

**CIVICREC**

recreation  
management

# What to Look for When Switching Recreation Software Systems

12 Questions To Ask Potential Partners





## Introduction

It's Monday morning at the office, and your phone rings. When you answer, you hear the exasperated voice on the other end, and already know the purpose of the call. It's another frustrated local calling to register for a community event over the phone, because they couldn't figure out how to use your online recreation management software.

After apologizing, you start defending the software, wanting to encourage the person to use it again in the future, but quickly give up. You know better than anyone that your existing software isn't easy to navigate, doesn't clearly outline the times for each recreation activity, and often experiences payment transaction errors. By the time you hang-up, the person who called is happy, but you've lost 20 minutes out of your morning, manually processing a swim class registration that your users should be able to complete online.

You're officially fed up with your existing recreation management software and know it's time to transition to something new, but the idea of a new software implementation and data conversion process feels overwhelmingly daunting. You question if you even know where to begin your search. You know what features you have today, and what your frustrations are, but you don't know what functionality to even hope for, or what questions to ask.

Before you begin the process of choosing new recreation management software, read our list of what to look for in a robust software solution. This white paper also includes a list of 12 questions you should ask any potential vendors, to ensure they can meet the needs of your administration and your community.





## Data import capabilities

A recreation management software solution with a wide variety of features may seem impressive, but what good is flashy functionality if you don't have a mechanism to import historical information into the new system? Make sure any new solution provider can import key data into their software. A solution that requires you to start over from ground zero should be a huge red flag.

## Custom data capabilities

Every community is unique, especially yours. As you've utilized your existing recreation management software, you've likely identified custom fields and data elements you need to track that are specific to your internal operations. Choose a software solution provider with the capability to create a number of custom-developed scripts and libraries that can be leveraged for unique data imports and record maintenance.

## Choose a partner whose software is hardware agnostic

Transitioning to a new software solution represents a significant project. You shouldn't need to add an entire hardware overhaul to it as well. The ideal solution will work with your existing hardware. This includes kiosks, point-of-sale (POS) devices, printers, etc. A valuable partner will provide integration as needed and should even suggest new hardware, if applicable.





## Ensure the software is compatible with multiple browsers

Be sure to choose a cloud-based system, one that allows you to work from multiple Internet browsers (e.g., Safari, Microsoft Edge, Chrome, etc.). That way, no matter where you and your team members are and what systems you have available, as long as you have an Internet connection, you can manage key aspects of your administrative operations.

## Only choose a mobile-optimized solution

Eighty-five percent of Americans own a smartphone. Not only are your residents looking to leverage mobile technology to learn about recreation events, register, and pay in advance, you need mobile administrative access as well so that you can manage activities anytime, anywhere. Make sure any system you choose offers a mobile optimized and accessible platform.

## Ensure training is part of the package

Once your new system is built, and all your data is migrated over, what good is it if you don't know how to use it? Choose a partner that offers the necessary support to ensure you're able to maximize your new solution. Ideally, you'll want to choose from either onsite or offsite training, and you'll want access to a searchable knowledgebase for future reference.





## 12 Questions To Ask Any Potential Recreation Management Software Providers:

As you proceed through your research process, be sure to ask any potential partners the following questions:

### 1 May I see a demo?

A reputable vendor will be able to offer you a one-on-one, customized software demonstration with a knowledgeable sales representative, to ensure the solution meets the needs of your administrator and your residents.

### 2 Can I begin with a free trial?

How better to verify that the prospective solution is truly as intuitive as they say it is, than with a trial?

### 3 Describe your implementation process.

Be sure the vendor is willing to assign you a dedicated implementation manager. As with any software transition, you'll want the support of hands-on experts and a reputable solution provider should make a dedicated point-of-contact available to you, for your convenience.



**4 What happens with our existing database, accounts, bookings, and memberships?**

Make sure any potential vendors can import existing, current and historical facility and registration data into their system, otherwise—not only will you lose reportable, historical data—you’ll risk losing current rosters and payment history, which could be disastrous for you, your facility managers, and your users.

**5 Do you offer a POS module option?**

The ideal recreation management solution will allow users to register for events, classes, activities, and leagues themselves, and it will allow recreation managers to register people on-site; all integrating into a single database. It should also allow you to accept transactions for ancillary items, such as concession goods, or accept annual membership registration payments. Also, ask if the POS solution can accommodate not just ticket or membership payments, but facility rental fees as well.

**6 Is your solution mobile responsive?**

Today’s mobile-minded residents will expect to be able to view, register, and pay for recreation activities from a smartphone or tablet. Any recreation management software you implement needs to be mobile-optimized, without the need to download a separate, mobile application.

**7 What reporting options does your software provide?**

While the availability of standard reports is important, the most valuable potential partners should prove that they offer flexible and customizable reports, as well.





**8 Can you add custom fields to your database?**

If the answer is no, and you know you need customization capabilities, there's no need to take your discussions further.

**9 Will your software work with my existing PCI-compliant hardware?**

If a vendor tells you that to use their software, you also have to purchase their hardware, such as POS tools, keep searching. A valuable partner will offer software that pairs with your existing PCI-compliant hardware.

**10 What training do you make available?**

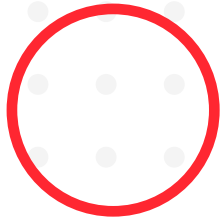
Any reputable partner should offer you customized training, along with available support resources for ongoing troubleshooting and learning.

**11 How are credit cards processed? Can we retain our merchant provider?**

Make sure you're not limited to the vendor's preferred payment providers. An ideal solution will offer multiple credit card processing options.

**12 We use financial software. Will your software integrate with our existing system?**

If financial system integration is a must-have, ask the question up front. You'll want to choose a partner that can produce a general ledger data extract compatible with your financial/accounting system, for seamless data integration.



#### ABOUT THE AUTHOR

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As the director of product management and subject matter expert for CivicPlus' Recreation Management software, Brian is primarily responsible for ensuring our parks and recreation customers are fully leveraging all the flexible features and modern functionality offered by our local government recreation management software. Brian stays immersed in the trends and technologies impacting parks and recreation departments, so that he can serve as a critical link between the product development and service delivery teams, to ensure our product continues to evolve as the needs of local government evolve. Brian earned a Master of Business Administration degree in Management from Western International University.



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We deliver the industry's first and only Civic Experience Platform. It enables local governments to drive more revenue, operate more efficiently, and generate positive recognition for the many services they provide every day.