



Parks & Recreation Software
Must-Have Checklist



Perfect**Mind**

INTRODUCTION

Change is hard, and now that you have committed yourself, you need to make the right change!

Not only is changing your software a significant investment in time and resources, but the system you choose will have an enormous impact on daily activities and the long-term results for your organization. Therefore, it is important to conduct proper research and ask the right questions when evaluating options to ensure you find your perfect solution.

There are many considerations for identifying and selecting the right software for your needs and goals. To help you out we have compiled this complete list of must-haves to complement what you may already know you need.

THIS LIST WILL COVER THE TOP FEATURE REQUIREMENTS FOR

- 1. Registration**
- 2. Facility Booking**
- 3. Website & Online Registration**
- 4. Additional Features**
- 5. Marketing**
- 6. Integration**
- 7. Security**
- 8. Platform**
- 9. Services**
- 10. Vendor**

1. REGISTRATION

Four types of activity registration: course booking, private booking, drop-in registration and flexible registration

Yes

No

Ability to look at all Instructors' Private Bookings in a side-by-side view

Yes

No

Ability to view staff schedules in a master calendar

Yes

No

Empower staff to make their own schedule of availability for vacations and time off

Yes

No

Conflict management complete with resolution intelligence that gives you the ability to change one or all conflicts if needed, (Staff, Facility, Date and/or Time), allowing you the flexibility to make changes to events with conflicts

Yes

No

2. FACILITY BOOKING

Ability to associate functions/services to predefined facilities to save time when finding the right facility for booking

Yes

No

Ability to view facilities side-by-side in your master calendar

Yes

No

Drag-and-drop functionality to allow staff to easily change an event's start time, length or facility

Yes

No

Ability to add additional items, such as deposits, equipment (laptops, chairs, tables) or even specific products for sale to each booking

Yes

No

Dependant facility intelligence: the ability to book a partial area of a larger facility, as well as dependant facility management (when facility A gets booked, make the facility B in the master calendar also unavailable)

Yes

No

2. FACILITY BOOKING

- | | | |
|---|------------------------------|-----------------------------|
| Capacity management based on facility setup | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Contract management | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Solution can sync with iCal, Outlook and other calendars | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Integrated task manager to create reminders for staff members and the ability to auto-create tasks/reminders using workflow reminders | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

3. WEBSITE AND ONLINE REGISTRATION

- | | | |
|---|------------------------------|-----------------------------|
| Allow for all types of registration (Including Courses, Private Booking, Drop-in registration as well as Flexible registration.) | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Wizard-based registration system for members | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Social media integration with Social Sign-On/Facebook Login for ease of use, and add-ons for Facebook when registering for an activity | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Online shopping cart that supports various sale and payment plans, including membership sales, and is fully-integrated with your back- office POS | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Built-in community driven application to assist in driving traffic to your website | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Responsive design for booking engine and web applications | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

4. SUGGESTED EXTRAS & ADDITIONAL FEATURES

Ability to associate multiple memberships per client

Yes

No

Ability to associate multiple programs per client

Yes

No

Allows for program levels/ranks
(ex. swimming levels, dance levels)

Yes

No

Automated task creation that is driven by business workflow rules

Yes

No

Supports pro-rata refunds, credits and cancellations, adjustable by amounts

Yes

No

Smart family and client management:

- includes broken-family and blended-family management, and is able to easily switch children from parent to parent
- can define the relationship between people
- can manage shared and individual membership
- ability to store more than one finance account for parents

Yes

No

Strong folder and document management in the cloud
(supports all document management needs, such as printing waivers, forms, certificates or terms and conditions)

Yes

No

Complete view of each member's activity such as signed waivers (stored online), and email history (sent, open, bounced, clicks), future booking, notes and transactions

Yes

No

5. AUTOMATED MARKETING FEATURES

Built-in email solution to streamline marketing of programs, campaigns and personalized operation emails

Yes

No

Smart-list management: to auto-create client lists to segment contacts using custom criteria (such as payments due, all women, over 18, currently enrolled in a yoga class, etc.)

Yes

No

Campaign management

Yes

No

Integrated voice broadcast application, supporting group calls (ex. for course alerts or notifications like cancellations due to weather)

Yes

No

Integrated text messaging and reminders (i.e. reminders for appointments)

Yes

No

CMS and landing pages for complete integration into existing websites

Yes

No

SEO management features to improve your ranking on search engines like Google

Yes

No

Detailed reporting to measure your marketing and advertising activities and results

Yes

No

Ability to personalize all outgoing emails and print mail with your members' information (using merge fields from database information, such as first name, last course taken, registration date, etc.)

Yes

No

6. INTEGRATION

Ability to integrate into your accounting software

 Yes No

Ability to integrate into any third-party software used by your organization

 Yes No

Ability to maintain existing merchant accounts

 Yes No

No restrictions on merchant account vendors

 Yes No

7. SECURITY

Ability to create role-based as well as profile-based permissions

 Yes No

Ability to create application access level permissions based on staff profiles

 Yes No

Ability to create record based access level permissions for higher security

 Yes No

Audit log to view all activity in your database

 Yes No

Ability to control access level by IP, day of the week, or time of day

 Yes No

8. PLATFORM

- | | | |
|---|------------------------------|-----------------------------|
| Secure cloud-based platform on a solid cloud infrastructure | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Built-in proprietary reporting engine to help you create and customize your reports | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Workflow engine that helps your organization define and create your own business processes | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Multi-location CRM that manages all aspects of your operations, including registrations | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Open restful API's to facilitate integration with any third party application including your own mobile apps (if available) | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Access to your own database in the cloud | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Ability to extend and customize your application if needed | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| User-friendly so staff and members don't need to spend much time learning how to use the system | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Software that adapts to your processes and your organizational needs | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Maximum of 3 clicks to perform almost any action, including: adding a member, renewing a member, booking a facility and booking an activity | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| A platform as a service that adapts to your organization need by continuously improving features and functionalities that could improve your business processes | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

9. SERVICES

- | | | |
|--|------------------------------|-----------------------------|
| 24-hour live support | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Dedicated account manager or an assigned success coach | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Onsite training, video training, as well as on-going online training | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

10. VENDOR

Vendor with experience and maturity in the cloud space

Yes

No

Vendor has a system in place to accept feedback for product enhancements through existing channels to act on customer requests

Yes

No

Understands the long-term cost impact related to different pricing models (ex. transaction-based vs. usage-based)

Yes

No

Vendors with some experience in the private sector can bring additional unexpected value

Yes

No

Don't settle for anything but the best...
or you will regret it over the next 10 years.

Still have questions about changing your software?

Email us at recreation@perfectmind.com or give us a call at **1-877-818-1017** and we will be happy to help you.



PerfectMind

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About PerfectMind:

PerfectMind makes the world's leading member management solutions. Founded over a decade ago, PerfectMind offers the industry's first Platform-as-a-Service (PaaS) solution that helps communities and municipalities of all sizes to manage and grow their organization from an easy-to-use cloud-based interface. PerfectMind empowers organizations to drive healthy customer relationships, instantly access real-time data to make informed decisions, and provides the required stability and flexibility to grow with each organization's evolving needs.

For more information visit <http://parks.perfectmind.com>