



What software should your association invest in?

Is your association investing in software that reflects its level of growth?

OR

Is your association stuck with low cost tech that hinders its growth,

OR

Have you invested in solutions that you don't have the ability to manage?

This checklist outlines tech options that fit your association's level of development and position it for future growth.

	Small staff	Medium staff
# of members	50 to 1,000	1,000 to 5,000
# of staff	0-6	6-50
Volunteer status	Volunteer-led, volunteer driven	Volunteer led, staff driven
Sources of revenue	Membership dues, small events	Membership dues, multi-day conferences, sponsorship, advertising
Characteristics	<p>Executive Director managing communications, fundraising, governance</p> <p>Volunteer make key decisions on operations and strategic planning</p> <p>Staff are hired for multiple functions</p> <p>Outsourcing is very careful vetted according to resources</p> <p>Partner with complementary associations to create events, share costs, raise awareness and conduct advocacy</p>	<p>Board members move away from direct involvement, into strategic planning and roles, leaving staff to fulfill day to day tasks</p> <p>Moving away from day to day management to focusing on growth and organization's role in the big picture</p> <p>Want to be seen as industry leader</p> <p>Members are paying more, so demand more</p> <p>Increased program offerings</p> <p>More need to emphasize membership benefits/value and ROI of membership</p> <p>Moving towards non dues revenue</p> <p>More competition with the for profit sector and bigger associations</p>

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Challenges at this stage	<p>Increase efficiency of day to day operations</p> <p>Maintain membership numbers</p> <p>Define and showcase value to members and potential members</p> <p>Maintain / increase revenue</p> <p>More engagement with and between members</p>	<p>Need to focus on a higher level of member engagement: onboarding, better experience, more customized experience</p> <p>Still understaffed, however multiple hats are focused within their field of expertise/ department</p> <p>Retention rates dropping as organization moves away from the grassroots</p> <p>Measurement: how to know what activities drive recruitment, engagement and retention</p> <p>Attracting and engaging with younger members</p> <p>Moving towards becoming the industry's primary information source</p>

	Small staff	Medium staff
<p>Technology you need at this stage of growth</p>	<p>Website: out of the box solutions for which your association needs little-to-no tech/coding experience.</p> <p>Events: software to easily create, manage and promote events with online registration, attendance tracking, and payment processing.</p> <p>Payments: automate membership renewals, registrations and payments.</p> <p>Database: maintain detailed member, volunteer, sponsor and admin records in an easy-to-search and filtered online database.</p> <p>Emails: send professional newsletter and email communications</p>	<p>Website: Use a content management system (preferably integrated with association management software or CRM)</p> <p>Database: CRM or AMS that provides an overview of membership. Should include financial management, member directory, communities/portals, website management, email marketing, measurements, analytics</p> <p>Online community software</p> <p>Analytics support</p> <p>Emails: Software integrated with membership database, allow for automation of email messages, segmentation of membership types, integration with website, social media and analytics</p> <p>Conference management solutions such as payment, registration, integrated with database, and marketing automation</p>

	Small staff	Medium staff
Technology you need at this stage of growth	<p>Member Login: allow members to login to your website to access exclusive resources, personal accounts and internal events.</p> <p>Integration between all tools</p>	<p>Webinar/online meeting software</p> <p>Mobile apps for conferences and customized services</p> <p>Learning management software for education modules</p>

Need more information?

Visit TAGb.ca for more tips, resources and training on choosing the right software for your small or medium sized association