

PARTNERING FOR MUTUAL SUCCESS

AMS Selection Process



AMS/CRM Selection: Discovery

1. Planning and Kick Off (Complete)
2. Data Collection Interviews (CURRENT STAGE)
WEF Staff and MA's
3. Preliminary Findings (March)
4. Analysis and Research (March)

AMS/CRM Selection: Solicitation & Selection

Solicitation

- March/April
- Develop Request for Proposal

Selection

- Spring/Summer
- Full Day Demo
- Select Finalists
- Prepare Impact Report
- Review Proposals
- Conduct Reference Checks
- Select Finalists

Contracts

- Summer
- Finalize Contract for selected vendor

Survey Results

- 29 responses/28 MAs
- Use of an AMS: 18
- Excel/Personify (WEF): 10

Key Demographics: Membership or Marketing

	HIGH USAGE	MEDIUM USAGE	LOW USAGE	DON'T USE	TOTAL
Organizational Code	13.79% 4	13.79% 4	17.24% 5	55.17% 16	29
Job Title Code	6.90% 2	17.24% 5	24.14% 7	51.72% 15	29
Focus Areas	13.79% 4	6.90% 2	27.59% 8	51.72% 15	29
Concentration Area	13.79% 4	10.34% 3	13.79% 4	62.07% 18	29
Education	3.45% 1	10.34% 3	31.03% 9	55.17% 16	29
Years in Industry	6.90% 2	24.14% 7	20.69% 6	48.28% 14	29
Gender	3.45% 1	27.59% 8	20.69% 6	48.28% 14	29
Ethnicity	3.45% 1	3.45% 1	13.79% 4	79.31% 23	29

Online Experience

- Access/updating information
- Login
- Tracking WEF and MA membership

What would you like from WEF's system?

ANSWER CHOICES	RESPONSES	
Ability to have our own membership and meetings within WEF's software platform	37.04%	10
Ability to update member information within WEF's software platform	81.48%	22
Ability to extract our data from WEF's platform from Excel .csv files	92.59%	25
Ability to directly import and export WEF data into our association tool	77.78%	21
Total Respondents: 27		

Pain points

- Online: Access/updating information
- Online: Login
- Online: Tracking WEF and MA membership
- Reports
- Differences between MA and WEF data
- Importing data from WEF to MA
- Difficulty accessing WEF system

Requirements Workshop

- 5 Topics
- 10 min for each topic
- 1 idea per post-it note

- BREAK

- Rank and Report