



3<sup>RD</sup> EDITION  
2025 AMS/CRM SYSTEM  
SELECTION SURVEY RESULTS

2025

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## ACKNOWLEDGMENTS

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501Works and Branching Knowledge would like to send a special “thank you” to:

**Association Brain Food**

Deirdre Reid, CAE  
*Freelance Writer*

**League of Association Technologists**

*League Planning Committee*

**PerByte**

Josh Carlson  
*Founder & Chief Innovator*

Thank you for helping to promote the survey to associations, vendors, and consultants.

Our deepest thanks goes to **the survey participants!** Your continued contribution to this research makes a significant difference in supporting your peers on their system selection journey.

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# INTRODUCTION

## DELIVERING TECHNOLOGY THAT WORKS FOR YOUR ASSOCIATION

501Works is an advanced software engineering, consulting, and solutions company with a deep knowledge of AMS/CMS systems, website delivery, systems integrations, data management and business applications. Our experience and knowledge is built in to our innovative products, including Mojo Middleware and Software Mage.

### Why We Did This Survey

Organizations evaluating a new association management system (AMS) or customer relationship management system (CRM) are often faced with a process that is far more complex than simply selecting new technology. System selection requires organizations to carefully examine their operational goals, internal processes, staffing capacity, and long-term strategic priorities to identify a solution that can effectively support both current and future needs.

From balancing budgets and timelines to managing stakeholder expectations and evaluating competing platforms, organizations frequently encounter challenges at every stage of the journey. Many also discover that success depends not only on the technology itself, but on strong communication, thoughtful planning, and organizational readiness for change.

Understanding these common challenges is essential for organizations seeking to make informed decisions and maximize the value of their AMS or CRM investment. Industry feedback and survey data have continued to highlight recurring themes in system selection revealing where organizations are succeeding, where obstacles persist, and how the landscape continues to evolve.

### How To Use This Report

This report focuses on the results from the 2025 survey while also revisiting the demographic information from the 2021 and 2023 survey results. The goal of the report is to provide insight into the experiences of all categories of participants in the system selection process.



# SURVEY METHODS

## Survey Participant Groups

The survey targeted participants who have been involved in **AMS/CRM system selection** during their careers. Respondents were placed into participant groups based on their response to the first survey question asking them to self identify as **Association Staff**, **Association Management Company Representatives**, **Vendors/Solution** providers, or **Consultants**. If the survey respondent fell outside of these groups but had experience with system selection, they were given the opportunity to provide their contact information for consideration for future research.

## System Selection Timeline

Association Staff were categorized by having selected a system within the past five years (even if that system was not yet implemented) or in the process of selecting a system. Association Staff who identified as neither of those groups, specifically who selected a system six or more years ago or who were not preparing to go through system selection, were given the opportunity to provide their contact details for inclusion in future research. Five years was chosen as the boundary timeline for system selection respondents with the hope that the memory would be recent enough to be recalled for the survey but not too distant that significant details were forgotten. Respondents who were AMC Representatives who manage one organization at a time were given the same questionnaire as Association Staff.



# SURVEY METHODS

## Research Questions

The survey was driven by four research questions:

- Are the feelings of AMS/CRM selection participants positive, negative, or neutral towards the AMS selection process?
- What are the key factors driving the AMS/CRM selection participants' feelings towards the selection process?
- How would the creation of a standardized approach to AMS selection benefit selection participants?
- How would the automation/digitization of the selection process benefit selection participants?

## Survey Overview

Participants answered between **5** and **48** survey questions depending on their participant group. The questions collected responses across several topics of interest including demographic information such as understanding the type of organization they work for or service, the roles they played or expect to play during system selection, their level of comfort with certain aspects of the system selection process, and their overall impressions of their experiences.

The survey questions also asked participants to share the reasons for their feelings about their experiences, share an overview of the processes they followed or plan to follow during system selection, identify what they would do differently with the process if faced with another system selection, and other insights about dealing with RFPs and system selection.

The 2025 survey included refined versions of the questions from the inaugural and subsequent surveys and presented new questions to gain additional insight from those who selected a system outside of the recent five year period of time and from AMC Representatives who manage more than one organization.

The survey, which ran from October 2025 to February 2026, received **179** responses representing more than **130** associations, **22** AMS/CRM solution providers, and **17** consultants.

# SURVEY PARTICIPANT GROUPS



## ASSOCIATION STAFF - 64% OF RESPONDENTS

**116** Association employees participated in the survey. **19%** of the Association employee participants are in the process of searching for a new system. **60%** of Association respondents selected a system within the past 5 years.



## VENDOR - 12% OF SURVEY RESPONDENTS

**22** Vendor employees representing **14** AMS/CRM solutions



## CONSULTANT - 9% OF RESPONDENTS

**17** Consultants representing **6** consulting organizations



## ASSOCIATION MANAGEMENT COMPANY REPRESENTATIVE - 10% OF RESPONDENTS

**18** AMC representatives responded to the survey. **15** were managers of multiple organizations, and **3** manage one organization. Managers of one organization responded to the same survey questions as the Association Staff.



## OTHER INTERESTED PARTICIPANTS

**6** Survey respondents with experience in the system selection process fell outside of the targeted participant groups but were given the opportunity to share some general information for inclusion in a future survey. This included Association Staff who completed selections more than 5 years ago or who are preparing for system selection in the near future, as well as consulting groups or vendors who provide specific services that may fall outside of system selection and implementation.

# ASSOCIATION STAFF DEMOGRAPHICS

Fig.1

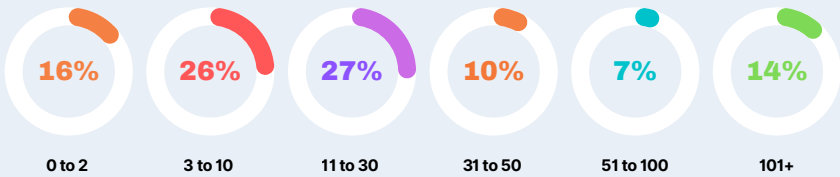
## Organization Type



\*"Other" Organization Types included honor societies and service club entities.

Fig.2

## Number of Employees at Association Staff Organizations



Most Association Staff respondents are based at organizations with 3 to 30 staff.

Fig.3

## Length of Time on Legacy AMS/CRM



Most respondents reported organizations keeping the legacy system for 5 to 10 years.

# ASSOCIATION STAFF PRIMARY FUNCTIONS AND DEPARTMENTS AT ORGANIZATIONS

Fig.4

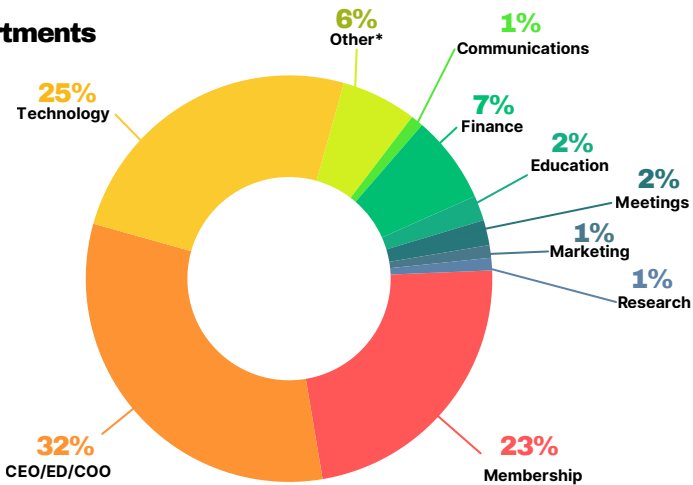
## Primary Function at Organization



Most Association Staff survey participants were Manager/Director level at the time of completing the survey.

Fig.5

## Departments



Survey participants represented various departments when going through system selection. Leadership, Technology, and Membership continue to be the most heavily represented departments.

\*6% of Association respondents highlighted Operations, Administration, and “wearing multiple hats across all departments” in the “Other” category for their departments.

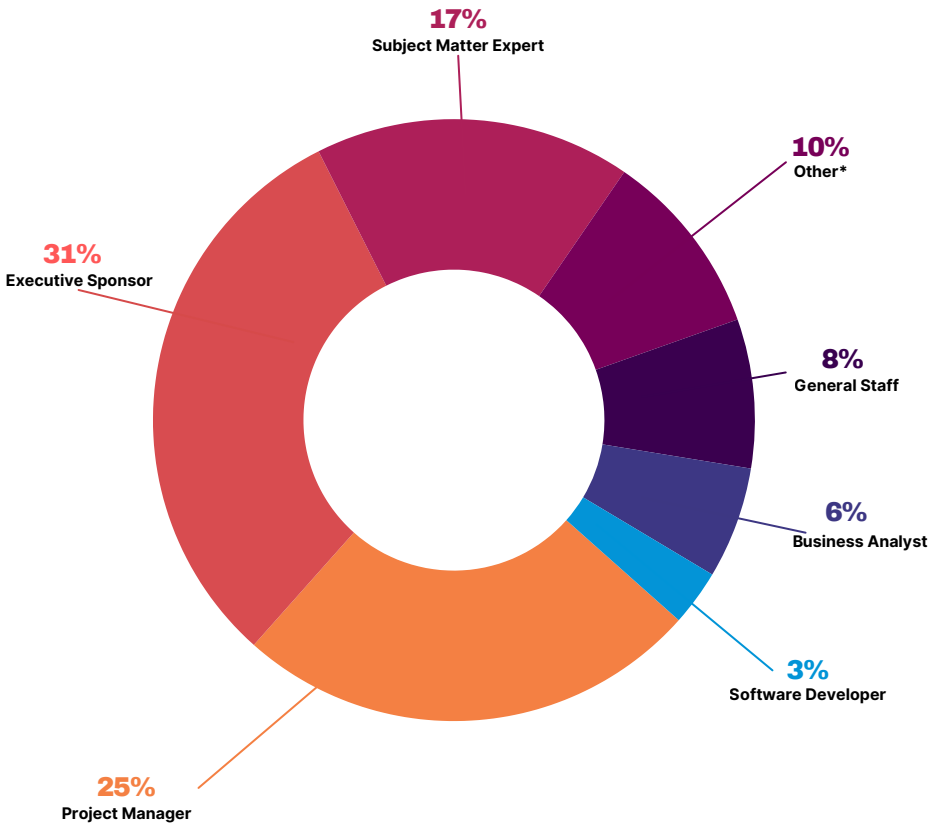
# ASSOCIATION STAFF ROLES AT ORGANIZATIONS

Most Association Staff participants identified their roles during system selection as Executive Sponsor (described as an executive-level staff who provided approval and oversight on the selection project), followed by Project Manager and Subject Matter Expert rounding out the top three roles participants filled.

\*Responses in the “Other” category were primarily respondents who held or expect to hold multiple roles.

Fig.6

## Role During Selection



# ASSOCIATION STAFF INVOLVEMENT IN SYSTEM SELECTION



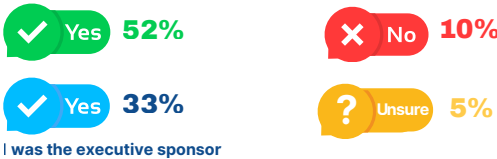
## ASSOCIATION STAFF INSIGHTS

What challenges did you face during AMS/CRM project? "Vendor's implementation process was poor. Once implementation started, many of our requirements were ignored, or the implementation team was unaware of them...The vendor's PM refused to consider any training until the end of the implementation process at UAT. This led to incorrect decisions being made during implementation due to lack of system comprehension...The vendor also left one of the most important parts of the implementation for us to the end, and then discovered that the system didn't meet one of our key requirements."

### Executive Sponsorship

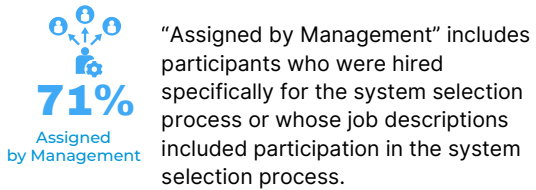
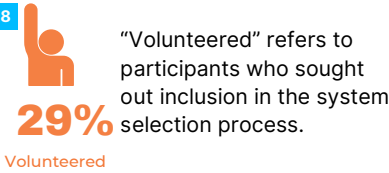
Participants were asked whether the project had an Executive Sponsor, defined as an executive-level staff member who provided approval and oversight of selection and implementation. Most respondents had an Executive Sponsor, and a third of respondents acted as the Executive Sponsor.

Fig.7



### How Staff Became Involved in Selection

Fig.8



## CONSULTANT INSIGHTS

Most Consultant respondents (54%) assist no more than 5 clients with system selection each year. 23% of respondents assist between 10 and 20 clients in a year.

# ASSOCIATION STAFF INVOLVEMENT IN TECHNOLOGY IMPLEMENTATION

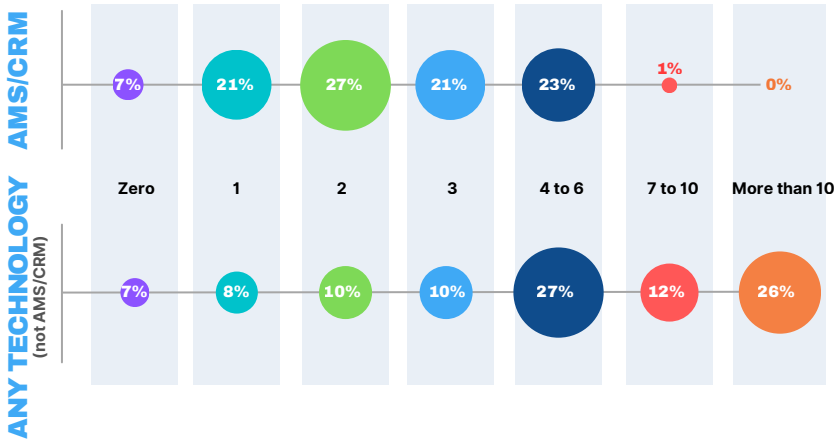


## ASSOCIATION STAFF INSIGHTS

If you could do the selection process all over again, what would you do differently? "Create a larger plan for data migration and involve more staff. Doing this as a small staff association...was difficult. We also had to migrate our website to a new CMS at the same time as it was bundled with our old AMS, so that made the project even more complicated."

Fig.9

### Number of Times Assn. Staff Selected/Implemented Systems



Most of the Association respondents have selected and/or implemented 2 AMS/CRMs and 4 to 6 other systems in their careers.



## CONSULTANT INSIGHTS

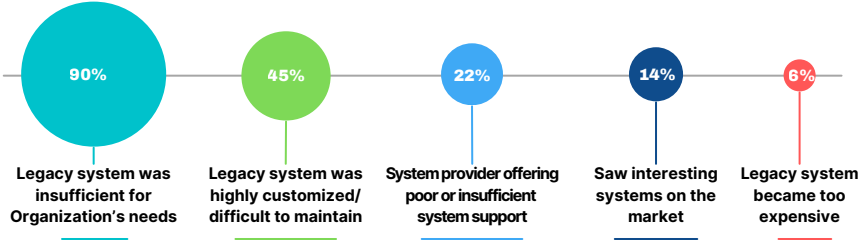
"62% of respondents create between 1 and 5 RFPs in a year. 46% review up to 10 Vendor proposals on behalf of clients in a year."

# SYSTEM SELECTION DECISIONS

77 Association Staff respondents selected the reasons their Organizations decided to transition from the legacy system. **NOTE:** Respondents were able to choose as many reasons as were appropriate for their situations.

Fig.10

## Reasons for Associations Changing Legacy System (n=77)



50%

### CONSULTANT & VENDOR INSIGHTS

50% of Consultant respondents and 67% of Vendor respondents identified "Legacy AMS/CRM was insufficient for Organization's needs" as the primary reason clients share for seeking a new system.



67%

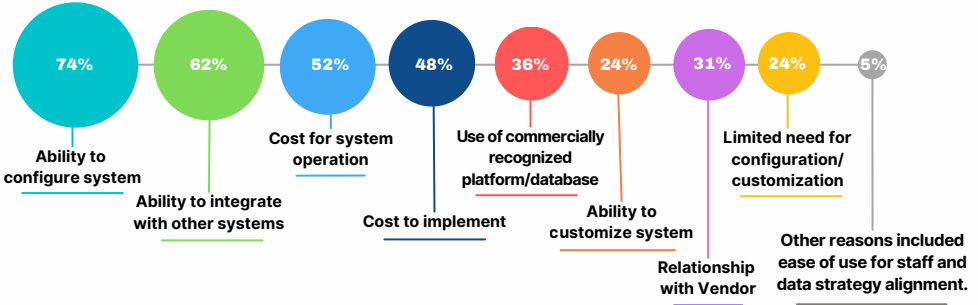
VENDORS

# SYSTEM SELECTION DECISIONS

58 respondents who selected a system within the past five years identified the reasons that led to the final system choice.

Fig.11

## Reasons for System Choice (n=58)



**NOTE:** Respondents were able to choose as many reasons as were appropriate for their situations as well as provide any reasons under the "Other" category that weren't already listed.



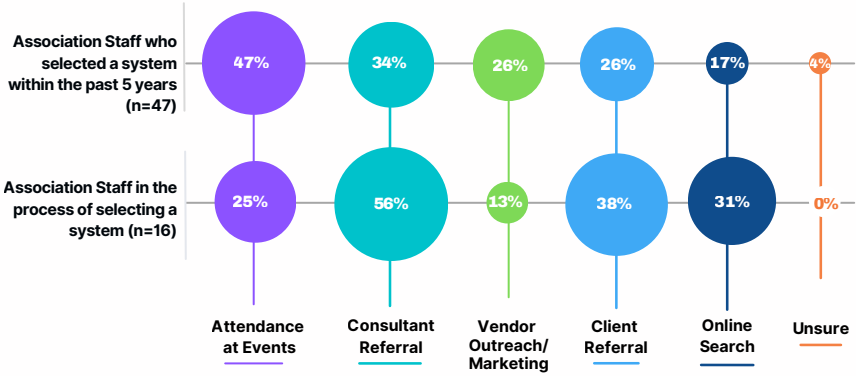
### VENDOR INSIGHTS

"Requirements are phrased very specifically to make minor corner cases required - very frequently, as later discover, they are 'nice to have' or not actual requirements. Nevertheless we must read, and respond to them, and they impact the final proposal, sometimes significantly."

# SYSTEM SELECTION DECISIONS

Fig.12

## Identification of Potential Vendors



Association respondents selected all of the ways they identified or expect to identify Vendors/Solution providers with event attendance (for those who already selected a system) and consultant referrals (for those going through selection at the time of the survey) being the most selected options.



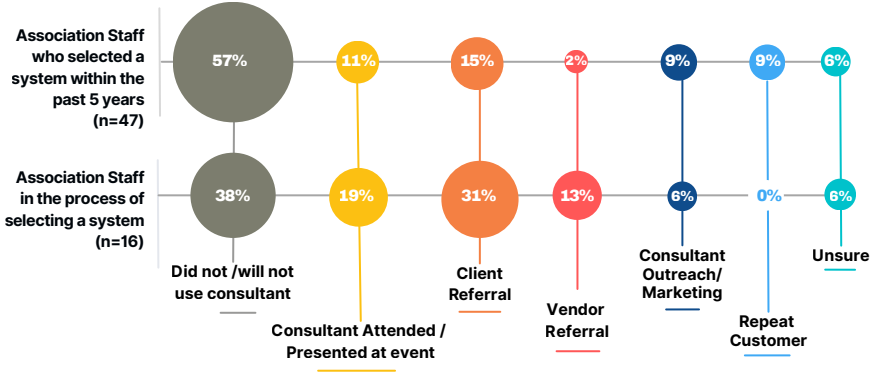
### VENDOR INSIGHTS

53% of Vendors identified Company Outreach/Marketing efforts as main sources for new clients.

# SYSTEM SELECTION DECISIONS

Fig.13

## Identification of Potential Consultants



Association respondents selected all of the ways they identified or expect to identify Consultants. Most respondents went through or plan to go through system selection without the services of a Consultant citing prohibitive costs and comfort with managing the process internally as the main reasons.



### CONSULTANT INSIGHTS

56% of Consultants identified Client referrals as the main source for new clients. 19% identified company outreach/marketing efforts as the main source.

# SYSTEM SELECTION DECISIONS

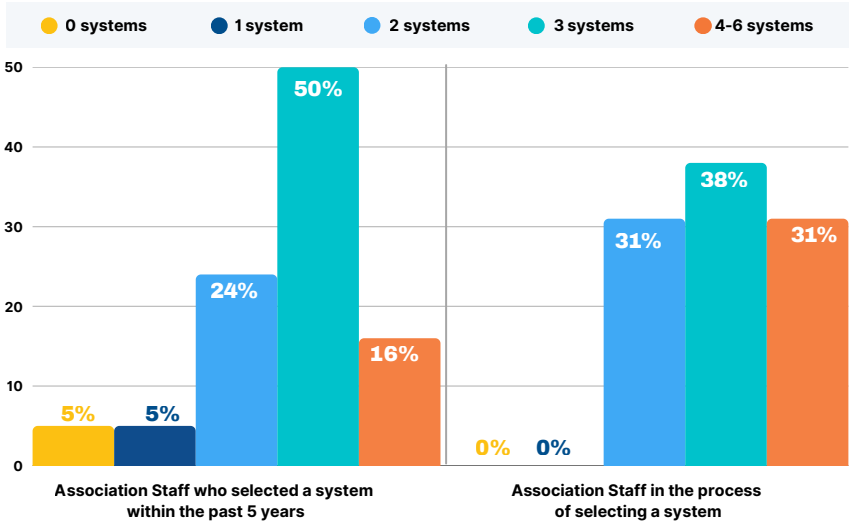


## ASSOCIATION STAFF INSIGHTS

What challenges did you face during AMS/CRM implementation?  
 "[S]ome things we were told we are finding out is only true if we pay more."

Fig.14

### Number of systems "seriously" considered for selection



Most Associations focused on, or expect to focus on, three systems as their top contenders before making a final selection. None of the respondents seriously considered or expect to seriously consider more than 6 systems as finalists.



## VENDOR INSIGHTS

45% of Vendor respondents provide three targeted demos to potential clients before a selection decision is made. 36% of respondents provide two demos. 55% said they rarely learn after the targeted demo that the system does not fit the needs of the potential client. "Targeted demo" was defined as demonstrating content specific to the organization (more in-depth than a general demo).

# SYSTEM SELECTION TIMELINE

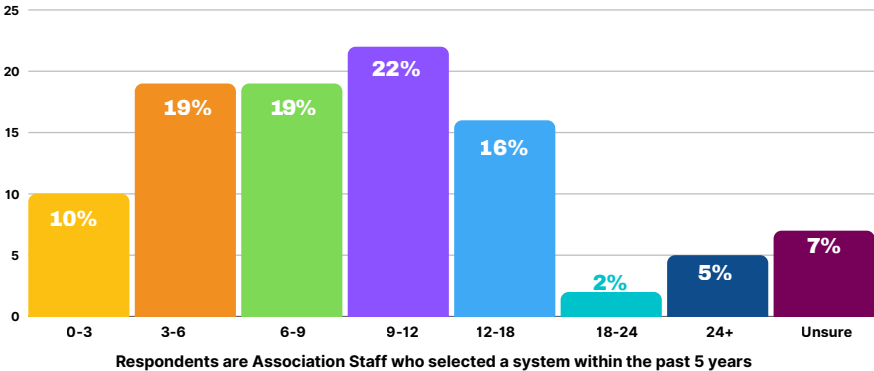


## VENDOR INSIGHTS

46% of Vendor respondents say it can take three to four days to respond to a client RFP.

Fig.15

## Number of Months b/t deciding system was needed and selecting new system



Most participants who selected a system within the past 5 years were able to make a selection decision between 9 and 12 months, with most decisions occurring between 3 and 9 months.



## CONSULTANT INSIGHTS

62% of Consultant respondents receive fewer than five requests for system selection support, and 69% shared they respond to fewer than five requests for system selection support in a year.

# SYSTEM SELECTION TIMELINE

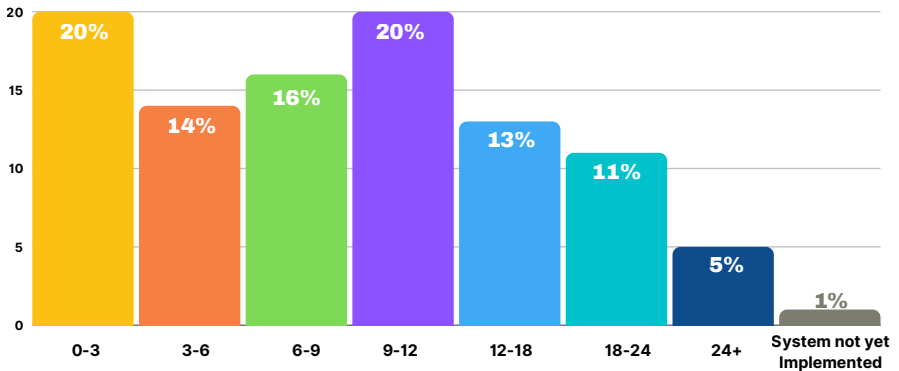


## VENDOR INSIGHTS

38% of Vendor respondents receive and respond to between 10 and 20 RFPs per year.

Fig.16

## Number of Months b/t system selection and system implementation



Respondents are Association Staff who selected a system within the past 5 years

20% of participants who selected a system within the past five years were able to implement the new system 0 to 3 months or 9 to 12 months after selection.

## ASSOCIATION STAFF INSIGHTS



"We weren't sure which features and functionality were typically included in an AMS beyond membership data and transactions. Although we had compiled a long list of AMS providers, we weren't sure which might be the best fit for our needs. As a result, we needed help assessing the needs that could be addressed by an AMS, documenting them for an RFP to apply specifically to an AMS search, and selecting appropriate AMS candidates to consider."

# SYSTEM SELECTION TIMELINE

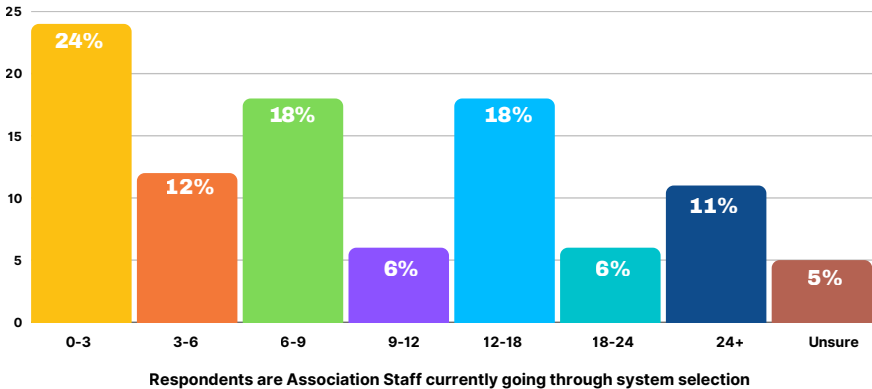


## VENDOR INSIGHTS

“Most RFP's focus too heavily on just product related 'features and functionality', and far too little on other more important considerations such as the vendor's service and support capabilities, the vendor's financial strength/long-term viability, the vendor's product development/upgrade processes and procedures, and other non-product related vendor attributes that are often much more important to the successful deployment and use of the software than the product's features and functions.”

Fig.17

### Expected number of months for system selection



Almost a quarter of Association Staff currently going through system selection expect to have a decision made within 3 months of starting the search.



## CONSULTANT INSIGHTS

54% of Consultants said they rarely assist a client with selecting a new system and then not assist with the implementation of that system.

# SYSTEM SELECTION TIMELINE

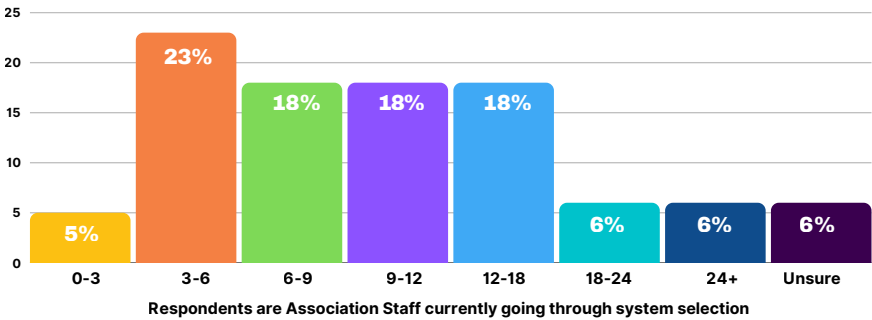


## VENDOR INSIGHTS

33% of Vendors said sometimes organizations do not include system/business requirements in the RFP and that system/business requirements are sometimes included that do NOT fit the actual system/business requirements of the organization. 25% of Vendors said the disconnect between provided and actual requirements frequently occurs.

Fig.18

## Number of months expected b/t system selection and implementation



28% of participants currently going through the process expect to implement the new system within 6 months of making a selection.



## ASSOCIATION STAFF INSIGHTS

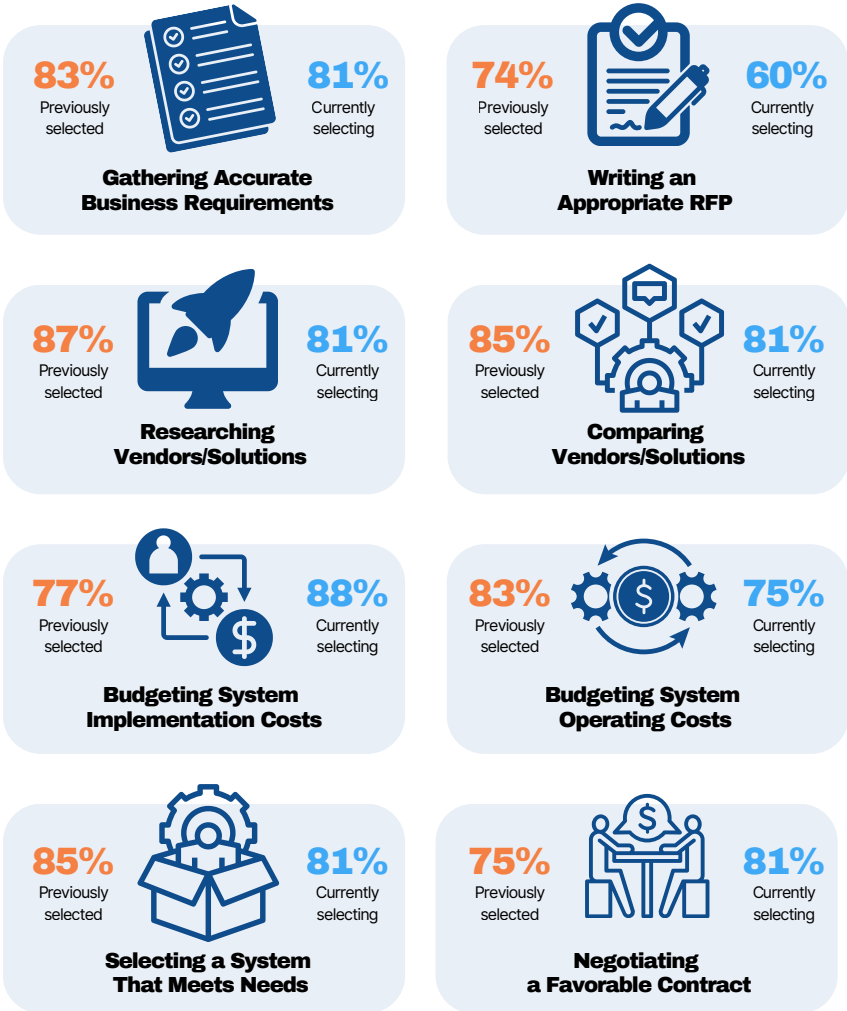
What aspects of the AMS/CRM selection process did you find to be positive?

"During the process we also learned of ways to change up our current processes or ways we can leverage non-dues revenue, etc. [S]peaking to folks in the industry for years allowed us to hear their ideas, some of which we had not thought of."

# SYSTEM SELECTION CONFIDENCE

Fig.19

## Association Staff Confidence with Major Tasks

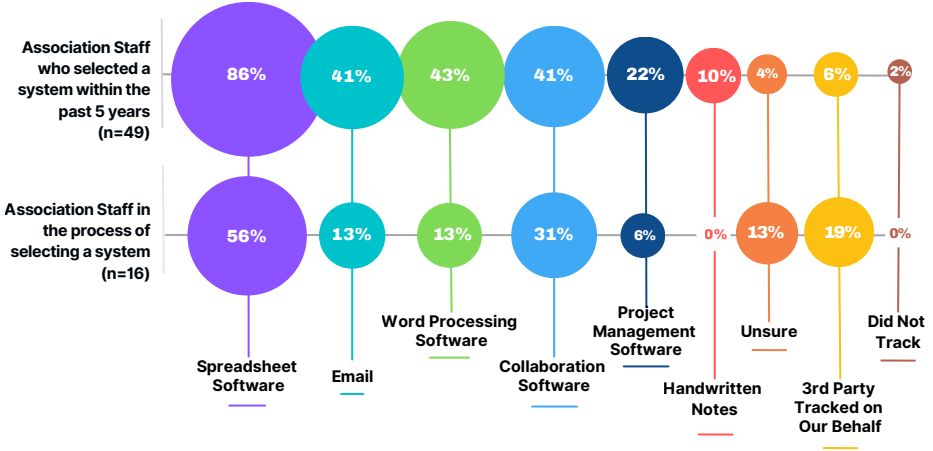


Association Staff respondents were asked to rate their level of confidence with eight specific tasks. Participants rated each task as feeling no confidence, little confidence, unsure, some confidence, and high level of confidence. Percentages displayed show respondents who expressed **some** or **high** confidence.


# SYSTEM SELECTION INFORMATION TRACKING

Fig.20

## System Selection Information Tracking



Participants selected the various ways they managed/plan to manage information during the system selection process. Spreadsheets (e.g. Excel, Google Sheets, etc.) are heavily relied upon followed by collaboration software (e.g. Sharepoint, Google Drive, etc.), word processing software (e.g. Word, Google Docs, etc.), and email. The majority of respondents chose how the information would be tracked based on staff already being familiar with the methods and because the options were cost effective or free.



**CONSULTANT INSIGHTS**

Most Consultant respondents (54%) reported an overall positive experience with the RFP and selection process. No respondents reported an overall negative experience.

# SYSTEM SELECTION PROCESS

## Participants describe the steps taken to select a new system:

“ After assessing our organization/team's needs, we used previous information compiled on AMS platforms to create a select list of vendors with which we conducted demos. We went through a series of demos on the major functional areas of each platform (membership, events, finance, etc.) before narrowing our options to the top 2. We then did calls with client referrals and further examined support and costs for each top platform. Final decision was made in consultation with our full team after sharing a written assessment of the capabilities of each of the top 2 platforms.

“ Hired a consultant for extensive business process reviews prior to developing RFP. Reviewed potential solutions with a large group (>30) staff from across the company. Hired outside company to assist with implementation.

“ We identified our needs and areas of improvement. Then we created a task force of members of our board. We began vetting vendors and presenting the task force with viable options and set up demos for them to see. We received a directive from the board to continue moving forward with contracting.

“ I looked into several, narrowed it down, contacted the vendors and set up demos. I built a comparative spreadsheet. Listed the functions I needed, wanted and functions the vendors had that I had not considered.

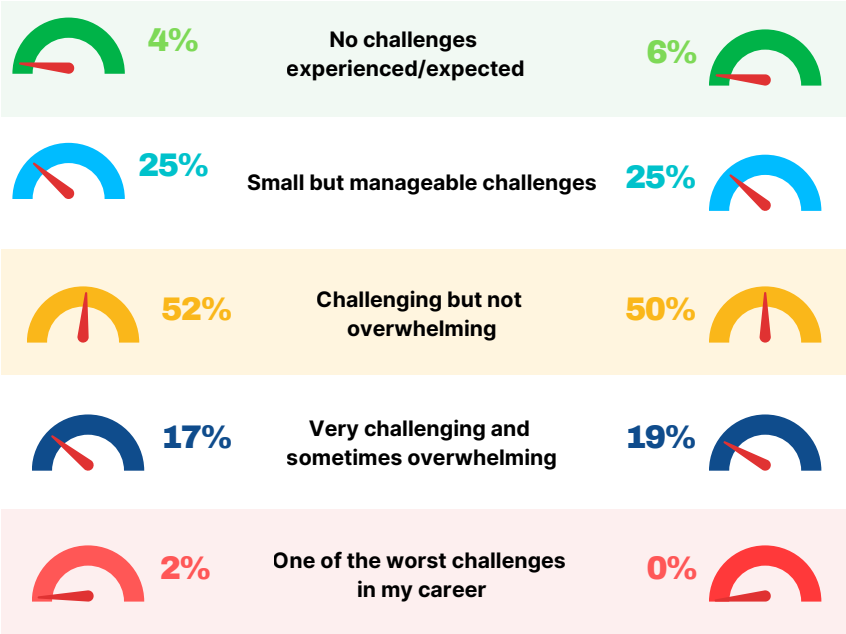
“ We have our requirements documentation. We are inviting 3 vendors to present how their product can meet those requirements, we have a criteria matrix that will evaluate the demos to gauge staff support for one over the other. All invited vendors have prices in our budget.

# LEVEL OF DIFFICULTY EXPERIENCED OR EXPECTED

Fig.21

**Selected within the past 5 years**

**Currently going through selection**



Participants identified concerns with the product living up to the sales pitch and staff constraints (including limited availability and issues with change management) as the main reasons for the level of difficulty experienced or expected during system selection. One survey participant felt system selection was the worst challenge they have experienced during their career.

## ASSOCIATION STAFF INSIGHTS



“Our consultant insisted that we only needed to send the RFP to three AMS solution providers. I expressed my disagreement, but they were confident that they could narrow the search down to the three best candidates. If I could do the selection process over again, I'd trust my judgment, override my consultant's strong advice, and send the RFP to five or more candidates.”

## LEVEL OF DIFFICULTY EXPLAINED

**Participants explain the reasons for the level of difficulty they experienced or expect to experience with system selection:**

“ Challenges keeping staff involved and informed to ensure selection was a collaborative process with stakeholders

“ Difficulty getting vendors to listen to and understand our needs; they would have preferred that we change how our industry works to fit their software.

“ Hard to know how it will actually run in reality. This is always different than the sales pitch.

“ Stakeholder management and willingness to re-engineer current processes

“ Prioritizing features needed, with cost as a determining factor. Different departments need different features. Concerned that final decision will be based on cost and not utility.

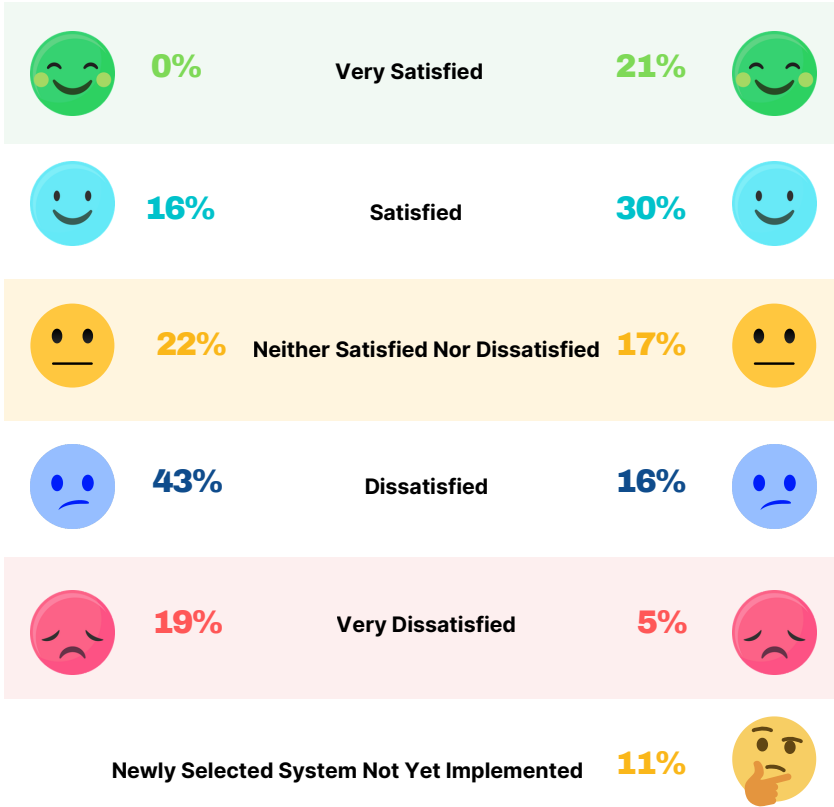
“ Weighing "all-in-one" solution vs. basic plus "best-of-class" add-ons (that add to the cost)

# LEVEL OF SATISFACTION WITH LEGACY VS CURRENT SYSTEM

Fig.22

## Satisfaction with legacy system

## Satisfaction with newly selected system



Participants who selected a system within the past 5 years shared their level of satisfaction with the legacy system compared to the newly selected system.



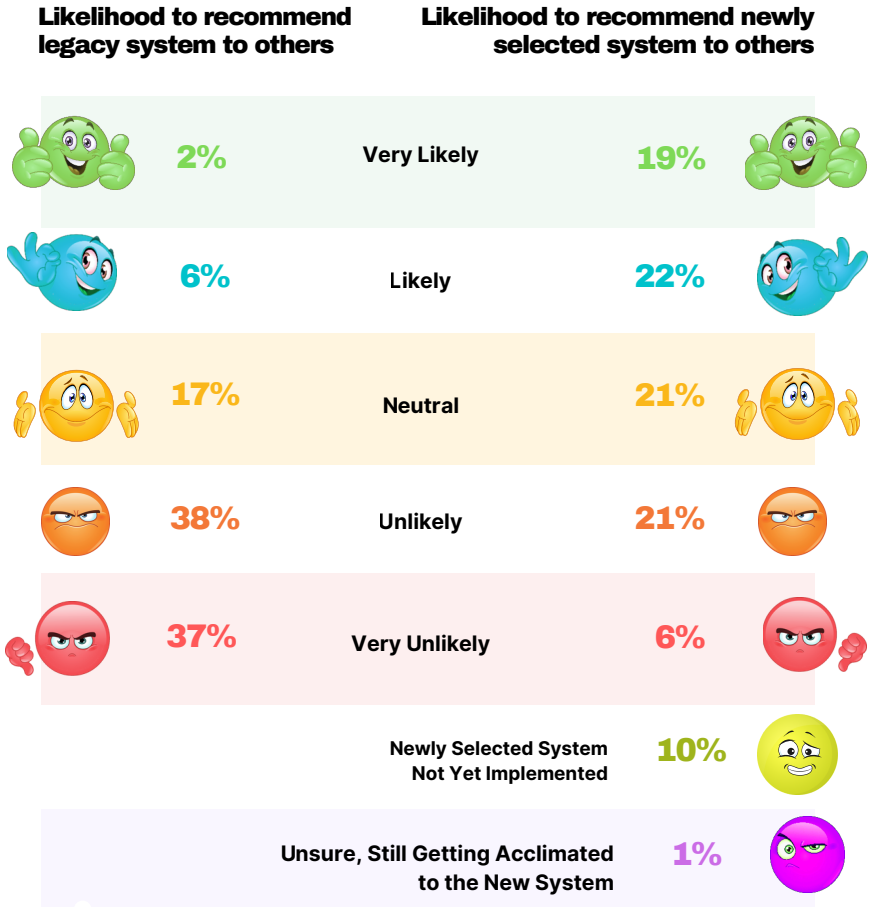
### ASSOCIATION STAFF INSIGHTS

What challenges did you face during AMS/CRM selection?

"Each AMS/CRM has its own quirks and difficulties, which are hard to predict and often discovered after [a] decision is made."

# LEVEL OF SATISFACTION WITH LEGACY VS CURRENT SYSTEM

Fig.23



Participants who selected a system within the past 5 years identified how likely they are to recommend the legacy system and newly selected system to colleagues and peers.



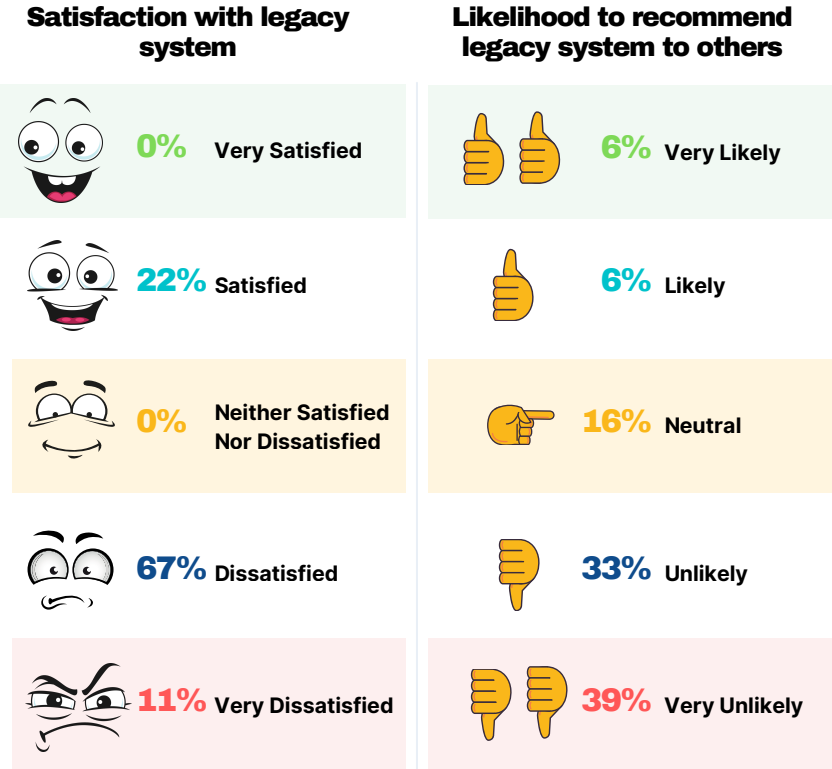
## ASSOCIATION STAFF INSIGHTS

If you could do the selection process all over again, what would you do differently?

"Maybe try to get a demo from a customer. I had recommendations, but didn't see the product in action in a real situation. Hard to do though with privacy/confidentiality issues."

# LEVEL OF SATISFACTION WITH LEGACY VS CURRENT SYSTEM

Fig.24



Participants who are currently going through system selection identified their satisfaction with the legacy system and likelihood of recommending to colleagues and peers.



## ASSOCIATION STAFF INSIGHTS

Why did your Organization decide not to use a Consultant during the selection process?

"We needed to move at our own pace and had never used a Consultant before so didn't see a need to go that route. I thought about it, but just didn't pursue it. Also didn't have a budget for it."

# OVERALL IMPRESSION WITH SYSTEM SELECTION PROCESS



## ASSOCIATION STAFF INSIGHTS

What challenges did you face during AMS/CRM selection?

"There are many things happening at the same time. [F]or example this has happened for us during conference season which is quite a busy time for us."

Fig.25

### Overall Impression of participants who selected system w/i past 5 years



**40%**  
Overall positive experience



**51%**  
Neither Positive nor Negative



**9%**  
Overall Negative Experience

### Overall Impressions of participants currently going through system selection



**44%**  
Overall positive experience



**37%**  
Neither Positive nor Negative



**19%**  
Overall Negative Experience



## ASSOCIATION STAFF INSIGHTS

What aspects of AMS/CRM selection have you found to be positive?

"It opens up staff to the possibilities of what an AMS can do for your organization in terms of internal efficiencies and member experience. It is also helpful to have a method of assessing team needs on a periodic basis."

# 2021 VS 2023 VS 2025 DATA RESULTS

## Association Staff Demographics

The following pages provide a side-by-side comparison of key data points from all three surveys.

There was a larger percentage of respondents from Professional organizations and Professional/Trade organizations, and a decrease in the number of respondents from Trade organizations compared to the last survey.

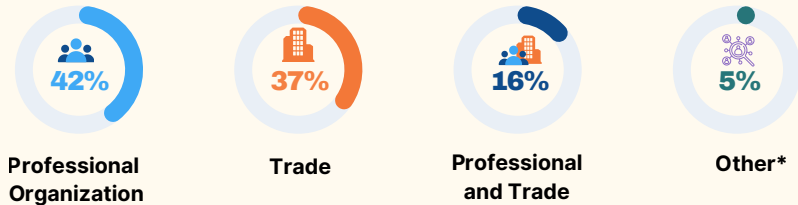
Fig.26

### 2021 Survey Organization Type



\*Fewer than 1% of respondents identified "Other" as their Organization Type.

### 2023 Survey Organization Type



\*\*"Other" Organization Types included honor societies and certification entities.

### 2025 Survey Organization Type



\*\*"Other" Organization Types included honor societies and service club entities.

# 2021 VS 2023 VS 2025 DATA RESULTS

## Staff Involvement in Selection

The number of staff who volunteered to be included in the AMS/CRM project stayed the same between the previous and the most recent survey results.

Fig.27

### 2021 Survey

#### How Staff Became Involved in Selection



14%

Volunteered

“Volunteered” refers to participants who sought out inclusion in the system selection process.



86%

Assigned by Management

“Assigned by Management” includes participants who were hired specifically for the system selection process or whose job descriptions included participation in the system selection process.

### 2023 Survey

#### How Staff Became Involved in Selection



29%

Volunteered

“Volunteered” refers to participants who sought out inclusion in the system selection process.



71%

Assigned by Management

“Assigned by Management” includes participants who were hired specifically for the system selection process or whose job descriptions included participation in the system selection process.

### 2025 Survey

#### How Staff Became Involved in Selection



29%

Volunteered

“Volunteered” refers to participants who sought out inclusion in the system selection process.



71%

Assigned by Management

“Assigned by Management” includes participants who were hired specifically for the system selection process or whose job descriptions included participation in the system selection process.

# 2021 VS 2023 VS 2025 DATA RESULTS

## Length of Time on Legacy System

The 5 to 10 year time range continues to be the typical period of time for how long organizations kept their legacy systems.

Fig.28

### 2021 Survey

#### Length of Time on Legacy AMS/CRM



Most respondents reported organizations keeping the legacy system for up to 10 years.

### 2023 Survey

#### Length of Time on Legacy AMS/CRM



Most respondents reported organizations keeping the legacy system for 5 to 10 years.

### 2025 Survey

#### Length of Time on Legacy AMS/CRM



Most respondents reported organizations keeping the legacy system for 5 to 10 years.

# 2021 VS 2023 VS 2025 DATA RESULTS

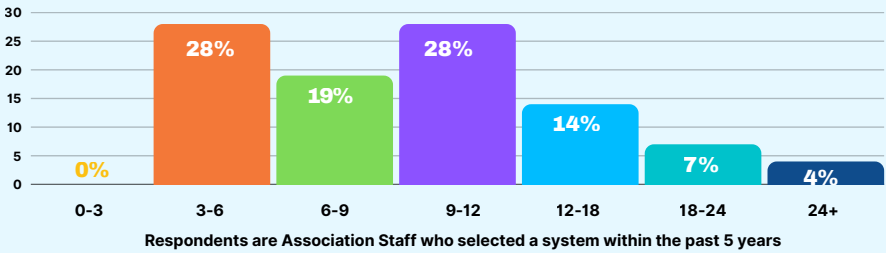
## Time to System Selection

In the most recent survey, fewer respondents selected a system in 3 to 6 months compared to previous surveys.

Fig.29

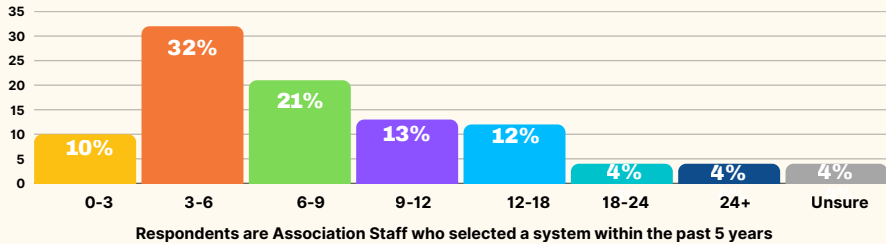
### 2021 Survey

Number of Months b/t deciding system was needed and selecting new system



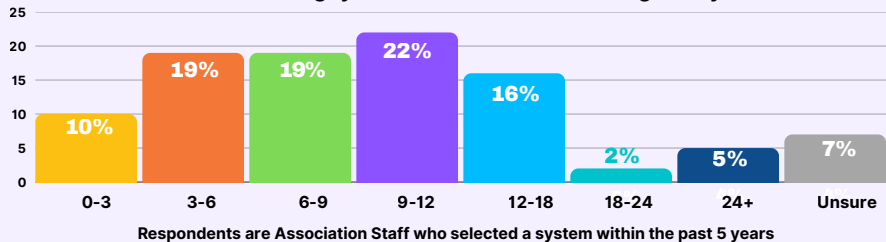
### 2023 Survey

Number of Months b/t deciding system was needed and selecting new system



### 2025 Survey

Number of Months b/t deciding system was needed and selecting new system



# 2021 VS 2023 VS 2025 DATA RESULTS

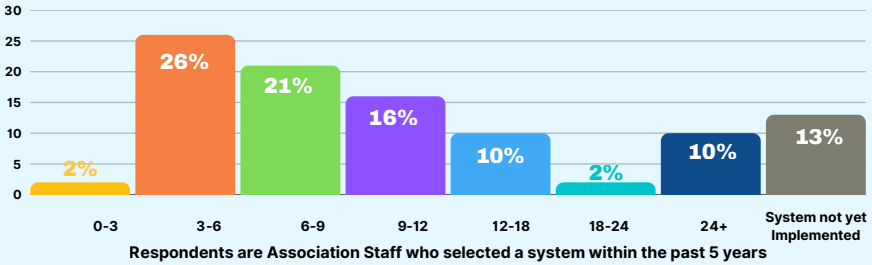
## Time to System Implementation

There was a significant increase in respondents implementing the new system in 3 or fewer months compared to the previous survey results.

Fig.30

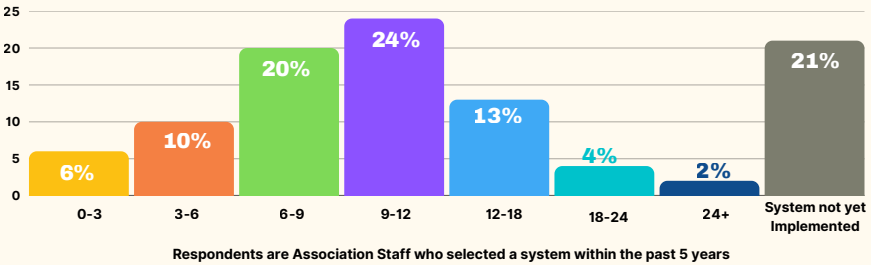
### 2021 Survey

Number of Months b/t system selection and system implementation



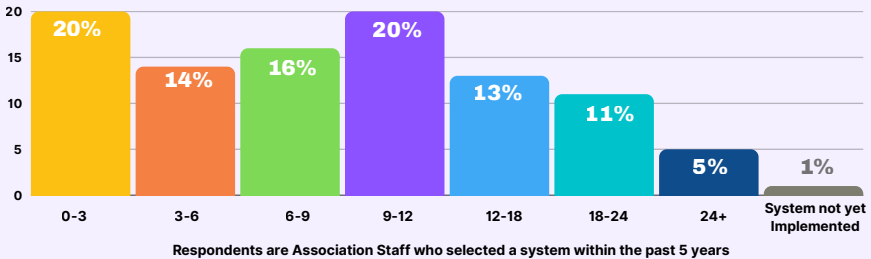
### 2023 Survey

Number of Months b/t system selection and system implementation



### 2025 Survey

Number of Months b/t system selection and system implementation



# 2021 VS 2023 VS 2025 DATA RESULTS

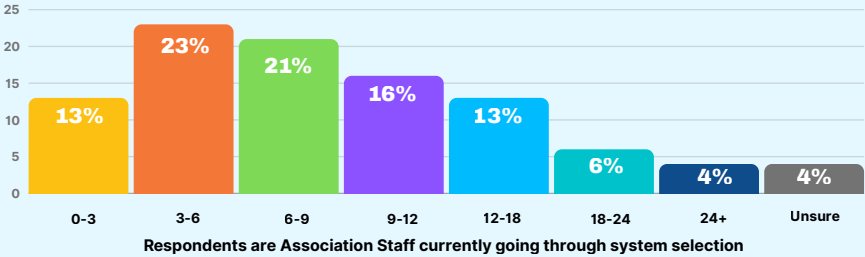
## Expected Time to System Selection - Not Yet Selected

There was a jump in the percentage of respondents expecting system selection to take fewer than 3 months compared to the prior survey results.

Fig.31

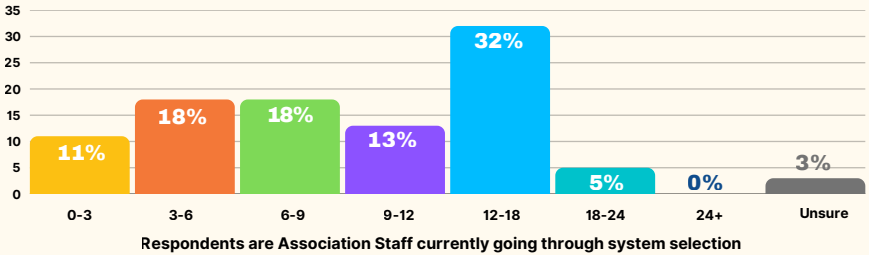
### 2021 Survey

Expected number of months for system selection



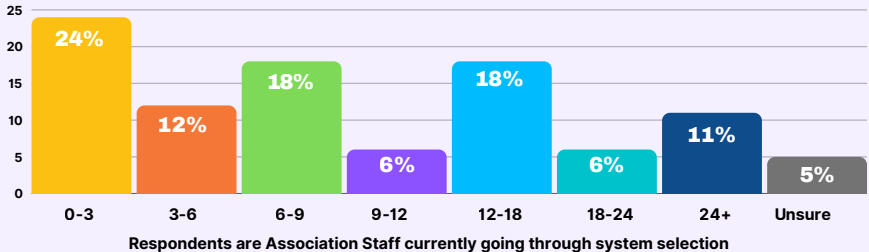
### 2023 Survey

Expected number of months for system selection



### 2025 Survey

Expected number of months for system selection



# 2021 VS 2023 VS 2025 DATA RESULTS

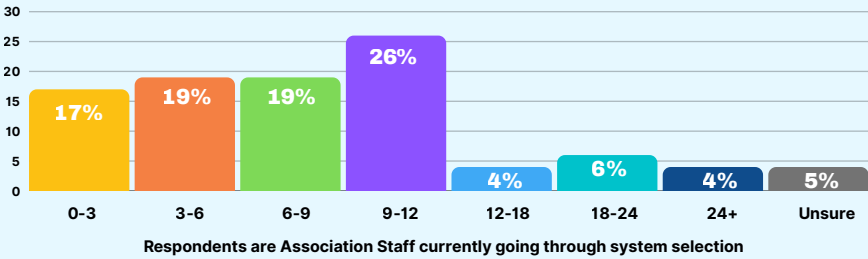
## Expected Time to System Implementation - Not Yet Selected

Fewer respondents expect to implement the new system in less than 3 months with a shift to expecting 12 or more months for the system implementation.

Fig.32

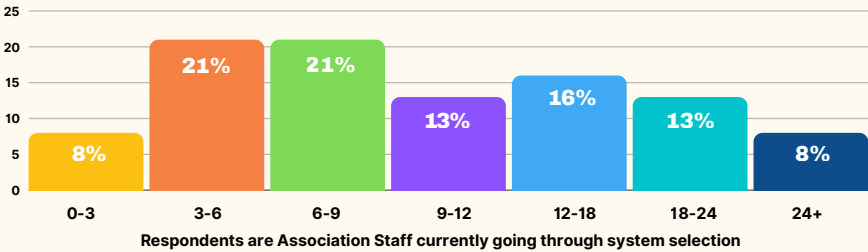
### 2021 Survey

Number of months expected b/t system selection and implementation



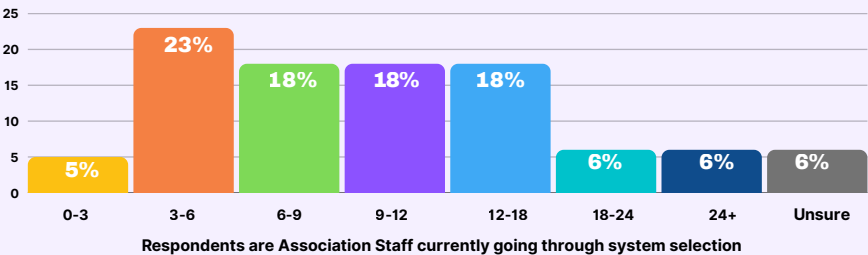
### 2023 Survey

Number of months expected b/t system selection and implementation



### 2025 Survey

Number of months expected b/t system selection and implementation



# 2021 VS 2023 VS 2025 DATA RESULTS

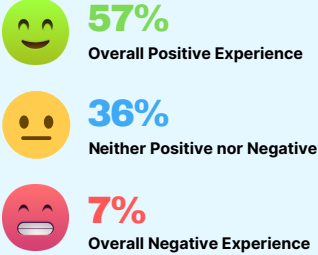
## Overall Impressions

The overall impressions of survey respondents going through system selection has been negative.

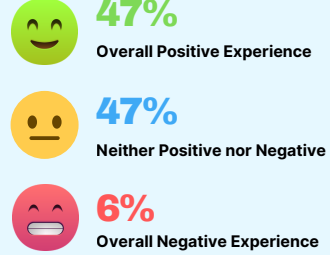
Fig.33

### 2021 Survey

Overall Impression of participants who selected system w/i past 5 years

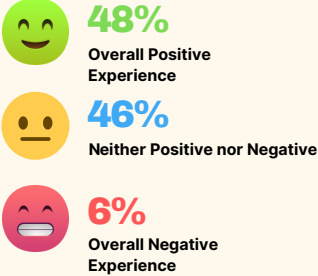


Overall Impressions of participants currently going through system selection

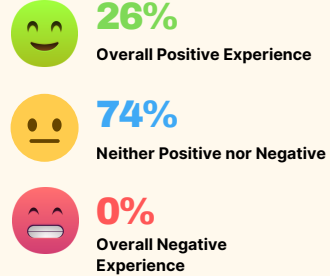


### 2023 Survey

Overall Impression of participants who selected system w/i past 5 years

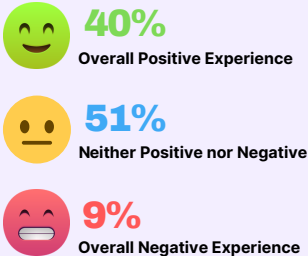


Overall Impressions of participants currently going through system selection

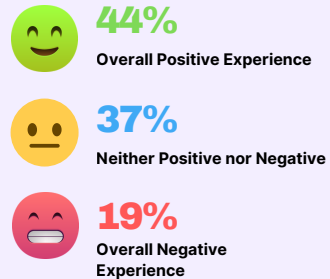


### 2025 Survey

Overall Impression of participants who selected system w/i past 5 years



Overall Impressions of participants currently going through system selection

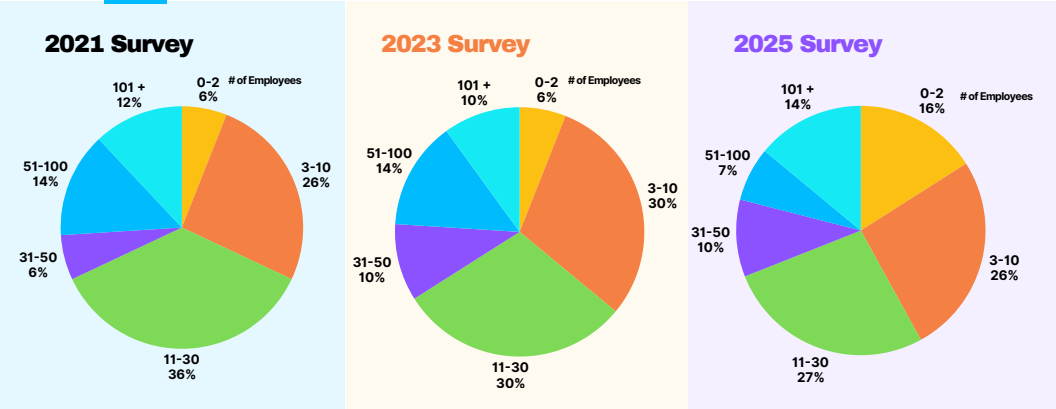


# 2021 VS 2023 VS 2025 DATA RESULTS

## Survey Respondents by Organization Size

More survey respondents were from smaller organizations compared to previous surveys.

Fig.34



## Time to Selection - By Organization Size

There was minimal indication of organization size impacting the time it took, or was expected to take, to select a system.

Fig.35

### 2021 Survey

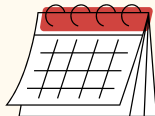
Most survey respondents from organizations with 11-30 employees selected a system in 12-18 months (37%). There were no other clear patterns for system selection timeline based on organization size.

### 2023 Survey

14% of respondents who selected a new system in 3-6 months were from organizations with 11-30 employees. The time to selection as reported by other respondents was spread across organization size.

### 2025 Survey

40% of respondents from organizations with 11-30 employees selected a new system in 9-12 months with implementation taking place within the 9-12 months after selection.



# RESOURCES



501Works has assembled a number of tools, resources and capabilities to help associations successfully navigate the challenges that come with large scale technology projects such as an AMS / CRM system. We are always updating these resources, so check back as you need advice. We are always here to help!

[501works.com](https://501works.com)



The CIO Hour is our monthly Webinar program where we tackle real-world technology problems that associations face. We feature industry experts and association executives in all roles from membership to events to technology. We offer a complimentary 30-minute meeting with James Marquis – our CIO – who has years of experience managing these types of projects. Feel free to contact us today and take advantage of this free advice!

[theciohour.com](https://theciohour.com)

**Plus, here are some highlights from past programs that will help you navigate your AMS journey.**



### **AMS/CRM Software Selection Survey - 2025**

In late 2023, we redid the survey to update our data and see how the landscape has changed. Be the first to hear a summary of new data results from the 2023 AMS/CRM System Selection Survey and be the first to access the report results at the February CIO Hour.

[theciohour.com/episodes/may-cio-hour/](https://theciohour.com/episodes/may-cio-hour/)



### **Avoiding the Integration Trap**

Modern associations frequently require systems to talk to each other to achieve their business needs. Integrations can provide data consistency between systems, cut down on staff work and data duplication and enhance your member experience. But system integrations can also be expensive, difficult to implement, and present ongoing operational challenges.

[theciohour.com/episodes/march-cio-hour/](https://theciohour.com/episodes/march-cio-hour/)



### **Managing Change in Association Projects**

When associations adopt innovative technology, it's not just the system that's changing; your staff needs to change too. But why is it so hard to initiate change in your organization especially when introducing digital transformation?

[theciohour.com/episodes/august-2024/](https://theciohour.com/episodes/august-2024/)



### **Remember the Member When Developing Your Tech**

This month we'll explore the world of member journey mapping and how to use it to make better technical decisions. A digital strategist and association executives share their "journey" through this process together to help create technology that better supports end user needs.

[theciohour.com/episodes/february-2023/](https://theciohour.com/episodes/february-2023/)



### **GIVE A REVIEW. READ REVIEWS.**

For years, associations have relied on Review My AMS to gain insight what other associations think of their AMS solutions. Utilizing a community driven approach, ReviewMyAMS provides you with a platform where you can share your own insights, learn from unbiased reviews, and make informed decisions about selecting your next AMS.

[reviewmyams.com](https://reviewmyams.com)

# RESOURCES

## 501WORKS™

### 501Works™

We are always developing new tools and content to help you navigate the AMS/CRM selection process, gather requirements, draft your RFP, and evaluate vendor responses. Below are a few highlights you may find useful during your AMS journey.

[501works.com](https://501works.com)



### HOW TO CREATE A WINNING SME TEAM

Here's 4 tips to help you create a winning Subject Matter Expert (SME) team.

[501works.com/resources/how-to-create-a-winning-sme-team-2/](https://501works.com/resources/how-to-create-a-winning-sme-team-2/)



### KEYS TO SME'S

Subject Matter Experts (SME's) make the project work.

[501works.com/resources/key-to-smes/](https://501works.com/resources/key-to-smes/)



### SOFTWARE JOURNEY

Good software projects are a journey – not a destination. Review and share this with your selection team.

[501works.com/resources/software-journey/](https://501works.com/resources/software-journey/)



### INTEGRATIONS

What you need to know in easy-to-understand terms.

[501works.com/resources/integrations/](https://501works.com/resources/integrations/)



### UNDERSTANDING TECHNOLOGY PROJECT FOUNDATIONS

How can you better position your team for success? Go beyond technology selection and make sure that other parts of your organization are ready to use your shiny new toy!

[501works.com/resources/understanding-technology-project-foundations/](https://501works.com/resources/understanding-technology-project-foundations/)



### GUIDE TO BUILDING A BETTER DATA STRATEGY

Data seems to be the buzz word in the association space these days, but mainstream organizations have been utilizing data to shape business decisions for the past 20 years. So why are associations so behind?

[501works.com/resources/guide-to-building-a-better-data-strategy/](https://501works.com/resources/guide-to-building-a-better-data-strategy/)



### AMS/CRM DEMO TRACKER

As you conduct your AMS/CRM search, you are likely to view basic demos from several vendors to see which appeal to you. Keeping all the solutions, features and your thoughts organized can be tough. Download our Demo Tracker to easily track the solutions you have seen and stay organized.

[501works.com/demo-tracker/](https://501works.com/demo-tracker/)

## WHAT COMES NEXT...?

The experiences gathered through surveys, interviews, and industry discussions are beginning to paint a more comprehensive picture of the AMS/CRM selection landscape. While every organization approaches system selection with unique goals and challenges, many common themes continue to surface around decision-making, stakeholder alignment, implementation readiness, and long-term project success.

What started as an effort to better understand individual experiences has evolved into a growing body of research that highlights both persistent challenges and emerging trends across the industry. Each new round of feedback adds valuable perspective, helping uncover not only where organizations struggle, but also where processes, partnerships, and outcomes can be strengthened.

The next phase of this work will continue to build on those findings through expanded surveys, focused interviews, and collaborative discussion groups with industry professionals and project stakeholders. These conversations provide an opportunity to move beyond high-level data and explore the practical realities, lessons learned, and strategic considerations that shape system selection and implementation efforts.

Additional insights, research findings, and analysis will be released as this work progresses. As participation continues to grow, so does the opportunity to deepen the industry's understanding of how organizations can approach these projects more effectively and collaboratively.

We are incredibly appreciative of everyone who has contributed their time, perspectives, and experiences to this research. Your ongoing participation is helping drive more informed conversations and better outcomes for organizations navigating complex technology decisions.



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[info@branchingknowledge.com](mailto:info@branchingknowledge.com)

**DELIVERING TECHNOLOGY THAT  
WORKS FOR YOUR ASSOCIATION**



### 501Works™ LLC

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- Software Selection & Implementation Services
- Customized Software Solutions and Integrations

[501works.com](http://501works.com)



### Mojo Middleware™

Easily integrate your different association software packages with over 40 available connectors.

[mojomiddleware.com](http://mojomiddleware.com)



### The League of Association Technologists

The League of Association Technologists is a community dedicated to helping associations make smarter technology decisions through peer learning, education, and industry collaboration.

[techleague.org](http://techleague.org)



### The CIO Hour

Not a tech type but have tech questions that you need answered? Join us for The CIO Hour – designed specifically for non-tech association staff to boost their IT-IQ. Ask your technology questions and get them answered by an experienced CIO and a crew of industry experts in a safe, casual environment.

[theciohour.com](http://theciohour.com)



### GIVE A REVIEW. READ REVIEWS.

Utilizing a community driven approach, ReviewMyAMS provides you with a platform where you can share your own insights, learn from unbiased reviews, and make informed decisions about selecting your next AMS.

[reviewmyams.com](http://reviewmyams.com)



# 2025

## 2025 AMS/CRM SYSTEM SELECTION SURVEY RESULTS

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