



Creating an Effective Internal EMS Team

Presented by: Ryan Rejda, iMIS Consultant
Association Technology Solutions



ABOUT ATS

- Serving iMIS community since 1995
- Full-service Authorized iMIS Solution Provider (AiSP)
- Application development to extend the functionality of iMIS
- ASI's Client Sales Leader of the Year and Chairman Circle for 2020



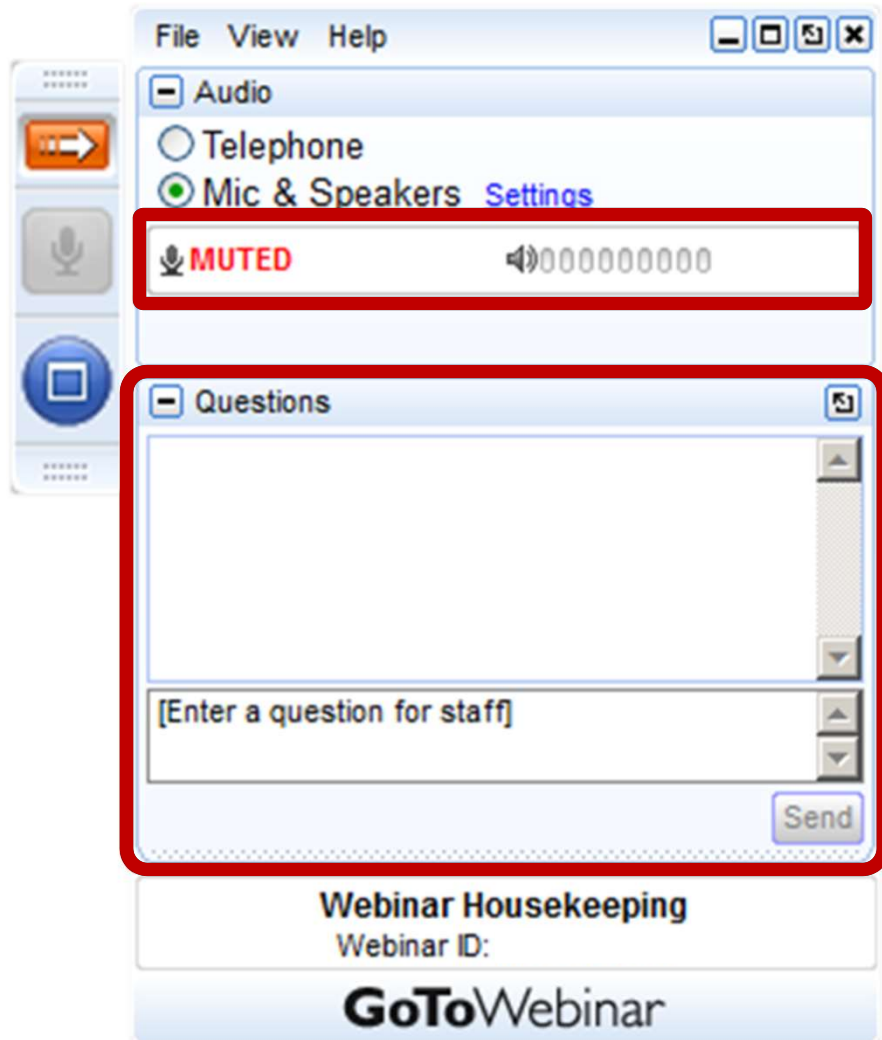


HOSTED BY



Ryan Rejda
iMIS Consultant
Association Technology Solutions
rrejda@atsol.org





- Attendees are muted to reduce background noise
- Remember to ask questions via the **Questions** panel
- Questions will be answered during Q&A after presentation is complete



WHY FORM AN EMS TEAM?



Decision makers when it comes to iMIS





WHO SHOULD BE ON THE TEAM?

A member of leadership

iMIS power users

Cover functional areas of iMIS



- Documenting current iMIS setup
- Project management of EMS upgrade
- Communication
- Testing



DOCUMENTATION

- Current iMIS setup
- What is EMS getting rid of and staff impact
- 3rd party integrations





PROJECT MANAGEMENT

- EMS Project tasks
 - Start with the ASI testing list and build out
- Assign a project lead





ASI HELP SITE

- https://help.imis.com/enterprise/upgrading_to_imis_ems/testing_imis_ems/testing_imis_ems.htm

Suggested testing and go-live timeline					
	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
WEEK 1	<ul style="list-style-type: none"> • Ensure important EMS settings are configured: Settings configuration • Complete the Testing checklist • Global Payments gateway (North America and Asia Pacific only) • Create a top 10-15 list of the processes you regularly perform in iMIS today. Can you complete these same processes in the test site? 				
WEEK 2	<ul style="list-style-type: none"> • Membership testing • Fundraising testing 				
WEEK 3	Check-in on testing progress & continue testing	Finance testing		Queries and reports testing	Commerce testing
WEEK 4	Websites and account pages testing		Events testing		Communications testing
WEEK 5	<ul style="list-style-type: none"> • Complete remaining testing • Partners and AiSPs working with clients or testing on-behalf-of clients: Complete, sign, and send the iMIS EMS Checklist to ASI Cloud Services 				
WEEK 6	Final check-in on testing progress Pre-upgrade checklist	Wrap-up testing and prepare for go-live			
WEEK 7	Upgrade to iMIS EMS + Complete Post-upgrade checklist Post-upgrade support begins				
WEEK 8	Continue post-upgrade support				Post-upgrade support





COMMUNICATION AND TESTING

- Share your project plan with the organization
- Meet frequently even if it is just a quick touch base
- There can never be enough testing





IN CLOSING

Common Characteristics of Success and Stress

1. Success

1. Stakeholder buy in
2. Named PM/Project Owner @ client
3. Realistic timeline

2. Stress

1. Not gathering requirements early on
2. Poor Internal Client Communication
3. Client not testing





QUESTIONS & ANSWERS



Ryan Rejda
iMIS Consultant
Association Technology Solutions
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Email: info@atsol.org

Online: <http://www.atsol.org>

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