Overview

- The UBC Alma Mater Society currently employs Sugar CRM Software
- Sugar creates huge inefficiencies for SAC
- Sugar make no use of computerization techniques for improving performance of services
- Three systems were evaluated as viable alternatives:
  - Community
  - CollegiateLink
  - OrgSync

New Capabilities

Consultations

Alternatives

Cost

Recommendation
Required Capabilities

- Ability to Maintain and Record Club Information
- Maintain and Edit a Directory of Clubs
- Ability to Search Through Directory for Clubs
- Archiving all Club Information
- Club Waiver Forms and Surveys (Admin Perspective)
- Messaging System Connected to E-mail
- Access to Names of Current Club Members and Club Standing
- Event Hosting
- Waivers to Sign Members Up (User Perspective)
Current Processes

MAIN PITFALLS:

➢ Sugar prevents proper computerization
➢ No E-mailing capability
➢ Poor Club Directory and Search System
➢ No online waivers
➢ Difficult to Update System

Sugar CRM only acts as a directory, and a poor one at that!
Added Computerized Capabilities

- CWL Login
- Safe Data Storage
- User-Friendly Interface
- Ability to Pay for Membership and Events Electronically
• Shibboleth is a unique Single Sign-on system in that it allows the ability to provide Single Sign-On support outside of a user’s organization while still protecting their privacy.
Safe Data Storage

- AMS must gain consent to collect and use personal information, this is implicitly given upon joining a club
- AMS does not need to allow individuals to opt out
- AMS does not need consent to store personal information
- Assurances should be made with vendor to outline strength of servers
- AMS should probably notify students of such storage practices out of good faith
Friendly User-Interface

Overview
New Capabilities
Consultations
Alternatives
Cost
Recommendation
Online Payment System

PayPal

wePAY
Club Consultations

- 4 Focus Groups
- 34 Clubs Attended in Total
- Positive and Safe Space
Questions Asked

- Could you please disclose your role within your club?
- How do you feel about visiting the AMS SAC offices to manage your clubs?
- As a club executive when beginning the fiscal club year what is the transition period like?
- How do you feel about the current system used to register club members, whereby you sign paper waiver forms?
- How has your experience with holding events and collecting payments for events been? Have you used Rezgo (if so ask for thoughts)?
- Are you aware of whom your club members are, and describe the processes associated with tracking and communicating with them
- Would you be interested in an online system where clubs would be able to use electronic waiver forms, advertise and create events, have access to member directory, have access to club history and pay for memberships and events?
Main Concerns

- SAC Offices Slightly Intimidating
- Lack of Communication
- Huge Waiver Issue
- Difficult Having Accountability for Attendance to Events
- Transition Period Difficult, Especially with Consolidating Previous Years Information
- OVERALL: Want a computerized Clubs Management System
Alternatives

- CollegiateLink
- OrgSync
- Symplicity
Interface

Community
- Unfriendly User-Interface
- Poor Widget Responsiveness
- Poor Throughput Speed

CollegiateLink
- Very User-Friendly
- Good Widget Responsiveness
- Good Throughput Speed

OrgSync
- Very User-Friendly
- Good Widget Responsiveness
- Good Throughput Speed
Security

- **Community** - Servers hosted in Canada
- **CollegiateLink** - Servers hosted in Canada
- **OrgSync** - Servers hosted in USA (should not be an issue)
API (Application Program Interface)

<table>
<thead>
<tr>
<th>Tool</th>
<th>Description</th>
<th>Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community</td>
<td>Does not come with an API</td>
<td>✗</td>
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<tr>
<td>CollegiateLink</td>
<td>Comes with an API</td>
<td>✓</td>
</tr>
<tr>
<td>OrgSync</td>
<td>Comes with an API</td>
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</table>
Online Payment

- **Community**
  - Ability to integrate with vendor

- **CollegiateLink**
  - Cannot integrate with vendor

- **OrgSync**
  - Ability to integrate with vendor
Further Analysis

CWL Login
Analytics (added events)
Personalization and Customization
Reputation and History
Ability to Maintain and Record Club Information
Maintain and Edit a Directory of Clubs
Ability to Search Through Directory for Clubs

Archiving all Club Information
Club Waiver Forms and Surveys (Admin Perspective)
Messaging System Connected to E-mail
Access to Names of Current Club Members and Club Standing
Event Hosting
Waivers to Sign Members Up (User Perspective)
## Price

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<th>Contract Length</th>
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Recommendation

- After careful review and consideration I believe that OrgSync should be implemented because:
  - It covers every minimum capability requirement excellently
  - It provides an extremely user-friendly experience that students will be more receptive to
  - It has the capabilities to be scaled and involve other silos of the AMS
  - It has received positive reviews from schools that have implemented it
  - It offers the most personalized relationship
Recommendation

➤ A big issue that is always raised in implementations is experience

➤ With over 400 institutions worldwide already using the system, OrgSync is very much experienced

➤ They have a 95% retention rate

➤ General enthusiasm towards campus partners

➤ [http://www.orgsync.com/testimonials](http://www.orgsync.com/testimonials)