BEFORE YOU REPLACE YOUR MEMBERSHIP SYSTEM

9 questions to answer first

A new membership system is one of the biggest technology decisions an association makes. Most of what decides whether it works is settled before the first demo. These are the questions worth answering while you still have the time to answer them well.

01 What problem are we actually solving?

02 What does each team need, in its own words?

03 What do we really pay today?

04 Which member record is the true one?

05 Who holds the knowledge of how it works?

06 What comes across, and what stays behind?

07 Could we fix what we have instead?

08 What will the board need to say yes?

09 How will we know it worked?

For
Anyone planning a new membership system

Time to read
About 12 minutes

Use it
With your team, before any vendor call

WHY WE WROTE THIS

The decision is usually made before anyone notices it being made

Associations rarely choose the wrong membership system on purpose. They choose it in a hurry, a few weeks before a renewal, with one vendor's demo as the only reference point.

By the time the demos start, the important choices have already been made by default: which problems the new system is meant to solve, whose needs count, what the current setup really costs, and what success will look like. When those are left unanswered, the new system inherits the old system's problems, at a higher price.

Over more than 80 Salesforce implementations for associations and nonprofits, the pattern we see is consistent. The projects that go well are the ones where leadership could answer a short list of plain questions before talking to anyone selling anything. This guide is that list.

None of the questions needs a consultant to answer. They need an honest hour with your team. If you find you cannot answer some of them yet, that is the most useful thing this guide can tell you.

Sunil Dua
Kloudserv

How to use it

Read it with your team. For each question, decide whether you can answer it today, partly, or not yet. The self-check on the last page keeps score.

Who it is for

Anyone at an association planning a change of membership system, or wondering whether they should.

What it is not

A sales pitch for any system. Several of the questions may lead you to keep the one you have.

A useful rule of thumb. If a question below makes the room go quiet, it is not a reason to delay the project. It is the work the project should start with.

01 What problem are we actually solving?

"The system is old" is a feeling, not a problem. The problems are specific: renewals that lapse without anyone noticing, a board report that takes three days, members who cannot update their own details. A new system fixes only the problems it was chosen to fix.

SIGNS YOU ARE NOT READY

- The case for change is mostly frustration
- Each person describes a different problem
- The vendor's feature list is shaping the goals

A GOOD ANSWER LOOKS LIKE

Three to five problems, written down, each with who it affects and what it costs today.

02 What does each team need, in its own words?

Membership, events, finance, communications and education all touch the member record, and each needs something different from it. Requirements gathered only from leadership miss the daily work; requirements gathered only from staff miss the strategy.

SIGNS YOU ARE NOT READY

- Requirements came from one or two people
- Finance and events were never asked
- Nobody has ranked what matters most

A GOOD ANSWER LOOKS LIKE

A short list per team, in their language, ranked by leadership into must have, important and nice to have.

03 What do we really pay today?

The licence is usually the smallest part. The rest is staff time: exporting lists, typing the same information into two places, rebuilding reports by hand, plus the add-ons and tools bought around the edges. If the comparison is only licence against licence, the real cost is never weighed.

SIGNS YOU ARE NOT READY

- No single list of every tool you pay for
- Staff time is not counted at all
- Renewal dates are not known in advance

A GOOD ANSWER LOOKS LIKE

Every system, its annual cost, its owner and its renewal date, plus a rough count of hours spent moving information between them.

04 Where does member information live, and which record is the true one?

In most associations the same member exists in the membership system, the email platform, the event tool and at least one spreadsheet. When they disagree, someone decides from memory. A new system needs one record that everything else reads from, and an agreed rule for who keeps it right.

SIGNS YOU ARE NOT READY

- Lists are exported "every few weeks"
- Lapsed members still receive member offers
- Nobody owns the quality of the data

A GOOD ANSWER LOOKS LIKE

A simple picture of how information moves today, showing where it is typed in twice and who owns the main record.

05 Who holds the knowledge of how it all works?

In many associations one person keeps renewals, continuing education or reporting running, and the procedure lives in their head. A system change puts that knowledge under the most pressure at exactly the moment you need it most.

SIGNS YOU ARE NOT READY

- "Ask Maria" is the procedure
- Nothing is written down for renewals
- A two-week absence would stall something

A GOOD ANSWER LOOKS LIKE

The critical processes written down before anything changes, so the knowledge survives both the project and any staffing change.

06 What has to come across, and what can we leave behind?

Years of member history, event attendance, credits and giving records feel essential until someone asks who uses them. Deciding early what must come across, what can be archived and what needs cleaning first saves weeks of project time and a good share of the budget.

SIGNS YOU ARE NOT READY

- The plan is to "bring everything"
- Duplicates and old records were never counted
- History lives in a system nobody can open

A GOOD ANSWER LOOKS LIKE

An agreed list of what moves, what is archived and what is cleaned first, decided by the people who use it.

07 Could we fix what we have instead?

Sometimes the right answer is to stay and fix three things: switch on features you already pay for, retire the side spreadsheets, connect the email tool properly. Vendors rarely make that case, because there is nothing in it for them. Your decision should consider it seriously.

SIGNS YOU ARE NOT READY

- Staying was never costed as an option
- Unused features were never reviewed
- The decision is framed as which vendor, not whether

A GOOD ANSWER LOOKS LIKE

At least two paths weighed side by side, including keeping the current system, with cost and limits for each.

08 What will the board need to say yes?

Boards fund decisions they understand: what is wrong today, what it costs to leave it, what the options are, and what the first, smaller commitment would be. A request for one large sum with a vendor's slide deck attached is the hardest thing to approve.

SIGNS YOU ARE NOT READY

- The budget is one number with no stages
- Risks are not named
- The board hears about it at the funding vote

A GOOD ANSWER LOOKS LIKE

A short decision paper and a plan in stages, each stage useful on its own, so the board approves a first step, not a leap.

09 How will we know it worked?

If success is not defined before the project, it gets defined afterwards as "it went live". A year later the same problems are back under a new logo. Decide now what will be measurably different, and by when.

SIGNS YOU ARE NOT READY

- Success means "launched on time"
- No baseline was measured
- Nobody is named to own the result

A GOOD ANSWER LOOKS LIKE

Three or four measures with today's number beside them: renewal lapses, hours to produce the board report, member self-service use.

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SELF-CHECK

Where does your association stand?

Tick one box per question with your leadership team.

QUESTION	YES	PARTLY	NOT YET
1. We have written down the three to five problems we are solving	☐	☐	☐
2. Every team has said what it needs, and leadership has ranked it	☐	☐	☐
3. We know every system we pay for, its cost, owner and renewal date	☐	☐	☐
4. We know where member information lives and which record is the true one	☐	☐	☐
5. Our critical processes are written down, not held by one person	☐	☐	☐
6. We have agreed what comes across, what is archived and what is cleaned	☐	☐	☐
7. We have costed staying and fixing, not only moving	☐	☐	☐
8. The board has a decision paper and a plan in stages	☐	☐	☐
9. We have three or four measures of success, with today's numbers	☐	☐	☐

Reading your score

- **Mostly yes:** you are ready to talk to vendors, and you will get better quotes than most.
- **Mostly partly:** you are close. A few weeks of focused work now will save months later.
- **Mostly not yet:** that is normal, and it is the right time to find out, before money is committed.

IF YOU WANT HELP ANSWERING THEM

The Digital Readiness Blueprint

In four to six weeks, for a fixed fee, we answer all nine with you: we talk to each team, list every system and its cost, weigh the options, including staying, and give you a plan in stages with a short deck for your board. Any implementation partner can quote from it.

Talk it through with us