Evaluating a Membership Database

From a Customer Relationship Management (CRM) Perspective

Purchasing a new membership database or association management system is both exciting to explore new possibilities and daunting choosing which system best meets your needs and your budget.

Rent vs. Own

The biggest decision should be whether you want to purchase the database and physically house it or lease a database, also known as software as a service (SAAS). The total cost of ownership over a ten year period will generally be close for both. Leasing will be cheaper in the short term, buying will be cheaper long run (however, after 10-15 years an upgrade is generally necessary). The following are general rules; however, depending upon the vendor there are exceptions.

Purchase
- Larger upfront investment, lower year-over-year
- Generally pay for upgrades/enhancements
- Customizable, sometimes fully; however, you may sacrifice future upgrades/enhancements
- Database physically resides on site (may need internal IT resources); some will host the system at their facility for a fee
- Service contracts generally available, but not required
- Possibly own the source code

Lease
- Smaller upfront investment; service contract required
- Limited customization
- Upgrades/enhancements are frequent and usually free
- Database is hosted externally, eliminating the need for or freeing up internal IT resources

Features

It's a good idea to spend time with staff when considering your database needs as an organization. Look at staff functions and current business processes. Evaluate where you would like greater automation, which processes can be changed to suit database functionality versus which need database customization, and what type of information and reports you will need.

Following are some features to consider in your evaluation…

General

- ✓ User-friendly and intuitive navigation
- ✓ Customizable screens
- ✓ Customizable fields
- ✓ Contact management options (for recording interactions with customers/members)
- ✓ Selection of standard reports
- ✓ Ability to develop customizable reports
- ✓ Association management best practices built into workflow
- ✓ Flexible user security administration
- ✓ Training options
- ✓ Mobile device downloads

Membership

- ✓ CRM oriented (ability to capture a history of financial transactions as well as interests and preferences) to allow for meaningful, targeted customer interactions
- ✓ Invoicing flexibility (physical invoice and billing process)
- ✓ Handle tiered memberships
- ✓ Assign sales territories and track sales commissions by staff
- ✓ Build and track a sales prospect pipeline
- ✓ Manage relationships between employees/employers, parent/subsidiaries, etc.
- ✓ Track roles within the organization (primary contact, billing contact, president, etc.)
- ✓ Automated vs. manual processes for membership reminders, thank you's, etc.

Events/Sponsorships/Pledges

- ✓ Event set-up (sub-events, seminar tracks) and pricing flexibility
- ✓ Event attendance and sponsorship history and tracking
- ✓ Speaker details
- ✓ Customizable reports
- ✓ Handle recurring billing on multi-year pledges

Accounting

- ✓ Proprietary accounting package vs. integration with QuickBooks, Great Plains, etc.
- ✓ Export/import functionality
- ✓ Reporting flexibility

Marketing and Communications

- ✓ Integrated broadcast email
- ✓ Email tracking including open rates, read rates and link tracking

Legislative

- ✓ Ability to store legislators, committees, vote history
- ✓ Offer interface (API) to external databases such as Cap Wiz or Democracy Direct
- ✓ Custom fields for member district data (and how data will be populated/updated)

Website

- ✓ Options for standalone website or integrating web pages into existing site
- ✓ Hosting
- ✓ Design services
- ✓ Content management
- ✓ Customizable member area
- ✓ User friendliness/navigation of members only area
- ✓ Data driven content
- ✓ Payment processing and online event registrations

Cost of Ownership

- ✓ Conversion time
- ✓ Licensing, training and conversion costs
- ✓ Annual maintenance fees
- ✓ Hourly fee for programming and customization
- ✓ Annual web design/improvements
- ✓ Capacity for growth

Need help or advice?

Contact Kathy Woolever at Datalytics, Inc. 717-5765-0851 or kwoolever@datalyticsinc.com

We can help with business processes documentation and improvements, vendor evaluation, data conversion, staff training, report building and generally helping you maximize the value of your new or existing database.