

# ABC ORGANIZATION – ASSOCIATION MANAGEMENT SYSTEM SOLUTION DISCOVERY REPORT

Report requested by and presented to  
**ABC Organization**  
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**TABLE OF CONTENTS**

1.0	Purpose of This Document.....	1
2.0	Possible AMS Solution Candidates.....	2
3.0	Eliminate prospects which do not meet minimum criteria .....	3
4.0	Filter candidate list based on additional impacting factors.....	4
5.0	Review and identify key pros and cons.....	5
5.1	Solution Candidate #1.....	5
5.2	Solution Candidate #4.....	6
5.3	Solution Candidate #7.....	8
5.4	Custom Developed Application.....	9
6.0	Summary .....	10
7.0	Recommendations .....	11



## 1.0 PURPOSE OF THIS DOCUMENT

The goal of this report is to present qualified Association Management Software solutions to replace the client's current software. To accomplish this I have proceeded along the following trajectory:

1. Compile open list of possible AMS solution candidates.
2. Eliminate prospects which do not meet minimum criteria.
3. Further filter candidate list based on additional impacting factors.
4. Identify remaining qualified candidates.
5. Review each solution and identify key pros and cons.
6. Summarize findings.
7. Make recommendations.

## 2.0 POSSIBLE AMS SOLUTION CANDIDATES

The initial list of possible candidates was provided by the client as ones they had previously identified. After some further investigation, I identified an additional 4 candidates and expanded the list to include the possibility of a custom developed application.

### **Suggested by Client**

1. Solution Candidate #1
2. Solution Candidate #2
3. Solution Candidate #3
4. Solution Candidate #4
5. Solution Candidate #5
6. Solution Candidate #6
7. Solution Candidate #7
8. Solution Candidate #8
9. Solution Candidate #9
10. Solution Candidate #10
11. Solution Candidate #11
12. Solution Candidate #12
13. Solution Candidate #13

### **Independently Identified**

1. Solution Candidate #14
2. Solution Candidate #15
3. Solution Candidate #16
4. Solution Candidate #17
5. Custom Developed Application

### 3.0 ELIMINATE PROSPECTS WHICH DO NOT MEET MINIMUM CRITERIA

In order to focus only on valid candidates, my initial filtering process relied on identifying clear examples of shortfalls or conflicts within the product that would prove to be insufficient to meet the client's primary needs. Examples of such shortfalls or conflicts would be "not geared towards association management" or "not enough/incompatible features". The following candidates passed the initial filtering process:

1. Solution Candidate #1
2. Solution Candidate #4
3. Solution Candidate #7
4. Solution Candidate #10
5. Solution Candidate #11
6. Solution Candidate #12
7. Solution Candidate #14
8. Solution Candidate #15
9. Custom Developed Application

#### 4.0 FILTER CANDIDATE LIST BASED ON ADDITIONAL IMPACTING FACTORS

Having identified the candidates that appeared capable of providing most - if not all - of the requirements, I then reviewed them in greater detail. My goal in this phase was to remove any candidates which may be unsuitable due to additional impacting factors. For example, in the case of Solution Candidate #10 and Solution Candidate #15 both products/companies had been purchased by CDC Software since their introduction to the market. CDC Software is a hybrid enterprise software provider founded in 2002 which appears to have been acquiring other companies since their inception. They do not currently promote their own AMS package but the fact that they have purchased more than one company offering AMS solutions leaves the future of each individual product in question. These products could be merged or phased out leaving the client in the unwelcome position of having to migrate once again.

The following candidates passed the advanced filtering process:

1. Solution Candidate #1
2. Solution Candidate #4
3. Solution Candidate #7
4. Custom Developed Application

## 5.0 REVIEW AND IDENTIFY KEY PROS AND CONS

Having identified the most suitable candidates I then reviewed each of them in greater detail.

### 5.1 SOLUTION CANDIDATE #1

Solution Candidate #1 was established in 1996 and is the supplier of the client's current solution. The original product was purchased by the client through a product reseller who has since been purchased by Solution Candidate #1. Due to the fact that they already have a relationship with the provider there may be some benefit during the transition process. However, due to the fact that the client's software is currently at version 10.6 while the latest version is at 15.1.3, my research shows that a straightforward, direct upgrade will not be possible.

Solution Candidate #1 offers a customization module. This module is available for developers and non-developers but it is my opinion that unless a staff member is trained and qualified in its use it would not be advisable for a non-developer to do so. In order for customization to take place, Solution Candidate #1 must be launched in the proper mode for system alteration, all users must exit the system and data must be backed up. This would most likely require bringing in an outside consultant to assist or complete the modifications on the client's behalf.

Solution Candidate #1's support team agreed that a staff member may be eligible to maintain the Solution Candidate #1 system but that training would be required in order to meet with their best practices policies to qualify for support. This would involve committing at least one staff member to this task and presenting the possibility that a disruption could occur if that staff member was no longer available to the organization.

#### COUNTRY OF ORIGIN

Canada

#### COST / LICENSE STRUCTURE

- Waiting for further information for total cost quote
- "Named" (Full) users – access to all modules
- "Casual" users – access specific/limited modules
- "Public" (Member) users – web only access to specific information
- Solution Candidate #1 existing 4 concurrent user licences would be converted to 5 Solution Candidate #1 Named user licences
- If less than 5 total Named users are required, each unneeded Named user license can be converted into 2 Casual user licences

- Public user licences are sold in batches (18000, 24000, etc.)
- Additional new modules will need to be purchased with individual licences
- Annual software maintenance fees based on user licences at approximately 20 – 22% of licence fees with an annual increase of 3%

#### ESTIMATED INSTALLATION TIMELINE

Waiting for further information from provider.

#### PROS

- Already Solution Candidate #1 client
- No data migration required – only database upgrade
- Named and Casual users can access via desktop or web browser
- Additional module available to integrate with Outlook
- Additional module available to export accounting data to MS Dynamics
- Ability to create distribution lists based on database queries which can be distributed via partnered email marketing company
- Some database customization available via administration tools provided
- Some ability to customize application or purchase previously developed custom modules

#### CONS

- Large and potentially complex program with many features included which are not required by client
- Current eSeries modules not capable of direct upgrade – must purchase new modules or redevelop current ones
- Although still Solution Candidate #1, the new version will be different than current version and will require retraining
- Custom database fields and labels are available but anything too complex will require specific knowledge to implement
- Customization of the program is possible but specific knowledge is required – Solution Candidate #1 support recommends having someone on staff trained and delegated to maintaining system
- Additional modules for Outlook, web access, etc. will require additional licenses
- Fairly complicated licencing model
- No guarantee some current issues/shortfalls are resolved in new version

## 5.2 SOLUTION CANDIDATE #4

A full web-based solution, Solution Candidate #4 was converted from a desktop solution in mid-2009 by Product Company. According to the 2010 AMS Industry Study published by a

reputable firm, it is expected that "...the market for SaaS (Software as a Service) and hosted subscription AMS products (will) increase and steadily move up the market". As such it would be advisable to consider moving in this direction during this next transition as it may become necessary in the future.

Solution Candidate #4 is one of the stronger contenders in this online only market and their interface is friendly and relatively straight forward. What it offers in ease-of-use however may be counteracted by its more limited customization options. Custom fields can be created but new or custom functionality would need to be developed independently and then connected to the core application via an API solution. This does offer a valid solution but will require the contracting of third party consultants and additional fees to be paid to Solution Candidate #4 for the development of the API. This, combined with the template-based reporting system, possibly makes Solution Candidate #4 the least flexible of the three solutions.

#### COUNTRY OF ORIGIN

Canada

#### COST / LICENSE STRUCTURE

- \$5,000 one-time setup fee package
- 1 User (3 Year Contract) = \$99/MTH
- 10 Users (3 Year Contract) = \$299/MTH
- 10 Users (No Contract) = \$349/MTH
- "Named" (Full) users – access to all modules

#### ESTIMATED INSTALLATION TIMELINE

- 4-6 weeks data prep
- 2-4 weeks training and consultation

#### PROS

- Web-based solution provides access from any location with an Internet connection
- No need to install software on individual work stations
- Upgrades implemented automatically
- Some limited database field and label customization available
- Ability to create distribution lists based on database queries which can be distributed via partnered email marketing company

#### CONS

- Additional custom data may need to be stored in independently created applications and connected to via custom API solution
- Reporting features are template based with 66 templates available

- No ability to restrict access to specific features or modules – all users get full access
- Client must provide their own mail server
- Export to Outlook – no direct integration
- No document management

### 5.3 SOLUTION CANDIDATE #7

Solution Candidate #7 is a full member management system. Based on their Web Oriented Architecture, access is available via a web browser, mobile device or thin-client application.

The following excerpt was taken from a website dedicated to helping non-profits make smart software decisions...

"The Solution Candidate #7 approach is more of a custom engagement. The system has strong member relationship management functionality, including support for project and association process management. As an example, its exhibit hall support includes floor plan design tools, helpful for larger-conference engagements. Custom pricing depends on the features and services required, but expect costs in the same range as the other solutions in this class or higher."

Similar to the Solution Candidate #1 solution, it is my opinion that many features and offerings packaged with Solution Candidate #7 are beyond the client's needs and geared to a much more complex organizational structure. Although not all features must be used, the fact that they are bundled with the application (whether useful or not) can add unnecessary overhead and complicate the learning curve as new users learn to navigate the system. An interesting note, as over-stocked as Solution Candidate #7 appears to be for the client's needs according to the industry, Solution Candidate #1 itself is still a step above it in the solutions ladder, targeting "...larger professional or trade associations who have the technical staff in place to adopt and sustain enterprise software...".

#### COUNTRY OF ORIGIN

U.S. with Canadian clients

#### COST / LICENSE STRUCTURE

- Pricing not available without submitting RFP
- Choice between "Named" user licences or Concurrent licences
- Fees for access to web modules based per module not per user

#### ESTIMATED INSTALLATION TIMELINE

- Average 6 month transition process including meetings, data migration, testing, etc.

#### PROS

- Multiple connection options including thin-client, browser and mobile device
- Custom fields and labels can be added via admin area
- Ability to customize work area to display preferred features
- Integrates with Outlook and MS Exchange
- Ability to create distribution lists based on database queries which can be distributed via mass email

#### CONS

- Large and potentially complex program with many features included which are not required by client
- Some custom database fields and labels are available but personalized customization might not be available or will require additional modules be developed
- Provider is based in the U.S. which may present some issues or, at the very least, some delays
- Very involved set up process with a lengthy ramp time

### 5.4 CUSTOM DEVELOPED APPLICATION

As an alternative to "off the shelf" solutions, a custom developed application has the potential to better meet the client's requirements as well as add flexibility when incorporating new features. The client's needs and behaviours are integrated into the design process reducing the learning curve and making for a more streamlined work experience without the added overhead of unnecessary components.

With a custom solution only the components required by the client are included but every effort can be made to allow for future advancement and flexibility. Concerns regarding points of access and security would be addressed and integration with the client's existing software and procedures can be integrated wherever possible in a more direct fashion.

In addition to being able to tailor the solution to fit the requirements, the client would gain the added benefit of reducing their relationships with multiple vendors and consultants. Future updates and adjustments would be more readily available in a direct one-on-one relationship with the developer as opposed to one of a large number of customers seeking personal attention within a broad market base.

## 6.0 SUMMARY

Based on the research gathered, it appears very likely that the client will require the assistance of a third party vendor to either provide additional development services or to manage aspects of each of the three pre-packaged solutions identified. In the case of managing the data and web-based access there may also be the additional need for hosting, email and/or IT services and support.

Two of the three solutions offer greater flexibility but at a much higher cost and with many extraneous features. It is my opinion that the client would benefit more from a targeted solution which is in tune with their specific needs. Although any one of these solutions can be used, it is almost definite that some adjustments will need to be made and the client will require additional technical consultations throughout the transition process.



## 7.0 RECOMMENDATIONS

It is my recommendation that the client further investigate custom development as a viable solution. Although the up-front resources required to develop a custom solution can initially outweigh an existing product, the lifetime benefits will exceed pre-packaged solutions and there are avenues which can be explored to help offset the cost.

If the client has an interest in custom developing a solution, a proposal can be created outlining the necessary costs and timelines.

If the client decides to forego custom development as a viable option, it would be my recommendation to solicit a detailed proposal from one or more of the candidates offered in this report.

