

## AMS Implementation Quick Tips



- The makeup of implementation team is key to the success of the AMS implementation project.
- Engage in a detailed study with the vendor and clearly understand how the system will conform to your functional specifications.
- Stay Baseline! The rule is simple: stay within the baseline system whenever a change in business process will suffice. Remember the 80% Rule – if the system handles 80% of all instances, do not modify for the remaining 20%.
- Communication is King. Keeping everyone on staff aware of the project status is important in keeping ongoing momentum and enthusiasm.
- Continually assess the progress of the project against expectations and goals and find solutions to bridge any gaps.
- Manage the Project Plan rigorously! Project creep translates directly to project cost overruns.
- Be judicious about what data/information you convert from your legacy database. Financial information is extremely costly and oftentimes unnecessary. Consider converting history in flat files.
- Test and retest your converted data - it is the first thing your members will see if you mess it up!
- In an AMS/CRM implementation, you can invest the time and money to make sure you have everything set before you Go Live or you can scramble to fix the multiple problems that arise afterwards. It's much easier and cost effective if you anticipate and fix any issues during the implementation phase, so that Go Live is nothing more than flipping the switch from one system to the next.
- Plan for more training than the vendors tell you is necessary. AMS/CRM applications take some learning. Don't frustrate and shortchange staff by not providing ample training.
- Training does not end at GO Live! Your staff will probably use 30%-40% of the system after six months. Develop an ongoing training budget to take full advantage of the functionality of your AMS/CRM.
- The AMS/CRM vendor is not the enemy – the vendor is your Partner and will continue to be for many years.
- Be sure to find ways to make this project fun with little parties along the way. It is a lot of work in addition to the normal workload. Keep everyone inspired.