



Established 1993
Serving social mission organizations
with integrated technology services
you can trust.

www.citidc.com



ISOC AMS/CRM Requirements Analysis Project

Project Summary & Trade-off
Analysis Discussion
June 2008



Project Activities To Date

- April 2008
 - Project Kick-off & Initial Discovery Process
 - Drafted AMS/CRM Statement of Requirements
- May 2008
 - Formed Chapter Steering Committee
 - Drafted AMS/CRM Statement of Requirements
 - Conducted Pre-RFP Software Demonstrations
- June 2008
 - RFP Planning



Established 1993
Serving social mission organizations
with integrated technology services
you can trust.

www.citidc.com



Project Activities:

AMS Project Management Team

The AMS/CRM Project Management Team is responsible for managing all aspects of the AMS/CRM project. Phase 1 of the project focuses the team on developing requirements and releasing an RFP for vendor response. During subsequent phases, the project team will drive the software selection and implementation processes.

Members

- Leslie Daigle, Chief Internet Technology Officer
- Hans Peter Dittler, Chapter Steering Committee Lead
- Drew Dvorshak, Senior Manager, Organizational Membership
- Peter Godwin, Director, Information Technology
- Raymond Hearn, Project Manager, Community IT Innovators
- Greg Kapfer, Chief Financial Officer
- Anne Lord, Senior Manager, Chapter & Individual Membership
- Lucy Lynch, Director, Technical Projects
- Karen Rose, Education
- Gerard Ross, Senior Manager, Communications
- Dan Shenk-Evans, Senior Consultant, Community IT Innovators
- Rajnesh Singh, Manager, Pacific Bureau
- Lynn St. Amour, Chief Executive Officer - **AMS Project Team Chair**
- Sabrina Wilmot, Manager, Chapter & Individual Membership



www.citidc.com

Established 1993
Serving social mission organizations
with integrated technology services
you can trust.



Project Activities: Chapter Steering Committee

The ISOC Chapter Steering Committee plays a key role in defining Chapter membership requirements for the ISOC AMS. The steering committee plays a key role in evaluating RFP responses, communicating project updates to the Chapters as well as testing and localizing the Chapter membership components of the AMS as they are developed and implemented. This information is then fed to the AMS Project Team via the **CSC Leader (CSCL)**.

Members

- Hans Peter Dittler, ISOC Germany, **(CSCL)**
- Sivasubramanian Muthusamy, ISOC India Chennai
- Eduardo Diaz, ISOC Puerto Rico
- Franck Martin, PICISOC
- Marcin Cieslak, ISOC Poland
- Carlos Vera, ISOC Ecuador
- Rudi Vansnick, ISOC Belgium
- Jose F. Callo Romero, ISOC Peru
- Joly MacFie, ISOC NY
- Khaled Koubaa, ISOC Tunisia
- Cheryl Langdon-Orr, ISOC Australia

Accomplishments to Date

- Conducted three all-CSC Marratech meetings
- Provided written feedback to draft statement of requirements
- Conducted numerous working group meetings to draft initial conceptual design for individual membership management requirements
- Planning broader chapter outreach activities



www.citidc.com

Established in 1998
Serving social mission organizations
with integrated technology services
you can trust.



Project Activities:

Pre-RFP Software Demonstrations

- These AMS/CRM products were strategically selected to represent classes of potential solutions for ISOC.



Industry leading high-end commercial off-the-shelf (COTS) AMS designed for large associations.



Free open source software used to develop international chapter based membership management systems for Amnesty International and Democrats Abroad.



Mid-range COTS AMS designed for small to mid-size associations. While ISOC uses v1, v12 appears to address key requirements, and was reviewed as a matter of due diligence.



SugarCRM Professional Edition exemplifies an open source CRM application backed by a professional development and support company.



Established 1993
Serving social mission organizations
with integrated technology services
you can trust.

www.citidc.com



Critical Requirements & Trade-off Decisions

- Several critical requirement areas will be the primary areas of focus during the RFP process. We expect key product differentiations to emerge in these areas, and they in turn are dependent upon trade-offs listed below.
 - Chapter Self-Management
 - Online Members-only Portal
 - Internationalization
 - Extensibility, Accessibility, & Flexibility
 - Constituent (Stakeholder) Relationship Management (CRM)
 - Single Sign-on & Data Extraction Capabilities
- In addition to these critical requirement areas, the final software selection will be determined in large part by the trade-off decisions made during the evaluation. These include:
 - Extensibility
 - Focus of Financial Investment
 - Expectations: Basic Membership or Broad Collaboration System



Established 1993
Serving social mission organizations
with integrated technology services
you can trust.

www.citidc.com



Trade-off #1: Extensibility

Open Source

Build the AMS/CRM on an open source platform

Benefits

- Lower software license costs
- Ability to modify source code to fit evolving needs

Risks

- Modifying source code may complicate future upgrades
- Significant investment to build internal software development capability

Or

Open Standards

Build the AMS/CRM to be extended through the use of open standard based APIs.

Benefits

- New features added without potentially disturbing core functionality
- Lower learning curve as intimate knowledge of core functionality not required

Risks

- APIs may be limited in scope and/or difficult/costly to implement



Established 1993
Serving social mission organizations
with integrated technology services
you can trust.

www.citidc.com



Trade-off #2: Focus of Financial Investment

AMS

Implement a mature off-the-shelf AMS that scales to meet the foreseeable needs of all stakeholders.

Benefits

- Immediate availability of advanced association/stakeholder management & collaboration features
- Vendor frequently upgrades AMS with “leading-edge” technologies

Risks

- Initial customization & configuration costs may still be substantial
- Some off-the-shelf AMS functionality may never be used

Or

CRM

Implement a CRM system with less robust membership/stakeholder management functionality, and customize it to meet evolving needs over time.

Benefits

- Pay as you go for functionality backed by clear business needs
- System is simpler, as evolving functionality is tailored to ISOC’s exact specifications

Risks

- Early CRM release(s) fail to meet stakeholder expectations
- Complexity of long term software development initiatives lead to overruns



Established 1993
Serving social mission organizations
with integrated technology services
you can trust.

www.citidc.com



Trade-off #3 – Expectations: Basic Membership or Broad Collaboration

Basic Membership Management Functionality

Chapter functionality is limited to core membership management features (joins/renewals/drops, & querying/exporting membership lists)

Benefits

- Decreased IT training and ramp-up time for new chapter officials
- Decreased IT support & maintenance costs
- Launch of chapter portal is expedited

Risks

- Large chapters that want more functionality may have to acquire their own supplemental database resources
- Some large chapters opt out of global AMS/CRM preferring their own single integrated database
- Increased IT costs to integrate with a variety of chapter databases

Or

Broad Management & Collaboration Functionality

ISOC makes a long-term commitment to ongoing development of broad management & collaboration functionality as ISOC articulates evolving needs.

Benefits

- Each release of new functionality expands the operational capacity of ISOC's stakeholders
- More chapters are drawn to use the AMS/CRM as it's tailored to meet their evolving needs

Risks

- Higher TCO resulting from iterative requirements analysis, software development, and support costs.
- It proves too costly/difficult to develop a universal chapter management system, and some chapters opt out in spite of ISOC's ongoing commitment and investment.

Next Steps: AMS/CRM RFP Timeline



Established 1993
Serving social mission organizations
with integrated technology services
you can trust.

www.citidc.com

