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*presents*

# **Getting to Your Final Rose – An AMS/CRM Selection Show**



**OCTOBER 2021**

# Ground rules...

- This session is being recorded!
- No question is off limits! This is a safe space, but we understand if you wish to remain anonymous. (Use the Q&A Function)
- Ask them in chat and we will do our best to address them as we go
- If the question is too specific to a particular situation, we may defer it but are happy to talk to you offline or after the event.
- Each session is worth 1 CAE credit – details to claim emailed tomorrow



# Our Presenters



## OLIVIA WILKINS

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**Olivia Wilkins** learns and conveys complex business systems, creates curriculum to deliver training programs, and collaborates with technical and non-technical stakeholders to develop project specifications, implementation plans, and user adoption strategies. Her experience in education, team building, and change management has led to the successful implementations of several medium- and large-scale IT projects while emphasizing the importance of taking a person-centered approach.



## JAMES C. MARQUIS

Chief Information Officer, 501Works  
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**James C. Marquis** is a seasoned senior executive with more than 30 years of experience working in technology with a wide variety of associations and nonprofits. James' work experience includes serving as CIO for a large medical association, CEO of a technology consulting organization and senior roles in product development and business consulting for for-profit and nonprofit clients. He also has designed and built multiple Internet-based business applications including Mojo Middleware™.



# To set the stage...

A PwC study of over **10,640** projects found that a tiny, tiny portion of companies – **2.5%** – completed **100%** of their projects successfully.

The rest either *failed* to meet some of their original targets or *missed* the original budget or deadlines.

## SOURCE:

Forbes -

<https://www.forbes.com/sites/steveandriole/2020/12/01/why-no-one-can-manage-projects-especially-technology-projects/?sh=5e6e2faa2da2>



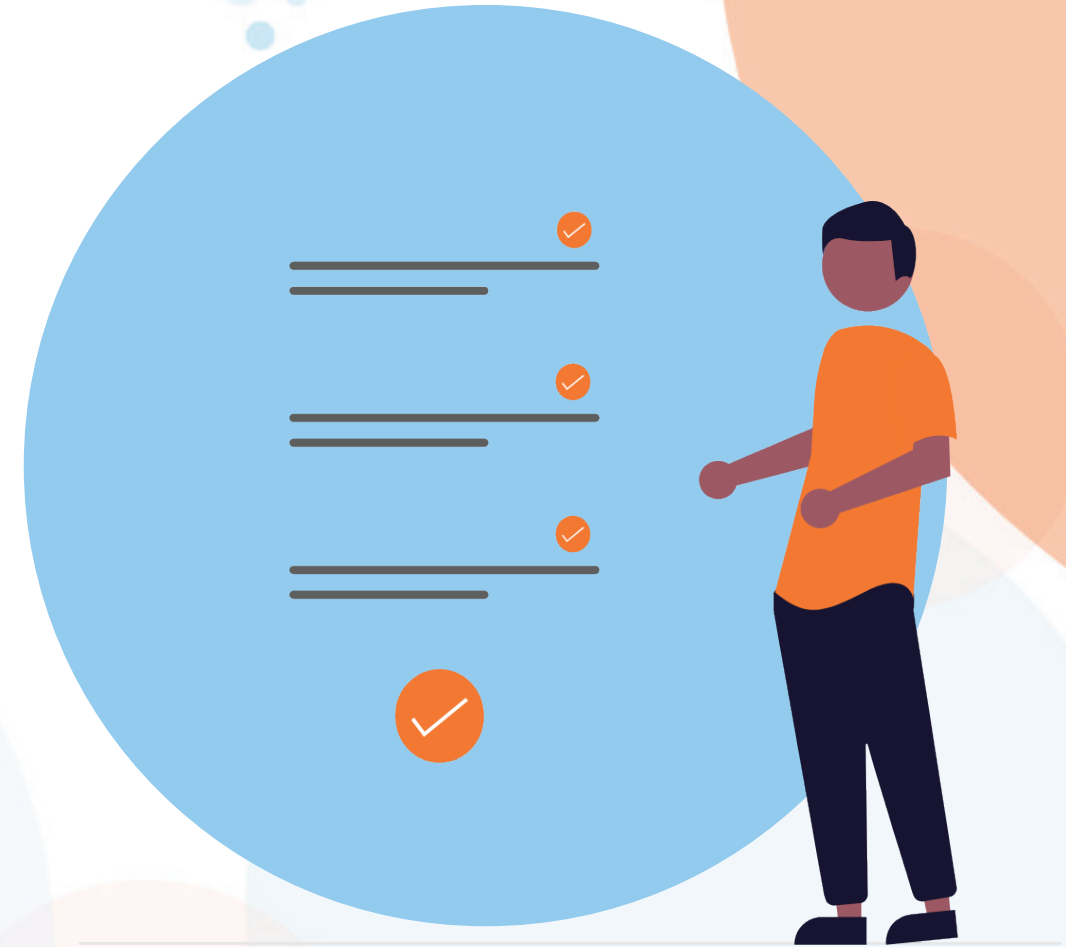
# Getting to Your Final Rose

- Why the Bachelor/Bachelorette comparison with AMS/CRM selection?
- Today's session will help you
  - Take the mystery out of system selection
  - Build a plan to find the best match possible
  - See proven ways to find your perfect “rose” in the sea of AMS/CRM suitors
  - Learn some hidden truths about the selection process



# Know Before You Go!

- Document your requirements – in detail!
- Prioritize them
  - Must Haves
  - Nice to Haves
  - Entirely Optional (Just Exploring)
- Create a “Top 10” List – Your Pillars
- Take stock of your data and its condition
- Set project goals
- Calendar hurdles



# Avoid the Legacy Trap

- Requirements based on business rules and needs – not current processes
- Requirements should be system agnostic
- Be open to embracing a different way of doing things
- Each system has its own strengths and best practices
- Leave the unwanted/unneeded behind, including data



# Think About Demos Differently

- Pre-RFP Demo (First Date)
  - General is OK. See what the vendor emphasizes
  - AMSFest, ReviewMyAMS, ASAE Demo Day – lots of places to look
- General Demo (Courting Each Other)
  - Good place to share your pillars with the vendor
  - How do they tailor the demo to showcase your needs
  - Invite the full SME team and hold feedback session ASAP
- Scripted Demo – it's all about you – (Meet the Parents)
  - See how they may handle quirky or unique requirements that you have
  - Ask for someone technical and ask for a sandbox for your power users
  - This is a once every 5-to-10-year decision – take the time to validate it





# Own It!

- You, not the Vendor, need to drive the process
- Be careful of misdirection
- There are many vendors that can do what you want
  - Narrow your list based on who does what you need the best
- Remember to go back to your lists!
  - Must-haves
  - Nice-to-haves
  - Top 10 List - Your Pillars



# Craft Your RFP – Key Areas

1. Organizational Overview and Background
2. Project Goals
3. Project Requirements (Your Needs)
4. Vendor / Platform Information Request
5. Proposal Response Format
6. Communication Rules
7. Evaluation Criteria and Schedule
8. Legal Requirements



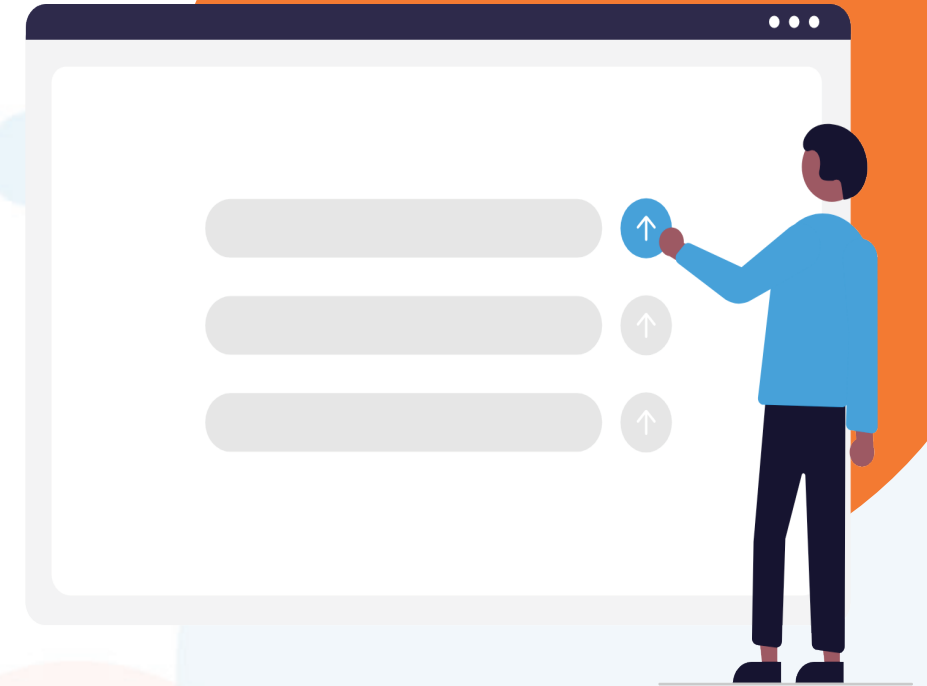
# Common RFP Pitfalls

- Distribution to too many vendors
  - Target no more than 6 – 8 participants
- Setting unrealistic deadlines
- Overgeneralizing requirements & jargon
- RFP is everyone's chance to make a good impression
- Lack of communication with the vendors
  - Early call with the vendor to ask questions
  - Scripted demos
  - Clarification questions go both ways
- Negotiating is part of this process – don't be afraid to ask for what you want
- Don't limit yourself before you start



# Select your Final Three

- Review RFP responses with an eye to ranking them
- This process takes time – especially for SMEs and staff that must fit this around their normal workloads
- Closely review system costs (launch vs ongoing) – it is OK to start negotiating here
- Gather feedback from other staff/departments for broad range of input





# Who Gets Your Final Rose

- Continue to refine your evaluation through the Final 3
- Use the final demos to hone your selection and ask deep questions
- Pay particular attention to your pillars
- Power users should carry a lot of weight, but ultimately it is an executive call
- Keep looking for red flags
  - Check vendor references
  - Read vendor reviews
  - Reach out to your peers
- Prepare to “Present Your Case” with executives & the BOD



# Negotiating Your Union

- Get your contracts reviewed
- Include accountability
  - Service Level Agreements (with consequences)
  - Data Security Standards
  - Privacy Controls
- Memorialize your requirements and the RFP response in the contract
- Contingencies for suspension of business
- Leave yourself appropriate outs



# It's a Small World Afterall

- **Vendors are people too!**

They work hard to give you what you are asking in your proposal. Be fair with timing, concise and diligent about what your true needs are for launch and specific about what is just nice to have information.

- **Pricing is important!**

You may not be able to disclose your budget, but at least let them know your range/s. No one goes to a realtor without letting them know they want a condo, rambler, or 5-bedroom family home with a great back yard. Associations should try to envision what they want and communicate that as clearly as possible at start of the process.

- **Talk to them!**

If there is one or two things in your RFP response that doesn't meet your needs, let them know – there is always room for negation and adjustment.

- **Don't ghost them!**

If you don't select a vendor, please provide feed back and let them know why you chose the firm you did and what their proposal lacked. Constructive criticism helps everyone be better.



# Other Questions?



# AMS/CRM Software Selection Survey

- Selecting and implementing a new AMS/CRM can be a painful, disruptive process for associations and their staff. Software projects also experience a high failure rate. There needs to be a better way to handle this critical task.
- It's time to envision a different approach that will help all stakeholders meet their objectives in an easier, more productive way. Be part of the solution by sharing with us your experience as we craft tools and education to help the industry navigate these tricky waters.



**TAKE OUR SURVEY**



# 501Works

Founded by experienced executives envisioning a better way to make technology work for associations.

## PRODUCTS & SERVICES



**Mojo Middleware™** - 501Works's flagship product to easily integrate association software.



**Software Mage™** – a tool that helps you navigate the AMS/CRM selection process, gather requirements, draft your RFP, and evaluate vendor responses.

**501WORKS**

**Customized Software Solutions and Integrations**  
**IT Consulting Services**  
**Advanced Web Design and Content Solutions**



## Ask the CIO...

**We are here to help!**

**30-minute free** consulting session for today's participants. Call or email us:

 **703-459-9779**



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