Board Report – Current Status on Membership Software

Hugh R. Harris, Membership Administrator

Current Position

We are still using the NEONCRM software that we have had since 2017. It isn't very satisfactory – but it is inexpensive. We have two common problems that we've identified:

1. The software occasionally (less than 1% of the time) pulls an address and scrambles it. It will normally keep the lines complete but mixes them up -it will put the street address from one member and the city and state from another member in the same address block.
2. When tasked to pull all Members it drops some members – again it is less than 1% but it drives me crazy since I don't know how to find the missing items until the member complains that they didn't get something.

Other than that, and the fact that they refuse to allow us to use and integrate with PayPal, it is working. The lack of integration costs time – I must manually download the data from PayPal and then manually enter the items to Neon but that doesn't cost the Society anything since I'm a volunteer.

Going Forward

I still think we'll need to build an on-line system that works for us. The trouble is cost. We can still purchase the use of a system like "SalesForce", this requires us to link up with one of their 'Applications Specialist' companies who will do the building and adaptation to fit the interface to our needs. The trouble is both up-front and annual cost. The adaptation cost will probably be at least $25,000 to $35,000 and then the annual fees will run about $15,000 - $20,000. We currently pay Neon about $8,000 per year with the recent adder that they applied because we won't use their "NEONPAY" system for credit card processing.

We have an offer from our Web Specialist to help us build a web-based system by working with an applications company that uses the common web software. Initially I thought that this could be done for about $10,000 but now I have been made aware that that was a gross underestimate, and the cost will be more like the start-up cost for "SalesForce". However, the running cost would be no higher than what we pay now.

As you are all aware, I have had some personal problems over the past few months. I think those are now behind me, but I still operate under some restrictions and while it hasn't hurt our renewal cycle operations it has meant that I haven't kept abreast of the software

marketplace. I now understand that there may be some additional options available to us and I'll try to get a handle on those over the next few weeks.

I apologize for not having a better summary ready for you.

Hugh R. Harris,
Membership Administrator, NRHS.

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ADDENDUM TO THE MAY 2022 BOARD REPORT ON MEMBERSHIP
05/19/2022

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I have found another three companies that are in the CRM Software market. At least two of them are based in the US. I will be contacting Trishah Wooley, who, with Dawn Holmgren, built our current website. As far as the Membership aspects of this are concerned it has been working very well. I want to use her as a Consultant since my IT skills are very out of date – plus we need someone who is likely to be available for some years into the future.

I have priced our needs with one of the three companies. It looks like a start-up price of approximately $5,000 plus Ms. Wooley's Consulting fee and a monthly cost between $600 and $800. The company that I talked with will allow any credit processor to access their system, I specifically asked if they would accept PayPal and they do.

I will be in contact with Dawn and Trishah next week and will try to develop a more detailed proposal by the end of May. Once I have that done I will have to ask the Board for approval to spend the funds needed to adapt the CRM software to our application.

I apologize for not having this done in time for the California meeting, but I have had a series of personal problems that have occupied much of my time. I hope they are largely behind me now, so I expect to be able to get to this work.

Hugh R. Harris,
Membership Administrator, NRHS.