Bar Association Financial Software Buyer's Checklist

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Changing your financial system is a time-consuming choice that has lasting consequences for your entire organization.

We designed this buyer's checklist to make the process easier.

This checklist lists essential features required by bar associations to help them adapt to a constantly changing digital environment. In addition, we've included blank columns to help you make a point-by-point comparison with other software vendors.

Streamlined Accounting & Reporting Processes

Bar associations typically earn revenue from multiple sources, including membership dues, continuing education courses, merchandise, events, and more. Efficient tracking is essential to simplifying processes, maintaining transparency, and ensuring compliance. Below are some key features bar associations should look for when choosing a financial system that meets those needs:

- [ ] Easily set up a primary general ledger chart of accounts for simplified transactions and reporting
- [ ] Set budgets, track actuals and manage accounts with granular accuracy
- [ ] Define dimensions by business area for detailed tracking and reporting (e.g., member services, events, courses)
- [ ] Report on pre-defined dimensions using customized metrics
- [ ] Automate processes and schedule automatic reports
- [ ] Slice and dice real-time data by activity or business area to get a detailed view of exactly what's happening at any given time
- [ ] Avoid overspending and stay true to your budget by balancing cash inflows and outflows
- [ ] Adapt easily to changing compliance requirements with flexible reporting tools
- [ ] Create roles with customized features, dashboards, and reporting capabilities for individual team members and other stakeholders
- [ ] Access dozens of customized templates tailored to multiple stakeholders

Revenue Management and Payment Tools

Bar associations are diverse businesses with multiple revenue streams. Financial managers and accounting teams require streamlined and simplified accounting processes that reduce data entry and minimize redundant tasks. Here are some features to look for in a financial system that aligns with those goals:

- [ ] Offer multiple credit and debit card options with secure payment processing
- [ ] Generate numerous accounting and financial statements quickly and efficiently with automated reporting
- [ ] Integrate accounting, learning management, and membership software to reduce data entry, save time, and minimize repetitive tasks
- [ ] Create perpetual membership programs with automatic renewals, flexible payment choices, and options to pay in installments

Cloud-Based Architecture and System Access

Bar associations that embrace hybrid models and remote work need cloud-based systems that can be easily accessed by employees from any location. Here are some features to look for when choosing such a system:

- [ ] Cloud-based architecture that unites integrated software systems under a single interface
- [ ] Role-based accounts that ensure credentialed employees access the right data
- [ ] 24/7 availability from any mobile device with an internet connection
- [ ] First-in-class vendor support

Learn more about customized bar association financial software.

enSYNC delivers financial software that goes above and beyond essential features to improve efficiency, drive engagement, and provide a solid ROI.

Contact us for a complimentary consultation when evaluating your options, so you choose the best software that aligns with your association's long-term goals.

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