

How to Choose the Right Membership Management Software for Your Organization

Expert advice to quickly compare the top 12 solutions



This Guide Will Help You If...

...if you're a small to mid-sized nonprofit, association, or club that is currently using Excel, Mailchimp, Eventbrite, WordPress, or a combination of any other software programs (or maybe none at all) that requires a lot of time and coordination to run your organization.

...or, if you're already using Membership Management Software, but you're not happy with it — maybe it's too expensive, or doesn't have all the features you want.

Either way, you've come to the right place.

This guide will quickly help you find the right solution for your organization — one that:

- saves you dozens of hours a week in administrative work
- can modernize the way you run and market your organization
- fits your budget (and saves you money)
- has 90-100% of the features you need to run and grow your organization
- is a do-it-yourself solution you don't need to be a techie to use
- has a support team you can chat with if you do get stuck

Two Reasons Why This Guide is Different from Others

1

We created this guide after speaking with hundreds of membership managers from all sorts of organizations. We packed all their decision criteria and advice into this helpful guide that covers everything you need to pick a solution that will help you save time and grow your organization.

2

We conducted extensive research on all the top Membership Management Software providers to give you a comprehensive analysis of their pricing structures, features and how they compare.

By the end of this guide, you'll understand what makes a good Membership Management Software, what the most popular providers are, and which will save you the most time and money.

The Team Behind This Guide

We are Wild Apricot — a Membership Management Software company created over a decade ago.

At the time, many of us were volunteering for small associations and finding ourselves getting bogged down in administrative tasks, instead of making the impact we hoped for.

Realizing we weren't alone, we decided to create a software that could eliminate all those administrative tasks, so membership organizations could spend their time pursuing their purpose instead.

And so Wild Apricot was born. Today over 25,000 organizations use Wild Apricot. We've also been the #1 membership management software on Capterra, an independent review site, since 2012.

If you'd like to see if Wild Apricot is right for you, you can start a free, [30-day trial of Wild Apricot](#) and have your organization set up with a professional-looking website with online event and member registration in just an afternoon.

Table of Contents

What is Membership Management Software How to Know if Your Organization will Benefit from MMS What if You're a Small Organization with a Limited Budget? What if You're a Very Large Organization with 50,000+ Members?	6
The 8 Basic Features All MMS Platforms Should Have 8 Advanced Features You Might Need	11
5 Decision Criteria to Help You Pick the Best Option Look Out for These 4 'Red Flags' The #1 Way to Make the Right Decision	18
Here's What You Can Expect From the 10 Most Popular MMS Providers Pricing Comparison Support Comparison Features Comparison Advice and Options for Every Size of Organization	26
Why 25,000 Organizations Chose Wild Apricot 5 Big Reasons Why People Choose Wild Apricot Try the #1 MMS Option Free for 30 Days Presenting Wild Apricot to Your Board	41
Extra Resources to Help You Grow Your Members	45

Section 01:

What is Membership Management Software?



If you're unfamiliar with "Membership Management Software" — also known as "MMS" — here's what we mean by it.

In short, Membership Management Software is an all-in-one cloud-based tool designed to automate 90% of the administrative tasks of membership organizations. The right MMS can save your staff and board members dozens of hours of work every week.

An easy way to think of MMS is like an army of robots that run your organization behind the scenes, while you engage with members and market your events and services.

• • •

Once you start using an MMS, there's no need for Excel, Mailchimp, Eventbrite, or any of the other platforms that manage singular functions of your organization. Your MMS is an all-in-one solution that houses all your data in a single database.

How to Know If Your Organization Will Benefit from MMS



Many Membership Managers start off thinking that they need to build a custom solution to help manage their organization.

But what most eventually discover is that existing MMS platforms can more than cover their needs.

Leading database expert [Wes Trochlil](#) explains why:



“ Software companies have been developing database software for the association community for over 30 years. Each of these companies has created some type of data management system that takes into account many of the aspects of association management that you face every day.

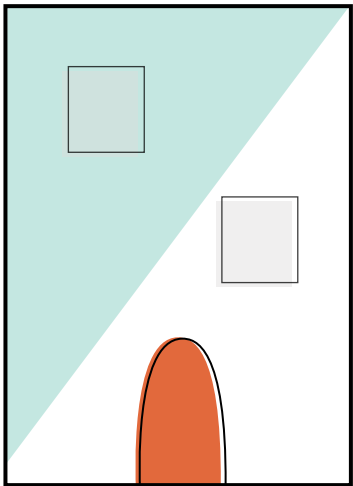
What if You're a Very Small Organization with a Limited Budget?

Some of the very small organizations (50 members or less) we spoke with were afraid they couldn't afford MMS. Plus, they were mostly comfortable with their current processes — paper registration forms, tracking contact info in Excel, accepting payments by check, etc.

If you're in this boat, you may be happy to know that MMS can still help you out — sometimes for free.

Many MMS providers offer pricing based on the number of members you have, meaning that the fewer members you have, the less you pay.

What's more is that two MMS providers offer their software completely free to very small organizations (see page 40). So, no matter how small you are, you no longer need to create spreadsheets of member information, copy/paste emails into Gmail, or run checks to the bank.

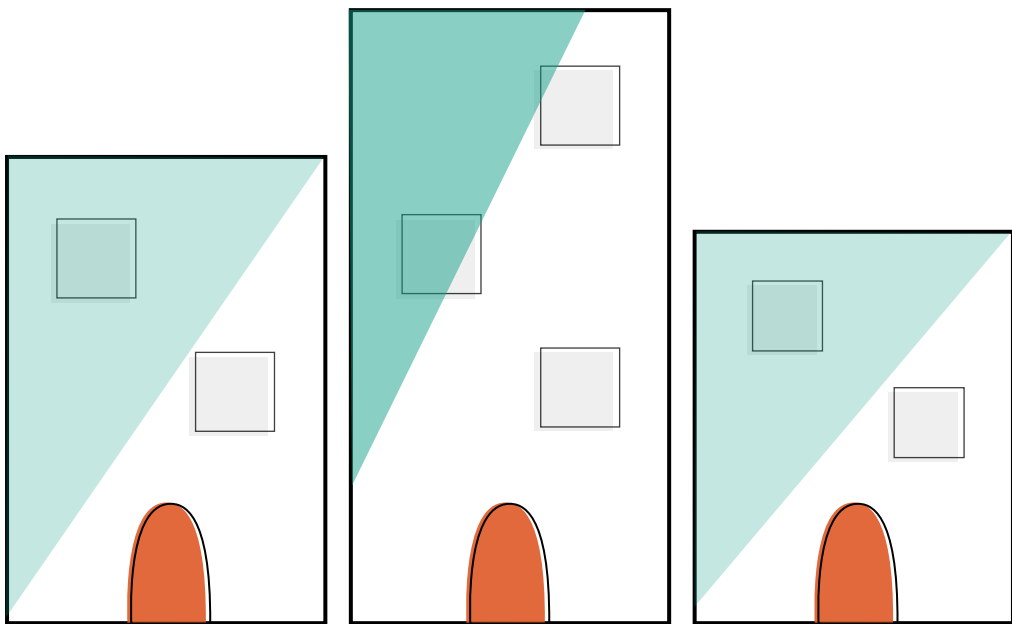


What if You're a Very Large Organization with 50,000+ Members?

From our experience, most large-scale organizations (50,000 or more members) require very customized processes that can be better provided by enterprise software.

If you are a large-scale organization, we recommended getting in touch with [Personify360](#), the leading enterprise constituent management platform, from our parent company Personify. Personify360 caters to some of the largest member organizations in the United States such as the YMCA, American Cancer Society, and the American Society of Anesthesiologists.

[Click here](#) to find out more about Personify360.



Section 02:

The 8 Basic Features All MMS Platforms Should Have

While each MMS option caters to a different niche, they should all have the following eight basic features in common.

1

New Member Registration (Escape Excel Hell!)

Your members register online and automatically receive a welcome email. Your database is instantly updated. No paperwork for you.

- Customizable online forms
- Instant database updates
- Unlimited membership levels



2

Cloud-Based Member Database

Your data is connected to your email system, payment processor and more, plus members can update the information in their profile.

- Secure, centralized, cloud-based database
- Administrative privileges set by you
- Easily filter, sort, and group members



3

Website Builder

Market your organization and events online, and give your members extra value with exclusive areas.

- Professionally designed and mobile-friendly templates and elements
- Easy drag and drop - no tech experience required
- Create popular pages such as events, blog, and member-only areas



12

4

Email Marketing

Avoid duplicate contacts and mailing list errors, and automate event confirmations or member renewal emails.

- Schedule or automate emails, including reminders
- Professionally designed newsletters and emails
- Group and filter contacts



5

Online Store

Online payments and automated order confirmations make it easy to boost your revenue through online sales.

- Add and edit products, including images
- Set stock limits to avoid overselling and disappointing customers
- Accept online or offline payments



6

Online Event Registration

Increase event attendance with easy registration, automated reminders, and a calendar to promote your events online.

- Simple online registration with customizable form and connection to database
- Calendar of events
- Member vs non-member pricing and discounts
- Automated event reminders



13

7 Online Payments

Minimize errors and missed payments by automatically generating invoices and recording payments.

- Automate member dues, renewals, invoices and reminders
- Accept payments for merchandise, events, and donations online with just a few clicks
- Easily generate financial reports



8 Online Donations

Make it easy to donate by cutting out complicated postal forms, and receive their gift immediately.

- 'Donate now' button
- Donation meter
- Automated invoices



Need More Options? Look for These Advanced Features

If you're like most membership organizations, the above features will more than cover what you need to fully manage your membership. However if your organization requires extra capability (perhaps advanced event options, or a searchable member directory), make sure you know which providers will be able to help you. To give you an idea, on the next page here are some of the extra features you can find with more advanced providers.

14

Read on to the software comparison section to see which features each of the top MMS providers offer.

1 Member-only Site

Add extra value to your members' subscription with a members-only forum, resources or events.

- Individual member logins
- Choose which pages and resources are member-only
- Customize access based on membership level

2 Mobile App for Admins

Keep on top of your admin tasks even when you're away from your desk.

- Check in attendees from your phone
- Process payments with just a few taps
- Manage and update member records on the go

3 Mobile App for Members

Stay connected with your members, no matter where they are.

- Members can register for events and pay dues from their phones
- Members can access their membership cards and view their profiles
- Members can access the directory, and communicate with other members

15

4 Multi-chapter Integration

Share data and build a cohesive look and feel between the local chapters of your organization.

- Some MMS providers offer multi-chapter discounts
- Create a membership template for your chapters
- Database can be accessed by multiple admins

5 Advanced Event Features

Offer advanced options to manage large or complex events, while keeping simple online sign ups.

- Create waitlists, guest lists, event wishlists, and ticket discounts
- Restrict event registration based on membership level
- Online RSVP and advanced registration types

6 Surveys and Polls

Learn more about your audience and engage members to help shape your organization.

- Create, edit, and duplicate polls
- Restrict access to surveys
- Collect and analyse results

7 Membership Directory

Your members can instantly find each other, whether that's to collaborate, share experiences, or promote their services.

- Publish an online member directory
- Restrict access based on membership level
- Members can update their own contact info

8 Third-Party Integration

Keep managing your website, emails, or finances with another application if you're not ready to switch.

- QuickBooks
- WordPress
- Mailchimp
- And more

More Advanced Features

- Online membership cards
- Classifieds and job ads
- And more
- Open API
- Facility scheduling
- CMS website theme overrides to allow for complete website customization
- Peer-to-peer fundraising
- Discussion boards
- Volunteer management
- Storage management

If there's a feature you need, but don't see on this list, [feel free to get in touch with our team](#) and we'll do our best to point you in the right direction.

Section 03:

5 Decision Criteria That Help Organizations Pick the Best Option

Did you know there are over 100 different MMS providers? Although most providers offer the same basic features, choosing the wrong platform can lead to hidden fees, limited support, and outdated features that can make you start your search over from scratch.

If you'd like to find your perfect provider right away, that's exactly what we're here to help you with. Most organizations that find their perfect provider first time use these five decision criteria.

But before we take a look, there are **three** key pieces of information about your organization that you need to collect. Here they are:

1

Know the size of your organization right now (both members and email contacts), as well as how large you think you'll be by next year. This will help you pick an MMS that fits the scale of your organization.

For example, you might have 500 members and email contacts combined now, and a plan to grow to 600 total next year.



Top Tip

If you have more than 50,000 members, you may have trouble finding an MMS that's right for you. In this case, it's better to choose an enterprise solution designed to suit a larger organization. We recommend Personify360, the leading constituent management and engagement platform. You can find out more about Personify360 [here](#).

- 2 Know your monthly budget for MMS, as most providers bill monthly. Also consider that some platforms charge additional fees for setup and ongoing support.
- 3 Know which features are critical to your organization, and which are nice-to-have features. Sometimes, the nice-to-have features can end up costing you a lot more, so you may want to sit down with your team and come to an agreement beforehand.

Now, here are the 5 most important decision criteria:

1 What is the total monthly cost?

Most providers range from \$30/month to \$450/month depending on the size of your organization.

Additional Considerations:

- Are there additional costs for setup, support, or extra features?
- What are the transaction fees, or do you have to set up your own payment processor?
- Do they offer discounts for yearly plans?

2 Is it easy to learn?

Every software comes with a learning curve, so having access to online help resources and live support is an important consideration.

Additional Considerations:

- Who will be learning to use the system? Is it you? Your board members? Staff? Volunteers?
- What kind of support do they offer? Phone? Email? Online wiki? Training videos?
- Do they charge for support, or is it free?
- Are there people on your team who are tech-savvy?

3 Do you need integration with existing systems?

If you have existing systems such as QuickBooks or WordPress that you plan on keeping, check which MMS providers offer integration with them. Some providers offer built-in integration, an app market, or can build you a custom solution.

Additional Considerations:

- Can the MMS provider offer all the same features as your existing systems? Maybe it's worth the switch?
- Does the MMS provider have an open API (for those who are tech-savvy)?

4 How secure is the system?

Most MMS providers offer data security that covers more than the typical organization requires. However, if you require additional data security, like the ability to set admin access levels or enable two-factor authentication, you may need to get in touch with the provider.

Additional Considerations:

- Are you dealing with particularly sensitive data?
- Are there specific data security requirements for your members?

5 How quickly do you need the software to be set up?

Some systems can be set up in an afternoon, while others require help from a specialist. Knowing when you need to have the system set up and running by can help you avoid any surprises.

Additional Considerations

- Do you need the system to be ready to use right away?
- How long does it normally take to set up the software, and will you be able to do it yourself?

Look Out for These 4 'Red Flags'



Extra fees hidden in the fine print

Always check the terms and conditions before you sign up, or you could be surprised by additional costs.



Software that is rarely updated

Because of the speed at which technology develops, software can quickly become outdated. It's best to look for an option that provides frequent updates to features to be sure that your investment will keep being worthwhile in the long term.



Limited support

Some providers charge for support, or limit the amount of support available on basic plans. Others only have restricted hours when their support team is available, or long wait times until your query can be answered. If something doesn't go to plan, you'll want easy access to someone who can help you fix things.



Limited room to grow

If you think you've found the perfect solution for your organization at the moment, it doesn't mean it will stay the perfect solution in the future. Having options for more advanced features and an increased number of admins and contacts will mean you can stay with the software as you grow.

The #1 Way to Make The Right Decision

One of the best ways to know whether or not you've found the right provider is to see what others who already use it are saying.

Two websites that offer thousands of unbiased reviews from real users are Capterra and Trustpilot:

Capterra

[Capterra](#) is an independent software review site that has 575,000 verified user reviews. It organizes products into categories to make them easier to find, so you can get started by entering 'Membership Management Software' into the search bar, and filter by selected features.

Trustpilot

[Trustpilot](#) is one of the biggest review platforms in the world, gathering feedback on over 228,000 businesses including software companies.

Whereas Capterra will help you narrow down the software providers you're looking at by comparing the features, Trustpilot is great for checking on the providers you're seriously considering to make sure users haven't had problems with billing, support, bugs, or other elements of the service.



Top Tip

When you're looking at reviews, try to find feedback from organizations that are as similar to yours if possible.

Try Before You Buy

You can avoid purchasing the wrong software by taking advantage of the free trial period offered by many providers. Trying out the software to do some key tasks with your team will show you how intuitive the features really are.

Start Your Free Trial

Section 04:

Here's What You Can Expect From the 10 Most Popular MMS Providers

Each platform suits a slightly different type of organization and offers different features. To save you the time it takes to look through all the MMS platforms available, we've looked at the most popular MMS providers to come up with a guide to some of the major software providers you'll likely come across.

Pricing Comparison

This comparison is based on your organization having 500 members and paying annually. Take a look at the providers' websites to see the pricing for more or fewer members.



Pricing Comparison

	Wild Apricot	Memberplanet	iMIS by ASI	NeonCRM	YourMembership	StarChapter	GrowthZone	BrilliantDirect- ories	SilkStart
Capterra Rating	1	2	3	4	5	8	12	NA	NA
Free Plan Available	Yes	Yes	No	No	No	No	No	No	No
Annual Fee for 500 Members	\$1,320/year	\$510/year + 4.00% fee for all transactions	\$3,600/year	\$588/year	\$3,495/year	\$1,596/year	\$1,788/year	\$950/year	\$2,400/year
Transaction Fees	Fees depend on your payment processor	3.00% + \$0.30	Fees depend on your payment processor	2.90% + \$0.30 Verified non-profits: 2.60% + \$0.30	Fees depend on your payment processor	Fees depend on your payment processor	Fees depend on your payment processor	Fees depend on your payment processor	Fees depend on your payment processor
Setup Fees	Free	DIY for free, or website migration for \$1,500	Free	DIY for free, or assistance starting at \$600	Starting at \$2,495	\$899	\$1319	DIY for free, or assistance starting at \$450	Starting at \$2,000
Support Fees	Free	Free	Free	\$50/month for some support options	Free	Free	Free	Free	Free
Additional Feature Fees	NA	Fees for additional features, training, and bulk emails	Fees for bulk emails	NA	NA	Fees for additional services including graphic design	Fees for additional features including online store and fund-raising. Website themes starting at \$3,950	Fees for additional features and private training sessions	Additional fees may apply depending on the size of your organization
Total First Year Cost	\$1,320	Varies by number of yearly transactions	\$3,600	\$588 28	\$5,990	\$2,099	\$5,738	\$950	\$4,400 29

Support and Training Comparison

	Wild Apricot	Memberplanet	iMIS by ASI	NeonCRM	YourMembership	StarChapter	GrowthZone	BrilliantDirect- ories	SilkStart
Free Trial	✓	✓	✗	✓	✗	✗	✗	✓	✓
Free Demo	On demand	By request	By request	Personal demo by request, or join regular group demos	By request	By request	By request	Online demo site, or a personal demo by request	By request
Customer Support	✓	✓	✓	Email included, phone and live chat for \$50/ month	✓	✓	✓	✓	✓
Live Chat	✓	✓	✗	✓	✗	✗	✓	✓	✓
Personal -ized Training/ Onboarding	✓	✗	✗	✗	✗	✓	✓	✓	✗
Online Wiki, or online training videos and articles	✓	✓	✓	Yes. On-demand training videos for \$50/month	✓	✓	✓	✓	✓
Customer Support Group	Facebook Group with 4,000+ customers	✗	Private member user group of 700 customers called NiUG	Community forum	✗	✗	✗	Online Community Forum	✗

	Wild Apricot	Memberplanet	iMIS by ASI	NeonCRM	YourMembership	StarChapter	GrowthZone	BrilliantDirect- ories	SilkStart
New Member Registration	✓	✓	✓	✓	✓	✓	✓	✓	✓
Unlimited membership level	✓	✓	✓	✓	✓	✓	✓	✓	✓
Mobile App for members	✓	✓	✗	✗	✓	✗	✓	✗	✗
Cloud-Based Member Database	✓	✓	✓	✓	✓	✓	✓	✓	✓
Mobile app for Admins	✓	✓	✗	✓	✓	✗	✓	✓	✗
Unlimited Admins	✓	✓	✓	✓	✓	✗	✗	✓	✓
Members can login and update their own records	✓	✓	✓	✓	✓	✓	✓	✓	✓
Add an online member directory	✓	✓	✓	✓	✓	✓	✓	✓	✓

	Wild Apricot	Memberplanet	iMIS by ASI	NeonCRM	YourMembership	StarChapter	GrowthZone	BrilliantDirect- ories	SilkStart
Website Builder	✓	✓	✓	✗	✓	✓	✓	✓	✓
CSS theme overrides for complete customization	✓	✗	✓	✓	✓	✓	✓	✓	✓
Member-only site	✓	✓	✓	✓	✓	✓	✓	✓	✓
Wordpress Integration	✓	✗	✓	✓	✗	✗	✓	✓	✓
Email Marketing	✓	✓	✓	✓	✓	✓	✓	✓	✓
Unlimited Emails to Members	✓	✗	✗	✗	✗	✗	✗	✗	✓
Professional Designed Email and Newsletter Templates	✓	✓	✓	✓	✓	✓	✓	✓	✓

	Wild Apricot	Memberplanet	iMIS by ASI	NeonCRM	YourMembership	StarChapter	GrowthZone	BrilliantDirect- ories	SilkStart
Online Store	✓	✓	✓	✓	✓	✓	✓	✗	✓
Set special member pricing	✓	✗	✗	✓	✓	✓	✓	✗	✓
Apply Taxes	✓	✗	✓	✓	✓	✓	✓	✗	✓
Auto-matically calculated shipping costs	✗	✗	✓	✓	✓	✓	✓	✗	✓
Online Event Registration	✓	✓	✓	✓	✓	✓	✓	✓	✓
Automated Email Re-minders	✓	✓	✓	✓	✓	✓	✓	✗	✓
Mobile Event Check-in	✓	✓	✓	✗	✗	✗	✓	✗	✗
Mobile Event Payments	✓	✓	✓	✗	✓	✗	✓	✗	✗

	Wild Apricot	Memberplanet	iMIS by ASI	NeonCRM	YourMembership	StarChapter	GrowthZone	BrilliantDirect- ories	SilkStart
Online Payments	✓	✓	✓	✓	✓	✓	✓	✓	✓
Automatic Invoices	✓	✗	✗	✗	✓	✗	✓	✗	✓
Recurring Payments	✓	✓	✓	✓	✓	✗	✓	✓	✓
Online Donations	✓	✓	✓	✓	✓	✓	✓	✓	✓
Peer-to-Peer fund-raising	✗	✓	✓	✓	✗	✗	✗	✗	✗
Recurring Donations	✓	✓	✓	✓	✓	✗	✓	✓	✓

*Data collected fall, 2018. All prices are in USD.

How Large is Your Organization?

Organization Size	Suggested Providers	Provider Benefits	Advice for Choosing
0 - 49 Contacts	• Wild Apricot (free!) • Memberplanet (free!)	• Free account • Free support • Basic functionality	Wild Apricot and Memberplanet are the only options that offer free basic accounts to very small organizations.
50 - 499 Contacts	• Wild Apricot • NeonCRM • Brilliant Directories	• Lower cost • Built for growing organizations • Basic event functionality	If you're not tech savvy, look for an option that includes free support and setup.
500 - 1,999 Contacts	• Wild Apricot • Member365 • SilkStart	• Easy online store to sell merchandise • Advanced event features for annual conferences • Member-only site for exclusive resources and member directories	Ask the provider for examples of similar organizations to yours to see how they're using the software.
2,000 - 49,999 Contacts	• MemberClicks • iMIS • GrowthZone	• Chapter management • Advanced features available • Custom website design available	Ask the provider about how they keep member data safe and check whether they comply with security standards and certifications
50,000+ Contacts	You may need enterprise software. We recommend getting in touch with Personify360 , the enterprise membership management software provider from our parent company, Personify.		

Section 05:

Why 25,000 Organizations Chose Wild Apricot

Wild Apricot is the #1 rated MMS (as rated by Capterra).

Here are the top 5 reasons why people chose Wild Apricot:

- 1. **We build the features you request**
Since 2012, we've launched over 200 features our customers requested.
- 2. **Wild Apricot has the highest functionality for the lowest cost**

- 3. **Free unlimited support (and help setting up too)**
When you start a trial, you'll even have additional support from our onboarding coaches, who will help you get set up in an afternoon.
- 4. **Wild Apricot has a mobile app for members and admins**
With the admin app, you can add members, create events, and accept payments. With the member app, members can view the directory, their profile, and register and pay for events.
- 5. **Updating our software is a top priority**
We are constantly improving our software, fixing bugs and releasing new features. In 2019, we released over 25 new features and updates.

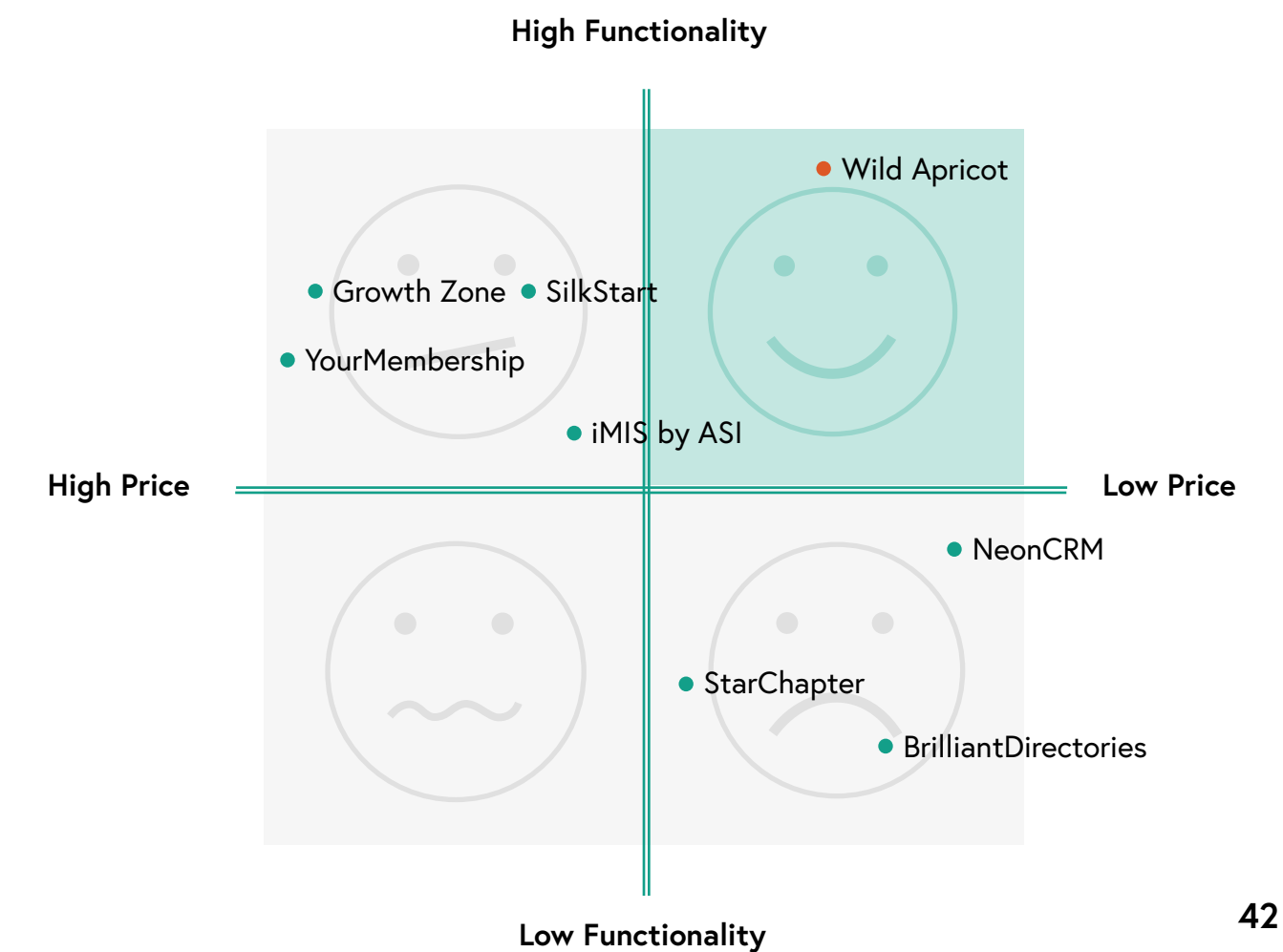
Start Your Free 30-Day Trial Now

Wild Apricot is the #1 rated MMS (as rated by Capterra). You can start a free, 30-day trial of Wild Apricot today (no credit card required) by visiting www.wildapricot.com.

If you have any questions during your trial, or if you'd like to learn more about whether Wild Apricot is the right solution for you, get in touch with our coaches at coaches@wildapricot.com.

You can also join our free online Boot Camp to become an expert in Wild Apricot in just five days. This series of five 60-minute webinars will show you how to add members, create events, set up payments, and much more. [Click here to learn more](#) and sign up.

Start Your Free Trial



Use This if You Need Help Presenting Wild Apricot to Your Board

If you're sold on Wild Apricot but need help convincing your board to make the move, here is a PDF presentation that will help.

Our presentation offers a summary of:

- Key software features
- Essential resources we offer to help you connect with your peers as well as to build and grow your organization
- Details on our turnkey solution and our terrific customer support
- Help articulating why you should switch – so you can focus on your core purpose
- Pricing information
- Customer testimonials & website examples

Download the presentation to the board by clicking [here](#).

Section 06:

Extra Resources to Help You Grow Your Members

If you need help attracting new members, Wild Apricot has a number of free resources to help you do just that.

Here is a list of our free resources that have already helped thousands of organizations:

[Expert Webinars](#)

Every month we host webinars with experts in membership marketing, fundraising, and nonprofit management. Tune in live or watch past webinars on demand to hear from their experience and tips for success.

[Membership Blog](#)

Our blog features regular posts from Wild Apricot's resident experts and selected guests that give you inspiration, tips, and resources that help save you time and grow your membership.

... and if you're a Wild Apricot customer, you can find additional support in these three places:

- 1) [Wild Apricot Boot Camp](#)
If you're getting started with Wild Apricot, or just need a refresher, join our Boot Camp! In this series of five 60-minute webinars, one of our coaches introduces the features of the software, and guides you step by step through how to do some common tasks.
- 2) [Wild Apricot Membership Tribe](#)
Join over 4,000 membership managers in our Facebook group, where you can ask questions and share insights on how to run and grow your organization.
- 3) [Wild Apricot Help Pages](#)
Our help site is packed full of detailed guides on how to do everything in Wild Apricot. Before you call the support team, take a look on the help site first - you can find the answers to lots of frequently answered questions **46** here.

We Wish You the Best of Success!

Thank you for reading our guide. We hope it's made choosing the right membership management software for your organization a little easier.

All the best!

-The Wild Apricot Team

