD) outlining your business requirements for this project.

- Creation of a Solution Design Document by the vendor based on the approved FRD that describes how to leverage the AMS software to meet your requirements.

- Plan for the data-conversion process.

- Identify possible risks that could slow down the project.

- Work with your AMS vendor to create an implementation plan that will help determine the key deliverables and time commitment from both teams.

"It is important to clearly articulate the organization's needs and ask many questions to ensure the vendor has a comprehensive understanding of the requirements in the initial phase." — Kathleen McQuilkin, DelCor
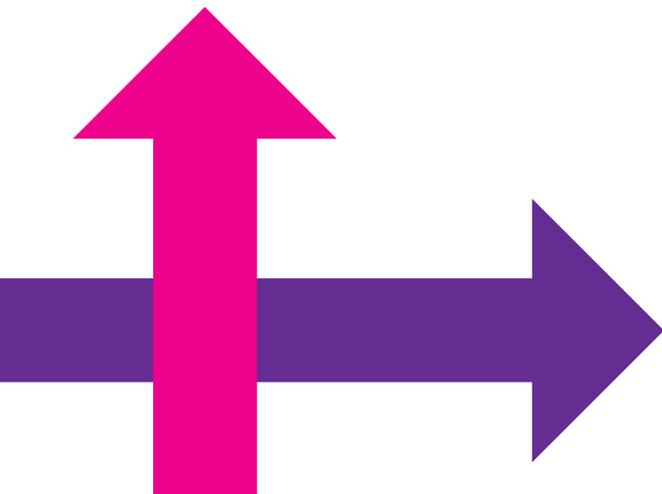
◗ SOLUTION DESIGN

DESIGN	BUILD	VALIDATE	DEPLOY	POST-PRODUCTION
2-3 Months	4 Months	3 Months	2 Months	2 Months

If it is unnecessary for your association to begin at the Discovery phase – because you've already determined the functional requirements needed for this project – then you can instead begin at the Solution Design phase. The Solution Design phase lasts about two months on average and requires a medium level of commitment from your team. It involves gathering information about your current business processes, developing solution design documentation, participating in data-conversion planning, and determining technical needs and build specifications.

Solution Design is an important phase of the project, as this is where you will define how you want your AMS to function to meet your process needs. In this phase, you will deliberate with SMEs, attend meetings, complete the SOW (Scope of Work) to clearly define the scope, and provide timely feedback regarding all the documents produced. Your feedback on the solution design document will help the developing team better meet your requirements so they can build an AMS that meets your needs.

During the Solution Design phase, you will also be working on an implementation plan. The AMS vendor will work with your team to determine how to best proceed with the project, preparing you to begin the build phase of implementation.

◗ BUILD

| DESIGN 2-3 Months | BUILD 4 Months | VALIDATE 3 Months | DEPLOY 2 Months | POST-PRODUCTION 2 Months |

Build is typically the largest phase of the project, averaging about four months, and it is the phase during which the developing and quality assurance team will build, test, and demonstrate system configurations for your team. The overall goal for the Build phase is to produce high-quality deliverables that match the exact specifications laid out in the Design phase. While you will not be building the AMS, it's essential for your SMEs and technical team to be engaged in this phase as well, reviewing developed application functionality and soliciting feedback.

"As with any project, a huge part of being successful is attributed to the communication or lack thereof. We sent our various updates to everyone in the organization throughout all stages of the project to keep staff informed as much as possible." — Janey Brummett, CHA

CHANGES

There are various changes that could occur during this phase of implementation, including those related to scheduling, budgeting, and scope. For the implementation process to go as smoothly as possible, it is essential that all changes are considered carefully. You want to be sure that the changes you make are beneficial to the project and that they are within the project scope. Be aware that changes that impact the scope of the project will likely add extra time and cost. You will also need to determine what factors are most important for your project and organization. For example, you may put more priority toward hitting your scheduled go-live date and therefore will limit any increase in scope. Conversely, you may put more weight toward considering all requirements for the initial release and therefore accommodate by increasing the timeline of the project.

GOOD COMMUNICATION

Continuing good communication is crucial in the Build stage. Discuss any changes that are made during implementation with everyone who is involved in this project and how those changes affect the overall process. What may seem like a small change to one department could have a major impact on another, so carefully consider each add-on and how it affects everyone involved.

◗ VALIDATION

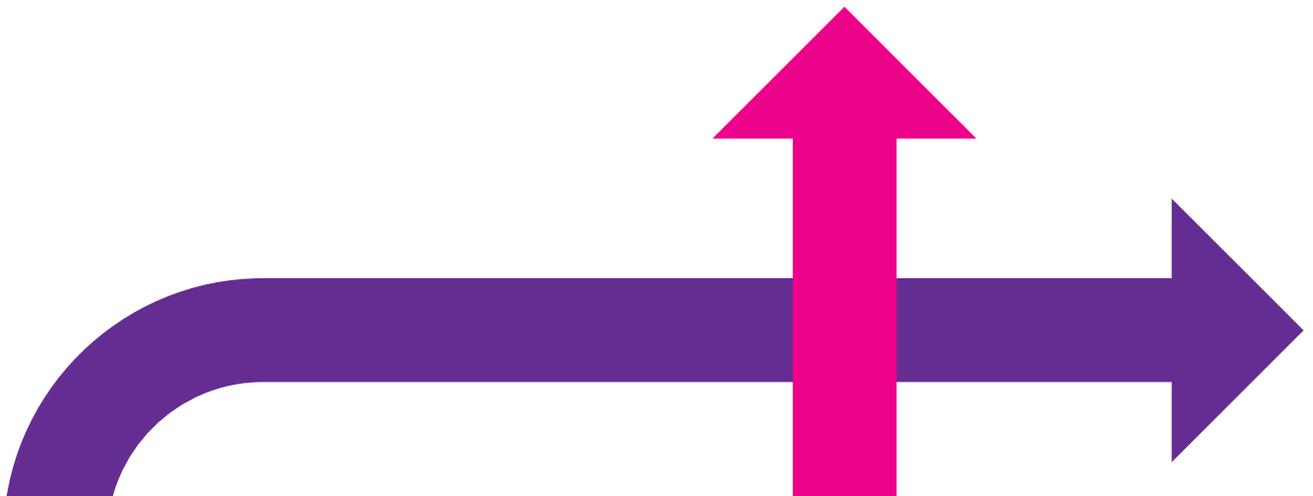| DESIGN	BUILD	VALIDATE	DEPLOY	POST-PRODUCTION
2-3 Months	4 Months	3 Months	2 Months	2 Months

You will be deeply involved in the Validation phase, as it lasts three months on average. The Validation phase is the testing portion of the project and takes place after either a portion of or your entire system has been delivered. This phase is also commonly referred to as User Acceptance Testing or UAT. The objective of this phase is to ensure that the system is accurate and meets the requirements documented in the beginning of implementation. Any problems that occur during testing will be fixed before the next phase begins. Once you've approved the system, the project will move on to the Deployment phase of implementation in preparation for go-live.

"Completing comprehensive testing helps solidify what was taught during training as staff work their way through the functionality. During the testing phase, it is important to document all issues/bugs identified and follow the solution through to resolution."
— Kathleen McQuilkin, DelCor

Three types of testing will take place:

- **Performance testing:** The portions of the AMS that are determined to have heavy user load will be tested to ensure it is performing as it should.

- **System Integration Testing:** Once the entire solution is built, the system is tested to ensure that components are working together properly.

- **Regression:** Verify that the existing system and any remaining functionality that will be integrated with the AMS is working as expected.

During the Validation phase, your team will also receive end-user and developer training prior to go-live, ensuring a smooth handoff. Developer documentation and documentation pertaining to revised standard operating procedures will be given to your team for reference.

◗ DEPLOYMENT

| DESIGN	BUILD	VALIDATE	DEPLOY	POST-PRODUCTION
2-3 Months	4 Months	3 Months	2 Months	2 Months

Once the system has been approved in the Validation phase, you will move on from the development and testing stages and enter the Deployment phase. This phase typically lasts two to three months and involves launching the system into production. To ensure a smooth transition, you'll receive help from training staff, creating a successful go-live plan, performing tests, and setting up a mock go-live before the system actually goes into production.

After the mock go-live has been completed, you will begin the go-live process, which includes:

• Transferring the system from the testing/staging environments to the production environment.

• Performing the last data conversion from the legacy system.

• Performing data validation to ensure the data conversion was successful without contaminating the data that was transferred.

"To ensure a smooth final conversion just before go-live, it is crucial to complete several data conversion iterations."
— Kathleen McQuilkin, DelCor
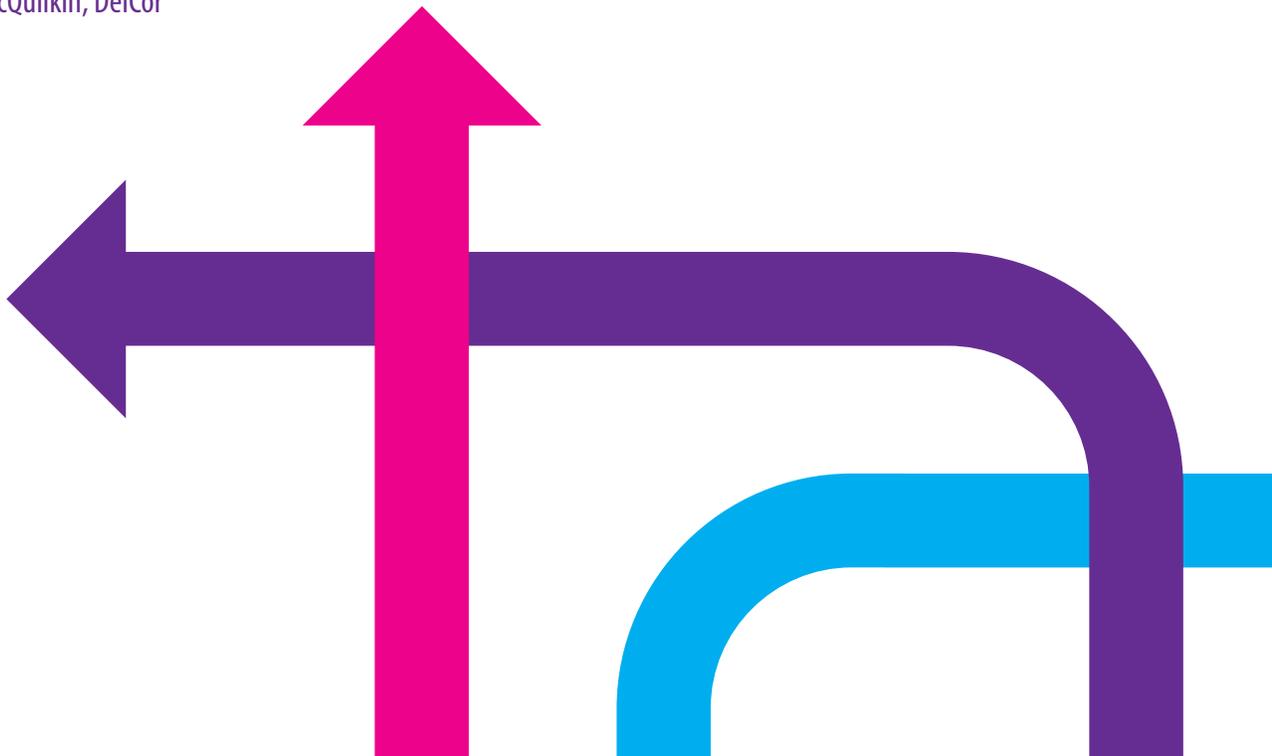
▶ POST-PRODUCTION SUPPORT

| DESIGN	BUILD	VALIDATE	DEPLOY	POST-PRODUCTION
2-3 Months	4 Months	3 Months	2 Months	2 Months

Even after the Deployment phase is over, your team can seek help when needed. The final stage involves hands-on support so you can quickly address any issues that may arise after the system is live. Your technical team will work with the AMS vendor's support team for system trouble-shooting and end-user support to ensure the system is running smoothly for everyone.

The time commitment required in the Post-Production phase depends on the amount of testing done prior to go-live. More comprehensive testing most likely means that fewer issues will arise and therefore a smaller time commitment is required. On average, you will need about two to six months to settle into the new system and complete this last phase.

Once you've reached the final stage, take some time to celebrate the completion of a long project with everyone involved. Implementation isn't easy, and your team has worked hard for months to ensure the process goes smoothly. Plus, now that the implementation process is over, you can finally start managing your association from an intuitive, efficient platform and work in a more productive manner.

"It is important that staff understand that the project is part of their jobs now. From system setup to configuration to training, they will need to figure out how this fits in their daily routine. Once the system is live, these individuals will need to know how to work and maintain the system regularly." — Joanne Rang, ITAG
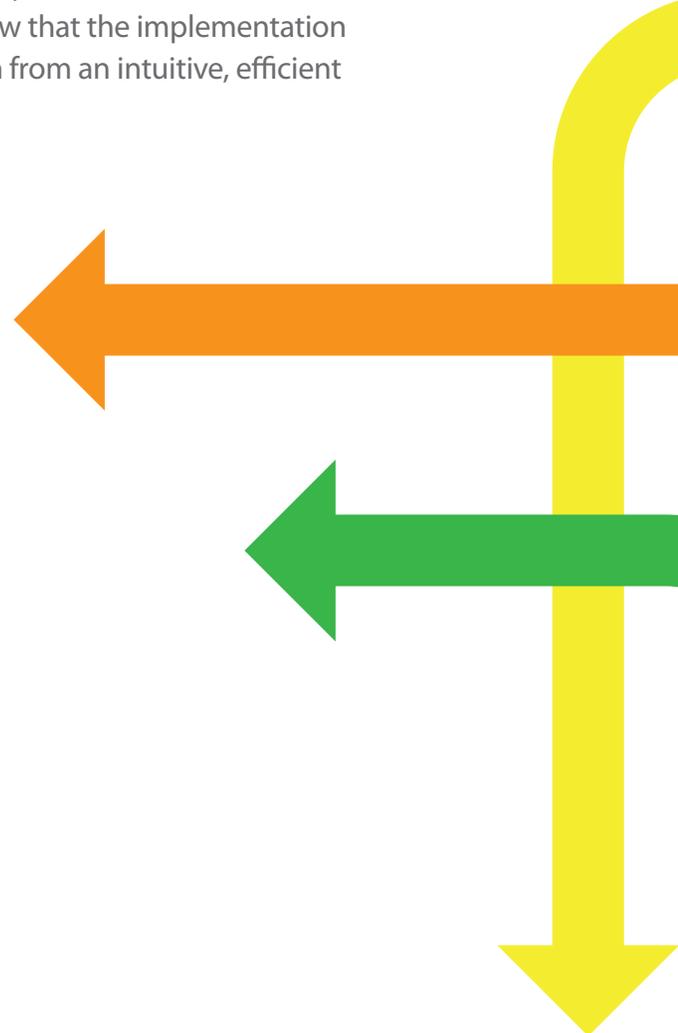
▶ WHY APTIFY?

Not all AMS systems are created equal, and it's important that you choose the right solution for your association. For more than two decades, Aptify has had the honor of serving the needs of more than 150 of the largest global not-for-profit organizations. We become partners with our clients, learning their specific needs and providing long-term solutions for them to provide a perfect member experience.

Here are just a few benefits of choosing Aptify:

The flexibility of the Aptify product allows you to adopt new technology while keeping the features that serve your association best. You'll have the freedom to grow and change as your needs change. Plus, you'll have the security of knowing the system can easily adapt to the needs of your members and staff.

The Aptify team has extensive experience in the association industry, allowing you to leverage the work of those who have been there and done that. Our business analysts work with you to address change management, helping to ease the stress of implementation. Instead of merely installing your system, the implementation team sets the groundwork for a successful and lasting partnership.

"Commitment from all levels of the organization is crucial and the client absolutely needs to take a heavy role in the implementation process. When it comes to making major business decisions, senior level commitment is especially important because if they don't back the project, the staff certainly won't feel a need to use the new software. These decisions can lead to a number of outcomes including cost overruns." — Joanne Rang, ITAG

Aptify users make up a thriving community through a mentoring team, the Aptify Ambassador Program, an extensive suite of training offerings, regional meetings, and an annual conference. The user community supports new clients throughout the implementation process and beyond, forming ongoing professional and personal relationships along the way.

For more information or to find out how you can work with our implementation team, visit www.aptify.com.

> "Because we were so entrenched in our business processes, it was initially difficult for us to imagine doing our daily work any differently than we had been. We were able to discover the difference between configurations that we needed in the system and configurations that we wanted because we were so used to them. Leveraging the stock product where you can will save both time and money." — Nicole Yates, NSBE

THANKS FOR THE CONTRIBUTIONS

Janey Brummett - Senior Director of Information Technology, Catholic Health Association of the United States

Kathleen McQuilkin – Managing Consultant, Technology Management, DelCor Technology Solutions

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Nicole Yates – Director of Membership and Registration, National Society of Black Engineers