



BEST PRACTICES

for Choosing the Right ChMS &
Other Software for Your Church


Team [tēm]

NOUN

A group of people who come together as
a team to achieve a common goal.


synonyms: join (up) · join forces · collaborate · get together





The Problem Statement

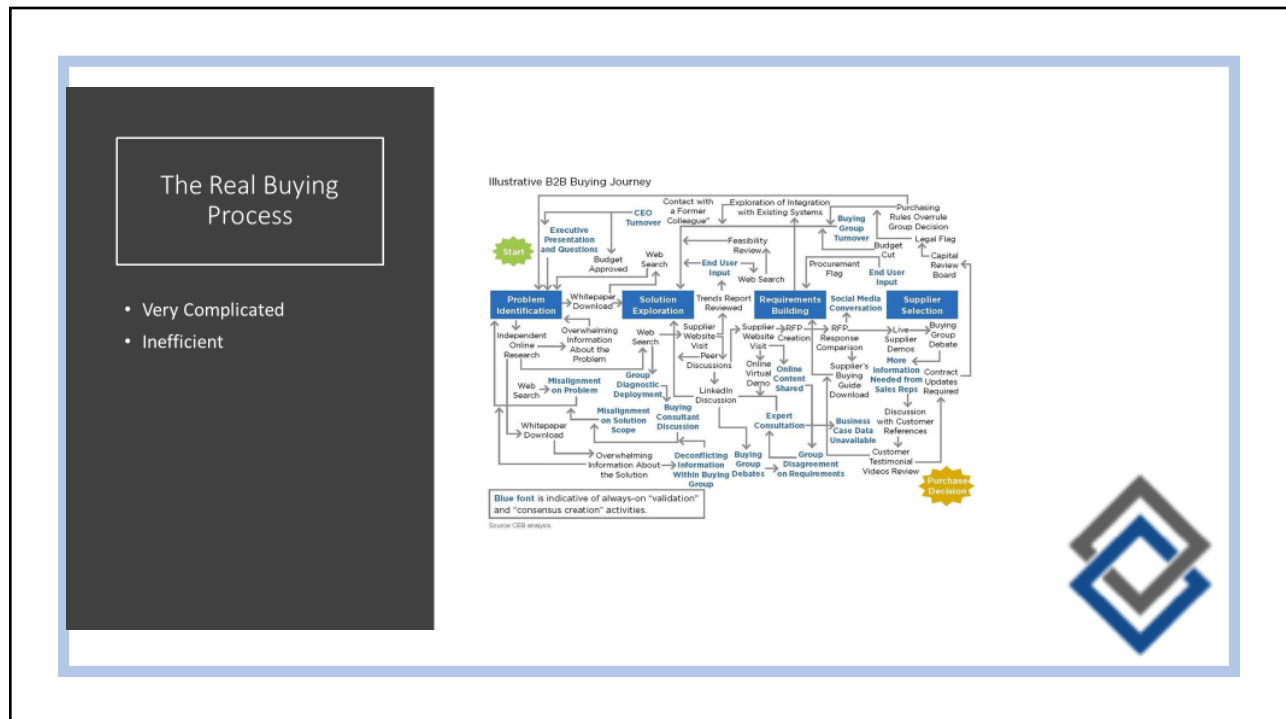
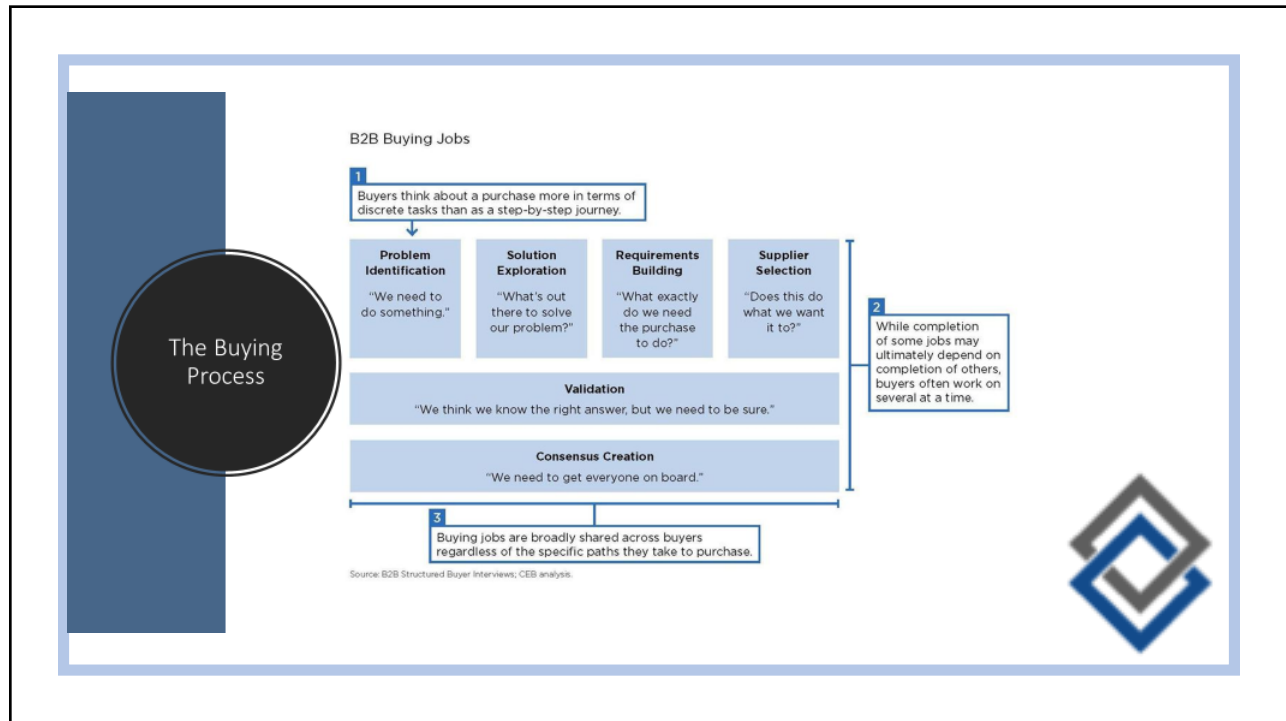
- How can we choose a software package that achieves the common goals of the church while also supporting the needs of specific roles on the team?
 - Have you ever had a large project that required adoption of a lot of people go sideways because the team wasn't in alignment?

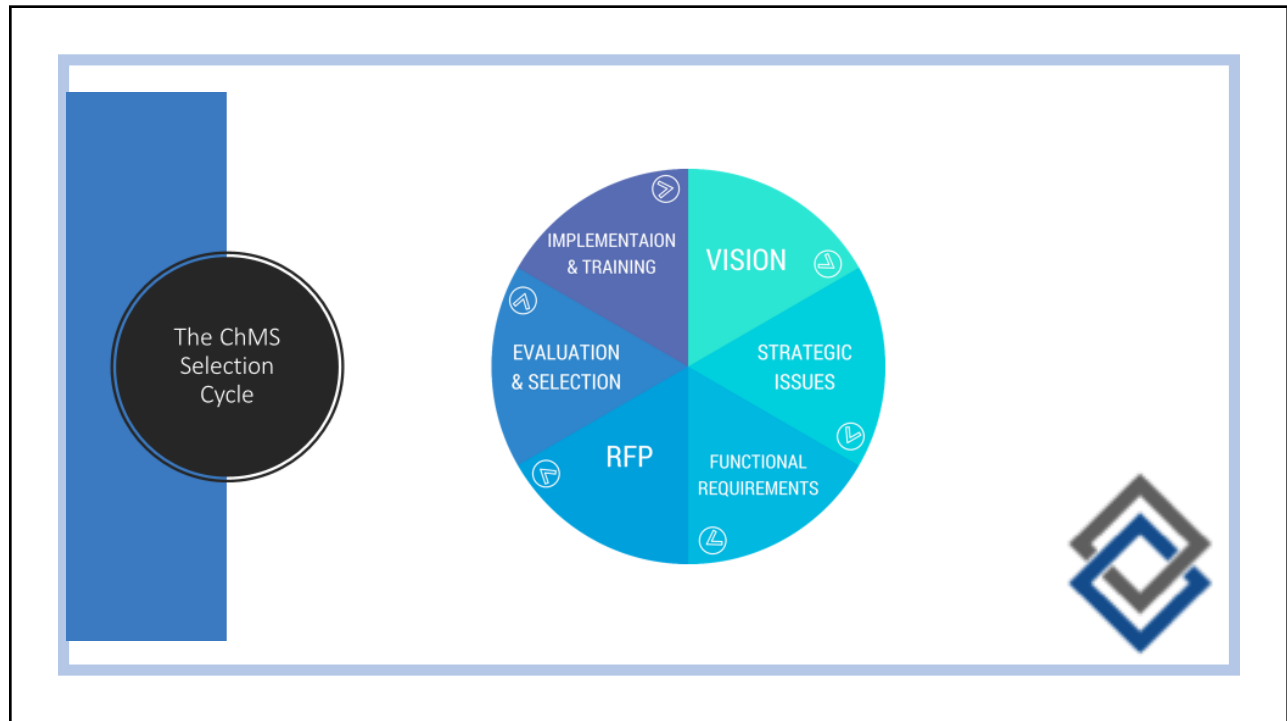



Houston, we have a problem...

- "We need to do something different" -
 - Enough people on the staff complain about the current software - or stop using it altogether - that someone (or several) decides it's time to make a change - the team is segmented and has different goals.
 - Someone on the staff comes back from seeing another church using something else and starts rallying a move to that solution.
 - A new staff comes on and lobbies for what they had at their old church.










Common understanding of the ministry *vision* - mission, purpose, values, and strategy. We must start here, because everything we do should support this goal.

The text is displayed within a dark blue, textured circular shape. To the right of the circle is a stylized logo consisting of three concentric squares.




Common Understanding

- Are we all playing the same game? Have the same goals?
 - Ever watch a peewee soccer game? That one kid that doesn't know which goal is his?
- Make sure to include Senior Leadership to confirm direction and their desired results. They may not be key users of the software, but they should have some ideas of how they measure success of the mission. What are the ministry processes they are implementing? What reports do they need?

Start wide and involve many staff

- The main goal here is to give people a voice, let them be heard in the process. Nobody likes to be "told" what to do - if they have some voice in the process, they are much more likely to support the final decision.
- Avoid watercooler conversations about how the wrong choice was made when everyone was able to speak into the choice.



Start Wide and Get Narrow as You Get Closer



All Staff Survey



Process Workshops



Demos



Deep Dive



Decision



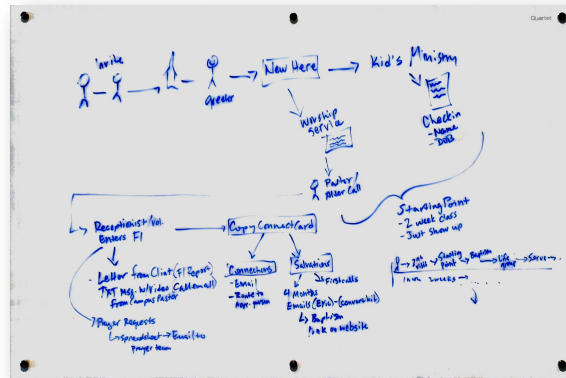
Survey

... to understand what tools various staff use, what they like and don't like about the current software, major requirements. What are the processes they are trying to manage? What reports do they need?

- Staff
- Key volunteers/leaders
- Other involved parties



Process Exploration



Define the Requirements

Flexible characteristics By group - Size, schedule, timeline, location, content, format, public	7
Categorize by type (age, ability, etc.)	4
Childcare options/kid friendly	1
Search By Above	16
Provide Request Info → Send to leader	1
Add a group member at time of attendance	5
Request info by short code text that goes to group leader	
Easy for group leader to take attendance, communicate to staff/tech	5
Reports on history w/o noise	6
Dashboard - Show groups w/filter based on user need	7
Group Resource Portal w/Docs	3



Publish...

... the requirements to potential candidates. Ask them to score their ability to meet each requirement.

- Include a variety of providers, including your current provider. They may be able to help make your current application work at less cost than making a change.
- Provide a good description of your church profile. What is your mission, values, strategy, and vision? What is your culture? What do you need from a support perspective?



- Choose the top candidates and have them present demos to a group of evaluators.
 - Include a variety of representatives from different departments and roles. Involve your key "power users" and some leadership.
 - A **scorecard** can help facilitate discussion - you need the qualitative thinkers and the quantitative thinkers to be heard. Align the scorecard to your major requirements criteria.

Demo

Deep Dive

- Select 2-3 applications to go deep with
 - Have several department admins dive in on the demos and interview the candidates to see how specific tasks actually work.
 - We provide a list of scenarios/actions to test drive how the software works in each. (Yes they check the box, but how do they actually meet the need?)
 - Include situations that may be unique to your church.



Make a decision

- Use the scorecards as a framework for discussion with the decision team.
 - Make sure to provide space for analytical, emotional, qualitative, and narrative discussions. Each team member processes information differently.



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