

WHAT TO KNOW BEFORE YOU SWITCH

*TOP 10 QUESTIONS
TO ASK WHEN CHOOSING
A NEW CHURCH
MANAGEMENT
SYSTEM (CHMS)*



TouchPoint

See disciples. Not data.

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INTRODUCTION

Many churches have been using church management technology for several years now, but they are frustrated.

A development stall in the industry has caused many systems built for churches to lag far behind what is possible with commercial contact management systems.

In some cases, ministry staff and church members have stopped using the system, and now their data is out of date. Other churches have adopted new technologies to solve specific ministry pain points, but the data that resides within those systems don't sync with the others.

These headaches have made too many church databases a source of embarrassment for church administrators. What's more, they prevent church leaders from gaining a complete picture of who attends the church, how they are participating

in church programs, and what drives them to deepen their commitment.

At TouchPoint, we believe that when it comes to technology and church, your church management system (ChMS) should be the most vital tool in your kit for achieving your Kingdom goals. That's why we created this resource. The following 10 questions (and answers) were designed to help you navigate what is too often a long and painful process. It shouldn't have to be that way.

Using these guidelines, we hope you will feel empowered and equipped to confidently choose your next church management solution.

Given the abundance of church management systems available, it can feel overwhelming to start narrowing down your search. But you can eliminate well over half of the available options simply by deciding which features your church management software must have.

The church is meant to be an integral part of members' lives between Sundays. That's how spiritual maturity develops and how the body best serves the wider community.

"Well," you may be asking yourself, "that's great and all, but how do I even know which features I should demand my church management

software have?" A practical way to approach this question is to first establish what you would like to accomplish as a church.

#1 WHAT ARE YOUR NON-NEGOTIABLES?

THERE ARE DOZENS OF CHURCH MANAGEMENT SOLUTIONS AVAILABLE. STARING OUT AT A VAST SEA OF DIFFERENT OFFERINGS, WHERE DO YOU EVEN BEGIN? START BY IDENTIFYING YOUR CHURCH'S ABSOLUTE NECESSITIES.

Given the abundance of church management systems available, it can feel overwhelming to start narrowing down your search. But you can eliminate well over half of the available options simply by deciding which features your church management software must have.

“Well,” you may be asking yourself, “that’s great and all, but how do I even know which features I should demand my church management software have?” A practical way to approach this question is to first establish what you would like to accomplish as a church.



DETERMINE THE TOP GOAL YOU'RE LOOKING TO ACHIEVE

Ask yourself and your team: What’s one thing we want to do better as a church and ministry staff? A few examples of top ministry goals include:

- » Equipping staff with tools for better assimilating new members to the church
- » Giving lay leaders tools to manage their individual small groups or ministries
- » Unifying all the church’s data into a single database

Once you’ve established a concrete and measurable goal, you can begin to evaluate each church management system’s suite of features for how well they will help you reach that goal.

IDENTIFY SYSTEM FEATURES THAT FIT YOUR OBJECTIVES

Some examples of features that could help your ministry achieve the goals noted above include:

REPORTING – Your database is only as valuable as **the data that is in it** and the **data you can get out of it**. If you can't get data out of your database, what's the point of putting it in? Look for systems that provide strong reporting you can actually use.

CONTRIBUTIONS – Contributions are going to be a key element of whatever system you are using. Does the system support not just one-time giving but also recurring giving? Can people get their contribution statements after they have given through the system? How much of the contribution do you get to keep (what are the transaction fees)? These are key things to look for as you scout church management systems.

CHECK-INS – Check-in for children's ministry should not only provide security and name badges for children, but it should also record attendance in your database. Many churches have gotten away from taking attendance in classes and Sunday services, largely for practical reasons. Sometimes the only way churches have of knowing which families are most active is to check how often their kids are attending children's ministry.



REGISTRATIONS – Churches do a lot of registrations. Unfortunately, many church management software systems are clunky when it comes to accomplishing this task. Because this tends to be a troublesome area, ask: What does this software do to smooth out the rough edges of the registration process? How can it make registrations quicker, easier, and more convenient for your church?

FOCUS YOUR SEARCH ON THE SPECIFIC NEEDS OF YOUR CHURCH

There are a lot of great church management systems out there that can do a lot of great things. But they may not necessarily be great *for your church*. Focus on your needs by honing in on what you really want to accomplish. This will help make your search more targeted and fruitful.

If your goal is putting tools in the hands of lay leaders, look for systems with things like check-in and registration features that will be useful to them. If your top priority is unifying all your data, make sure you focus only on systems that will connect directly to your database. Let your goals drive your search, especially in the early stages when you have a ton of different options in front of you.

#2 WHAT FEATURES HAVE YOU NOT CONSIDERED?

AFTER YOU HAVE ESTABLISHED YOUR NON-NEGOTIABLES, LEAVE SOME ROOM FOR FEATURES YOU'RE NOT AWARE OF YET. THIS IS THE POINT IN THE PROCESS WHEN YOU SHOULDN'T BE AFRAID TO ASK, "WHAT IF?"

Church management software evolves quickly these days. You want to make sure you're open to things you didn't even know were possible with a ChMS. While it's good to have your non-negotiables and know what you want, you don't want to be so rigid in *only* focusing on those things that you miss out on some valuable opportunities for improving your church.

When you open your eyes and mind to some of the "what if" features available with today's church management systems, you may discover the potential for doing some incredible things. While your non-negotiables will help you narrow down your search, the "what if" features will help you gain a better understanding of what's available and what it is you want.

EXAMPLES OF "WHAT-IF" FEATURES YOU MAY WANT TO CONSIDER

If you've ever shopped for a smartphone or computer, you know the experience: You go in looking for a few select features (this much

memory, this size screen) and end up finding a few products that offer those core needs plus a few more features you didn't even know you wanted. In many cases, those "extras" end up being deciding factors.

What are some things you might not know you want from your ChMS but are available? Here are a few examples:

What if you could automate tracking member participation?

One thing TouchPoint can do that many churches haven't even thought of is track different levels of member involvement. Using the system, you can set specific criteria such as events attended, contributions made, and so on, and the system will automatically assign people a status such as "active attender," "connected," or "active giver" when they reach pre-set milestones.



What if you could perform specific searches of your database?

Let's say you wanted to find male church members in a certain age bracket from a specific zip code for a men's ministry fall retreat. Wouldn't it be great if you could do a search of your database to find this information, and then email those individuals directly with a registration form? Some church management systems can give you this capability.

What if group leaders could get a better sense of who is attending (and not attending)?

Another great feature some church management systems may be able to provide is the ability for a leader to take attendance using a mobile app at group events, and then receive an

email list each week telling them who was absent from the class and if any guests were in attendance. This allows the leader (or someone else in the ministry) to reach out to people who may have missed a couple of groups or classes or to thank any new guests for attending.

What if we could use our church management system to help support mission trips?

With TouchPoint, people going on mission trips can track the balance of their trip funds and send support emails asking friends and family to contribute to their trip. The ChMS makes this process a whole lot easier both for people who want to go on mission trips and for those who want to support their amazing efforts.

KEEP YOUR EYES OPEN FOR ADDED VALUE

Sometimes the most used and valued features of a ChMS aren't those initial non-negotiables. Sometimes they're the ones you didn't even know were available. Keeping your eyes open at this stage in the process may help you find a few standout systems with the potential to offer big improvements. Leave yourself the latitude to find out about new features and ask "What if?"

#3 WHO ARE YOUR DECISION-MAKERS?

YOU'VE DECIDED ON YOUR NON-NEGOTIABLES, AND YOU'RE GOING TO KEEP YOUR EYES OPEN FOR FEATURES THAT COULD BE GAME-CHANGERS. WHAT'S NEXT? IT'S TIME TO IDENTIFY THE PEOPLE WHO WILL HELP YOU MAKE THE FINAL CALL.

At this point in the process, you want to identify your key decision-makers. You want to establish this as early as possible so you don't get stuck in the weeds by establishing a committee made up of the "wrong" people, which can derail the entire decision-making process.

RECRUIT THE "RIGHT" PEOPLE TO HELP YOU MAKE THE CHMS DECISION

Generally, the people within your church whose input you need will fall into two groups:

1

The people in your church with the *information* to help you make this decision. This includes those who have a strong understanding of church technology, financials, communications, and other areas, as well as ministry leaders who have the final say in any big decisions like this.

2

The people in your church with the *insight* to help you make this decision. These are the people who are going to be most affected by your new ChMS: the end users, the ones who will be interacting with it the most. This could include lay leaders, small group leaders, congregation members, or other specific people in your church depending on your ministry goals.





You want to make sure you're establishing who this software is going to be affecting the most and who's going to be the driver of this decision. That way you're being efficient with your time and making sure you're choosing the right software.

DON'T FALL INTO THIS ALL-TOO-COMMON TRAP

Too often choosing a new ChMS is a project or decision that will get put off on the IT team or "computer guy." While there's nothing wrong with the IT team or someone with technological know-how leading the charge on finding a new system, it shouldn't be solely in their hands. Here's why...

What might be user-friendly to one person (particularly someone who is tech savvy) may not be user-friendly to another (particularly someone who is not all that tech savvy). You want to make sure the people who are actually using the system are involved

in this process early enough that their thoughts, opinions, and feedback are given substantial weight.

Many times when the IT person makes the selection and takes the software to the team, those individuals quickly find they have many questions or issues—or they identify elements of the system that won't work for what they want to do. Then the church has to go back to the drawing board. If decision-makers would have had that input earlier in the process, they could have saved a lot of time and energy.

ESTABLISH A STREAMLINED PROCESS TO GET INPUT FROM MULTIPLE GROUPS

The best way to approach the process of finding the right ChMS for your church is to go in with a strategy. Have a person or team who can vet systems based on your non-negotiables and general church needs.

#4 HOW MUCH SHOULD SOFTWARE COST?

AT THIS POINT, YOU KNOW WHAT YOU WANT AND WHO'S DRIVING THE PROCESS. NOW IT'S TIME TO TALK ABOUT MONEY. BUT WHEN IT COMES TO A CHMS, THERE'S MORE TO CONSIDER THAN THE NUMBER ON THE PRICE TAG.

Your search team can bring back 3-4 selected systems; provide information on them to key leaders in areas such as finance, IT and communications and set up demonstrations for specific groups of end users. Based on their feedback, you can see if you want to continue to explore those systems or look for other ones that will better meet your church's needs.

How much easier would the buying process be if cost were not a factor? You could get the product you wanted with no restrictions. Unfortunately, that's not the reality we live in. It's certainly not the reality for churches—and even if it were, those churches wouldn't be good stewards if they spent that way.

The truth is, when you're searching for a new ChMS, cost matters. It matters a lot, probably as much or more than any other factor. That's why you want to have a high cost awareness throughout the process.

THREE ESSENTIAL TIPS WHEN CONSIDERING CHMS COSTS

Here are three key things to keep in mind when it comes to the costs associated with different church management systems:

1 Before you start getting hands-on with software, know the price.

The cost of a system should never be something mysterious or unknown. Many times churches will fall in love with a software before they know how much it costs. Then they get the contract in hand and are floored. You definitely want to avoid falling into that trap.

Make sure whatever software you're evaluating is upfront about its pricing. Don't be afraid to ask straight up, "How much is this going to cost us?" If a salesperson is unwilling or unable to give you a straight answer, consider that a red flag.

2 When you sit down to consider cost, look beyond the numbers.

Don't look at the price of a software and think that's the bottom line. Look beyond the numbers. What efficiencies is this software going to bring to you and your team? If there's a process that's currently taking hours for you to

complete and this system can whittle that down to minutes, that's building efficiencies and allowing your team to focus on more important things. There's value to that.

FOR EXAMPLE

Let's say it's a person's job to go through and set different status levels for church members each week based on attendance or contributions or participation in events. If a new church management system can do that job automatically, that person can spend his or her time doing other things. That's going to make your team better. The system pays for itself in that capacity. Be sure to calculate that into your budgeting.

3 Don't forget about transaction fees—what's the long-term cost?

There are a lot of systems out there that take a cut whenever a contribution to a church is received through the software. That's how they make money; that's part of their revenue stream. While the overall price on a system may appear lower, it comes with higher transaction fees to make up for that over time. Always be sure to ask about *transaction fees* and *merchant provider fees*. What you might find is that some systems aren't quite as cheap as they appear to be—and will actually end up costing you more in the long term.

One thing TouchPoint does is we don't take a cut of any contributions that occur in the software. We also integrate with a merchant provider called TransNational, a secular company that has a ministry called MyWell, which passes along the charges of each transaction *at cost*. What that means is, if VISA charges you 1 percent, they charge you 1 percent. They don't take a cut. So between TouchPoint and TransNational, you're getting the best possible rate for your transactions.

#5 WHAT SYSTEMS WILL YOU NEED TO COMBINE?

OFTEN WE HEAR FROM CHURCHES THAT WANT A “SILVER BULLET” SYSTEM. BUT THAT MAY NOT BE THE BEST APPROACH. IT’S IMPORTANT FOR YOU TO ASK, WHAT SOFTWARE DOES IT MAKE THE MOST SENSE FOR YOU TO COMBINE?

“I wish I could do it all from one place.” In a world of increased technology juggling, where you may be jumping from email to social media to spreadsheets to a variety of different apps in a given hour, this is a familiar refrain. It’s the technological dream—to have one hub where you can conveniently do everything.

In many ways, that’s what a church management system does. It gives you a centralized location for managing a number of church tasks—from check-ins and registrations to contributions and volunteer management. But it probably won’t do *everything* you need. And, in all honesty, you probably don’t want it to.

IT’S OK TO USE OTHER SYSTEMS OUTSIDE YOUR CHMS

Outsourcing software is a somewhat controversial topic in the ChMS industry. Let’s be clear, you absolutely want all your data to be in one place. That’s essential. All your current members, all your non-members, contributions, attendance—that all needs to be in one place. But there are some things that you might look at outsourcing.

What happens a lot of times with software systems that try to be all things to all people is they end up doing a lot of things mediocre—rather than doing a smaller number of things exceptionally well. You’ve probably heard the phrase “jack of all trades, master of none.” That happens a lot with church management systems. If they do everything, they may not do anything particularly well.

EXAMPLES OF OPERATIONS YOU MAY WANT TO CONSIDER OUTSOURCING

What are some things that can be outsourced? Here are a couple examples of functions you might want from your ChMS, but in actuality you might be better off getting elsewhere:

Financials - This is an area where you might consider looking at a third party like QuickBooks that's outside the realm of church management software. Your ChMS is member-focused and people-focused. Financials will include your general ledger, payables, receivables, and so on, which don't have any direct

connection with the members of your congregation. It makes sense to keep your financials separate.

Resource Management Tools - There are some great resource management tools out there. Your money may be better served using a tool that has all the bells and whistles that will do the job with excellence. There's software available called eSPACE by Cool Solutions Group that is a wonderful resource management tool. It might be better to use something like that outside of your ChMS rather than trying to shoehorn in a solution that does a mediocre job.

DEBUNKING THE MYTH OF THE "ONE-STOP SHOP" CHMS

There's no question your database needs to be your single source of truth. But it's not necessary to integrate with everything out there. The truth is you don't need a one-stop shop for all your church operations.

#6 WHAT DATA MIGHT BE LOST IN THE CONVERSION PROCESS?

IT'S TIME TO TALK ABOUT DATA. THIS PART OF THE PROCESS IS SO IMPORTANT AND YET SO OFTEN OVERLOOKED. YOU NEED TO THINK AHEAD TO AVOID LOSING ANY VALUABLE CHURCH DATA WHEN YOU SWITCH OVER TO A NEW SYSTEM.

Anyone who has ever lost a Word document they were working on because they forgot to save the file or their computer suddenly shut down knows the painful heartbreak of lost data. It's a soul-crushing experience. You have something so valuable, and then, in an instant, it's gone.

What will happen to your old data is a too-often-overlooked element of switching church management systems. Here's what you don't want to happen: You don't want to fall in love with a software on the front end, only to find out on the back end you're not going to be able to bring over the existing data that you thought you could. That's why you have to ask the right questions early in the process.

THREE KEY QUESTIONS TO ASK ABOUT CHMS DATA CONVERSION

When it comes to data conversion, what are the things you need to think about as you explore new church management systems? Start with these questions:

1 What data do you need to bring over?

What data do you have that is critical to bring over to the new system? This is important to know and may even help determine which systems you choose to explore further (it could be a non-negotiable).

Make sure you ask software salespeople up front, What kind of data can I bring over? Giving history? Attendance history? And what might be lost if I switch to this software? Know what the situation is with each software, so you can ask yourself and your team the next questions...

2 What would losing your previous data mean?

What's it going to mean for your team if you can't bring over your giving history? Or what if you can bring over last year's giving data, but you can't bring over any previous years? What's it going to mean for your small group leaders if you can't access attendance history from last year? What's the impact level?

For some churches, losing past data might not be a big deal. It may be easily accessible from another space when necessary. For other churches, it may be a big deal. Your team may need to access that data for all sorts of things. That's why you want to make sure you ask whoever's telling you about the software: Am I going to be able to bring over the data that I need?

3 What are the hidden costs of lost data?

Going back to the previous conversation about cost, how much will it cost your church if you lose your previous data or if you can't have all your data in one place? Again, this doesn't necessarily mean how much money will it cost you. Is it going to cost your team time and aggravation?

For example: If there's ever a question about who attended camp back in 2015, the person who's checking will have to go to a separate system to find that data. It may seem like a small hassle in the moment. But, over time, small hassles tend to pile up and become big hassles. And that can come at a cost.



**THINK AHEAD BY LOOKING
BACK AT YOUR DATA**

Switching over to a new church management system isn't only about what happens to your data moving forward. It's about integrating your existing data to make it convenient and accessible for your team. You want to make sure you can bring over information from previous systems without losing what's important.

#7 WHAT IS YOUR TIMEFRAME FOR MAKING THE SWITCH?

YOU'VE DECIDED WHAT YOU'RE LOOKING FOR, YOU KNOW WHO'S DRIVING THE DECISION, AND YOU KNOW YOUR BUDGET. NOW IT'S TIME TO SET A TIMELINE FOR CONVERSION. HAVING A SOLID TIMELINE WILL HELP YOU KEEP THINGS ON TRACK.

Whenever you're working on a project, timelines are essential for a few reasons:

- 1** They give everyone working on the project a clear picture of what's to come.
- 2** They keep the project moving forward and prevent it from stalling out.
- 3** They give the project an end point.

The process of looking for a new church management system can be long and laborious. Without a timeline for making a decision and moving forward with a system, the search process can go on forever. There's always more to examine, analyze, and explore. But the point is not the process. The point is to find a system that will help improve your church and to start using it.

TIPS FOR ESTABLISHING AN EFFECTIVE TIMELINE FOR SWITCHING YOUR CHURCH MANAGEMENT SYSTEM

Here are a few things to keep in mind when developing a timeline for finding a new ChMS:

Make sure you share your timeline with software sales teams

It's important for you to clarify with your salesperson the time frame in which you're looking to implement your church management system so you can ask them: How long is it going to take to install the system if I sign a contract today? How long is it going to take us to learn this? How long is it going to take us to implement this?

Your salesperson should have solid answers to those questions. Knowing those answers could have an impact on the software you ultimately choose. The timeline for implementation might be an important factor. You want to have some good, realistic expectations on the front end.

Remember, your decision dates and go-live dates are different

One thing churches often forget to take into account is that your decision dates and your go-live dates are typically different. The day you sign your contract is not usually the day you can start using your system. Unless you are a very small church not looking for any data conversion, it will likely take some time to set up and customize your system.

Include room in your time frame for system acclimation

Even once your system is live, you want to build a little extra space in your timeline for training and getting your processes in place for check-ins, registrations, and other common tasks. You should be assisted in those areas by an implementation manager provided by the software company who is there as a resource to help guide you through the new system.



#8 CAN YOU TRUST A SOFTWARE SALESPERSON?

YOU MAY INSTINCTIVELY QUESTION THE MOTIVES OF SALESPEOPLE, BUT WHEN YOU'RE LOOKING FOR A NEW CHMS, SALESPEOPLE ARE AN IMPORTANT RESOURCE. IT BENEFITS YOU TO HAVE A PLAN TO MANAGE YOUR RELATIONSHIPS WITH THEM.

Whenever you're talking to a salesperson, thoughts may run through your mind like: What are the ulterior motives here? What are they getting out of this? What's their angle here? Life experience has taught us that we should be asking those questions and that we should be a little bit leery of salespeople.

The answer to the question "Can you trust a salesperson?" is: most of the time. The sales industry has a black eye because of a few bad eggs. But most salespeople aren't out to "pull one over on you." They are legitimately trying to connect products and services with people who are interested in them. They genuinely want you to be happy with your purchase.

FOUR TIPS TO HELP YOU BEST MANAGE CHMS SALES INTERACTIONS

When it comes to church management systems, salespeople play a key role in informing you about the system. So the dynamic you have with your salesperson is important. Here are some tips to help make that relationship a good one:

1 Use your salesperson as a resource.

When you're looking into church management software, your salesperson needs to be a resource for you. This might be your first or second time choosing a new software and you may be really good at it. But for that salesperson, this might be their 100th time going through that process. It might be their 200th time. They know how this process should go. Lean on them as a resource.

2 Ask them hard questions.

Look to salespeople to guide you through the process. Ask, "What are our next steps?" If your salesperson comes back and says the next step is you need to sign a contract today, they probably don't have your best interests at heart. What they should be telling you is, let's get the rest of your team involved. They should be spending time with you and your team to make sure everyone is on board.

Also, don't be afraid to ask, what are some of the not-so-great parts of the system? If they're telling you "our system is perfect; there's nothing wrong with it," that's a red flag.

3 Set and define clear boundaries.

After receiving a sales demonstration, it's OK to say: "Thank you for showing me this demo. I'm going to show this to my team on the 15th, and you can call me on the 16th. I may call you before that, but if you haven't heard from me by then, feel free to give me a call." That sets a clear boundary for that salesperson.

If they are valuing those boundaries, that's a good sign. If they are still pestering you after you specifically told them, "don't reach out to me until the 16th," that's a pretty good indication of how that company does business.

4 Communicate openly and honestly.

Be upfront with ChMS salespeople. The more you communicate with them, the less you're going to be bothered by them. Most salespeople have bosses coming to them looking for updates. That's why they keep checking in with you. If they can't get ahold of you, they're going to keep trying back.

Setting clear boundaries and communicating your expectations with salespeople can make a big difference in streamlining the process. A good salesperson will appreciate your forthcoming approach and respect your wishes.



#9 WHAT RESOURCES WILL YOU NEED TO MAKE THE SWITCH?

PUT A STAR BY THIS ONE BECAUSE IT'S IMPORTANT. ONE THING CHURCHES OFTEN DON'T THINK ABOUT (UNTIL IT'S TOO LATE) IS WHAT KIND OF SUPPORT THEY'LL GET FROM THE SYSTEM AFTER THEY SIGN ON THE DOTTED LINE.

You may know the feeling of buyer's remorse. You purchase a car and only get a few miles away from the dealership when the doubt creeps in. You start wondering, did I get sold a bill of goods? This is what you want to avoid when purchasing a new church management system.

The way to avoid it is by making sure you have ample resources and support available to you *after* your purchase is made. Here are some things to consider about what different church management systems will offer your church beyond the sales process.

HOW WILL THEY MAKE SURE YOUR CHURCH HAS A GOOD EXPERIENCE?

Every church is different. Every church is going to use a software in a slightly different way. What you want to know is this: What is each system and the team behind it going to do to make sure *your church* has a good experience using it?

Make it a point to find out what will happen after you sign on with each

particular system. Are you going to be provided an implementation manager? Are you going to be assigned someone who's going to come alongside you and help you get this system up and running? These are resources that any good church management system should provide to you.

GET A CLEAR PICTURE OF WHAT SUPPORT "LOOKS LIKE"

Before you sign your contract, make sure you ask questions like:

- » What resources am I going to have after I've switched to this database?
- » What does the support process look like? Where do I go when I need help?
- » What's the support team like? What's their availability?
- » Are they going to be responsive? How quickly will they respond?
- » What kind of documentation do they have on their website?

CONSIDER THE SALES RELATIONSHIP AS AN INDICATOR OF WHAT'S TO COME

What you experience in the early stages of interacting with a company can tell you a lot. If things aren't ideal early on, can you expect them to be better later? If your relationship with the salesperson isn't the best, that could hint at potential problems down the road after the contract is signed.

You also have to ask the question: Is this salesperson overpromising? If it seems like they have the golden ticket when you ask them any question about their software, that could be a bad sign. Ask yourself: Is this going to be a good relationship moving forward, or am I being sold a bill of goods?



#10 IS SWITCHING REALLY WORTH THE HASSLE?

SWITCHING CHURCH MANAGEMENT SOFTWARE SYSTEMS CAN BE A TIME-INTENSIVE AND FRUSTRATING PROCESS. IS IT WORTH THE EFFORT? WHILE THE ULTIMATE ANSWER WILL BE DIFFERENT FOR EVERY CHURCH, IT'S ALMOST ALWAYS WORTH TAKING THE JOURNEY.

There's no reason to sugarcoat it: The process of searching for a new ChMS is a tough one. It can be confusing, it's a decision with significant cost attached, and there's some risk involved. All of that hassle can be pretty painful when you're going through it.

WHY SHOULD YOU PUT YOUR CHURCH THROUGH THE PROCESS OF SEEKING OUT A NEW CHURCH MANAGEMENT SYSTEM?

Here are a few good reasons:

This is an extremely important tool for your church

The thing about church management software is it touches everyone in your church. Not only senior staff. Not just lay leaders. But every person who walks through your doors is in some way going to be affected by church management software. So this is a big decision. You want to take your time with it. You want to make sure you're making the right choice.

There's a chance you might not find something better. And that's OK.

We recently completed a bid for a church that put some significant time behind their ChMS search. They vetted 50 different systems. They sent RFPs to 20 of those systems. Of those 20, they invited 5 to come on-site and do demonstrations. Then they invited some to come back and do more demos.

The entire process was a big hassle for them. But one thing they made clear throughout the process to every salesperson who walked through the door was they needed to show them why it's worth making the switch. If the systems they saw weren't enough of an upgrade, they might stick with what they currently have. This church made that crystal-clear—and so should you.

When you find the right system, the destination is worth the journey

Every number is a person for whom Christ died. That's such a great reminder of why your software matters. When you're in this buying process, if you believe a system can help you reach one more person, create efficiencies so you can better connect with members or potential members, or preach the gospel to someone who might not have heard it, then yes, that system is absolutely worth it.

CONCLUSION

Choosing a new church management system is a big decision, an important decision, and a hard decision. It's also a choice that can have a profoundly positive impact on your church—both today and moving into its future.

An effective ChMS will enable your church to forge stronger digital connections, better use data to speak to members, and solve key ministry pain points and increase efficiencies.

All of that means more time and opportunities to focus on the heart and soul of your church: the people.

To make sure you're getting the best possible software to meet the needs of your church, you want to have solid strategy as you search for your next church management system. To give you a quick recap, here are 10 questions to ask before you start looking for your next ChMS:

1 What Are Your Non-Negotiables?

- *Determine the top goal you're looking to achieve*
- *Identify system features that fit your objectives*
- *Narrow down your search to systems that fit your focus*

2 What Features Have You Not Considered?

- *Ask "what if" your church had these capabilities*
- *Consider the improvements you could make*
- *Keep your eyes and mind open for added value*

3 Who Are Your Decision-Makers?

- *Include people who have the information and ability to make the final call*
- *Make sure you get input from end users early in the process*
- *Don't push the project off on IT or the "computer guy"*

4 How Much Should Software Cost?

- *Know the price of a system before you test it out*
- *Look beyond the price tag when you calculate cost*
- *Don't forget to take transaction fees into account*

5

What Systems Will You Need to Combine?

- *Finding a “one-stop shop” ChMS might not be the best idea*
- *A ChMS that does everything may not do anything well*
- *It’s OK to leave operations to software outside your ChMS*

6

What Data Might Be Lost in the Conversion Process?

- *Consider upfront what data you want to bring over to your new ChMS*
- *Think about what it would mean for your team to lose previous data*
- *What are the hidden costs of not having all your data in one place?*

7

What Is Your Timeframe for Making the Switch?

- *Make sure you share your timeline with software sales teams*
- *Remember your decision dates and go-live dates are different*
- *Include room in your time frame for system acclimation*

8

Can You Trust a Software Salesperson?

- *When buying a ChMS, use your salesperson as a resource*
- *Don’t be afraid to ask them the hard questions*
- *Set and define clear boundaries for communication*

9

What Resources Will You Need to Make the Switch?

- *Find out how each system will ensure that your church has a good experience*
- *Get a clear picture of what support “looks like” with each system*
- *Consider the sales relationship as an indicator of customer service*

10

Is Switching Really Worth the Hassle?

- *Your ChMS touches every person who walks through your doors*
- *If you don’t find a better system than what you have, that’s OK*
- *If a system can help you reach more people, it’s absolutely worth it*

By asking (and answering) these questions up front, you will prepare your church to go out and find the right software to meet your specific needs in the most efficient way possible. This will help make a trying process a little less trying—and will increase your chances of success.

**GOOD LUCK ON
YOUR JOURNEY!**

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