DIOCESE EDITION

The Complete Project Manager's Guide to

SELECTING A NEW RELATIONSHIP MANAGEMENT SYSTEM

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EXECUTIVE SUMMARY

This guide provides a practical and structured roadmap for selecting a new relationship management platform for Catholic dioceses. Designed for busy administrators and decision-makers, it outlines the key steps and considerations needed to evaluate and adopt a platform that meets current operational needs, accommodates future growth, and aligns with the strategic vision of parish or diocesan leadership.

Looking for a less detailed guide to share with your team?
Check out *Finding the Right System: A Practical Guide for Parishes and Dioceses*.

A robust relationship management platform serves as the central repository for essential information, ranging from parishioner demographics to sacramental records, contributions, and event participation. It ensures accuracy, fosters communication, and helps parishes and dioceses better serve their communities. This guide addresses the process of moving from disconnected, inefficient tools (e.g., spreadsheets or outdated systems) to an integrated platform that can serve as a "single source of truth" for all data.

Key steps include:

1. **Identifying Stakeholders and Requirements:** Involving key staff and volunteers early on is essential to understanding their data needs and creating a list of prioritized system requirements. This ensures the selected platform meets the diverse needs of communications, finance, religious education, and other departments.
2. **Budgeting and Financial Planning:** Evaluating both current and projected expenses, including one-time costs (data migration, training) and recurring charges (subscriptions, support), is crucial. It's important to match expectations to available funds while also considering potential funding from benefactors.
3. **Establishing a Selection Team:** Form a Software Selection Committee of trusted advisors who will evaluate the platforms and present a final recommendation to decision-makers, typically the pastor, business administrator, bishop, or vicar general.
4. **Evaluating and Short-listing Vendors:** Research and short-list vendors based on key requirements, ensuring they offer essential features like integrated communications, financial management, and support for religious education. Vendor evaluations should also account for long-term partnership stability, support availability, and alignment with church mission and values.
5. **Demonstrations and Trials:** Schedule vendor demonstrations, allowing each department to assess the platform's specific features. Hands-on trials are recommended to ensure the platform is easy to use and meets the organization's needs.
6. **Final Decision and Approval:** Once the best options have been evaluated, a scoring methodology can be used to objectively compare platforms and make a final recommendation to leadership. Engaging all stakeholders throughout the process ensures buy-in and smooth implementation.

By following this process, parishes and dioceses can select a relationship management platform that enhances operational efficiency, supports ministry outreach, and adapts to future needs, fostering deeper engagement with their communities.

INTRODUCTION

OVERVIEW OF A RELATIONSHIP MANAGEMENT PLATFORM

Ideally, your relationship management platform acts as the single source of truth in a stand-alone configuration or the central hub in an interconnected solution. It houses your current and historical data and facilitates the reporting and analytics to support smart decision-making. It will enable tailored, personal ministry that helps the individual to engage more deeply, experience love from the church more fully, and ultimately draw closer to Jesus through their life in the church.

Practically speaking, it houses information about current and past households, individuals, groups, meetings, events, registrations, sacramental details, contributions, pledges, and related data.

> Acts 20:28
>
> ***"Be on guard for yourselves and for all the flock, among which the Holy Spirit has made you overseers, to shepherd the church of God which He purchased with His own blood."***

A Bishop is responsible for all souls in their diocese. Each pastor is responsible for all souls in their parish. One of the first steps is to establish and maintain a census. We'll examine how a typical parish evolves its data usage.

Keeping accurate records is essential for the efficient management of a parish. For a very small parish, this may be accomplished with simple paper records, which could be easily damaged, misplaced, or lost. As the needs evolve and there is a desire to categorize, sort, and filter different types of data, the parish may graduate to simple digital tools such as using a spreadsheet or even a custom database. This may be acceptable when a single person is responsible for relationship management, but quickly becomes unwieldy when several staff members are involved.

Many parishes go through an evolutionary process where different staff members and group leaders initially maintain their own repositories of information, which leads to disconnected islands of information. Challenges begin to arise when basic contact information is maintained independently.

For example: Parishioner Joe informs group leader Bob that his email address has changed. Bob promptly changes the email address in HIS records, and perhaps he notifies Susan, the parish secretary. But Bob is unaware of the several other staff members who are maintaining their own lists for their own purposes. Joe assumes "the church" has Bob's updated information, but the reality is that several other groups and teams still have his outdated information.

Relying on each staff member to know all of the nooks and crannies where information is being squirreled away is a recipe for disaster and sets the system up for failure from the beginning.

In the next evolutionary phase, the parish may graduate from simple digital tools such as spreadsheets and custom databases to a commercially available Church Management System (ChMS). While this can be a step in the right direction, it takes leadership and vision to ensure that the system is fully implemented and that staff commit to using a centralized system. Problems arise if the chosen system can't adequately address the needs of different staff members, and the solution can't be augmented to handle new capabilities. Staff are again forced to seek out additional tools to augment the new ChMS.

Here are some simple questions to assess if a parish might be in this situation. Ask each staff member:

1. **What tools do you use to do your job?**
2. **Of these tools, do any of them automatically synchronize information between systems, or do you have to manually update the same information in multiple systems?**
3. **How much time do you spend each week managing data between different systems?**

Likewise, you'll want to ask these questions of the diocesan staff as well.

Keep the first question deliberately vague. Let the staff member explore both digital and analog tools that they might use. The second question is attempting to assess the interoperability between the tools in use. The third question is intended to quantify the time lost using the current systems.

Even if you have a commercial ChMS, you may find that staff are using multiple tools to manage the main database, communicate (letters, text messages, email), gather information online, integrate with your website, etc.

By using a Relationship Management Platform, you can ensure that your data, tasks, and processes intelligently work together to make more efficient use of staff time and enable more ministry with less effort.

ASSESSING NEEDS AND OBJECTIVES

IDENTIFYING KEY STAKEHOLDERS

First, you need to identify who is important, how they do their work today, and what they do to accomplish ministry today.

One of your first steps is to identify all of the stakeholders. Who manages information in any capacity at the diocese?

Once you have identified these individuals and listed their names, roles, and titles, ask the following questions:

- Do they produce information?
- Do they consume information?
- What would be the impact of this individual working with incomplete or incorrect information?

Once you have an understanding of who is involved with data in the church and how their data decisions impact ministry you'll have a better idea of who the key stakeholders are. You'll then need to decide what their roles and responsibilities are in the decision-making process.

As you engage with stakeholders, you need to understand what they do and how they do it. Don't stop there. This is a great opportunity for some critical thinking. Strive to answer why they do the things they do.

DEFINING REQUIREMENTS

After the key stakeholders have been identified you can start to prepare the requirements for a new system. Encourage stakeholders to start by expressing the outcomes that would be meaningful to them.

From the list of outcomes, create more specific goals. Then let the goals define the specific relationship management needs. These become the requirements. Prioritize each requirement as essential (must-have item), desirable (significant, but not necessarily a deal-breaker), or optional (nice to have).

No one system may have all of the things you are looking for, so it is helpful to identify what you absolutely must have versus what would make your life easier or would be nice to have. Later in the decision-making process, you can eliminate vendors that don't meet your minimum requirements.

Let's look at an example. Carol is the Director of Communications. She produces information as she regularly prepares beautiful communications to parishioners. She is also a consumer of information, gathering facts and statistics for publishing in the bulletin, website, social media, and other forms.

Carol manages a separate system that is used to manage various publications such as the diocesan newspaper, the bishop's quarterly email, and the faith formation catechist news list. It does not connect to the existing ChMS used to manage the list of parishioners.

Some identified risks include not having the email addresses of the most recently registered parishioners, not reliably getting email changes from all group leaders, resulting in some parishioners not being adequately informed about parish activities, and reduced attendance at events.

For Carol, her ideal outcome would be to improve communications.

Her goals are to have a unified system that includes the ability to create meaningful communications, manage various publications, target any subset of the parish for messages, and be connected to the main census database that all staff members jointly maintain.

Her specific requirements for the system include managing contact details like name, address, email, and mobile phone. Additionally, she needs the ability to:

- Send HTML emails
- Sent SMS text messages
- Print mailing labels and personalized letters
- Manage lists of publications and parishioner subscriptions
- Target specific groups of individuals
- Send messages to parents of selected children, even when they are in different households
- Send automated messages in response to activity in the system

For each identified requirement, she prioritizes each as essential for her role, except the last one, which she marks as optional. It would save her some time if it were available, but she could live without it. Without these essential items, she would likely continue using her existing process.

Looking for a list of common ChMS requirements?
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BUDGET CONSIDERATIONS

At some point you will need to have some realistic conversations about the budget. A great solution is likely to have some costs associated with it so be prepared and plan accordingly.

Start by analyzing the current situation. Determine the annual cost of each tool your staff is currently using. Note if there is a contract and the renewal date.

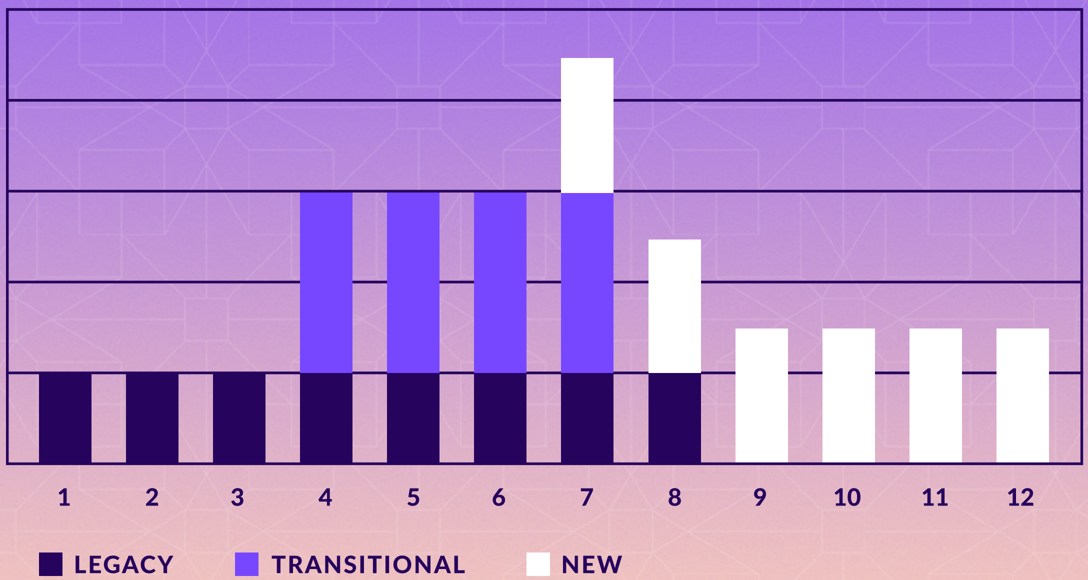
Next, discuss how much your diocese can realistically afford. Make sure the expectations align with reality. If you have caviar tastes and a peanut butter budget, something is going to have to give.

Don't assume that your existing budget defines the limit of what the new solution might cost. It's possible that budgets can be realigned or additional funding sources can be identified. Perhaps there is a benefactor willing to fund a new solution if they are carefully approached and the situation is explained to them. Money can be found in a variety of ways. Don't be afraid to be creative.

As you start exploring a new solution, keep in mind that your costs will typically fall into two categories: one-time expenses and recurring charges. You'll typically encounter one-time costs for things like data migrations and training/coaching. Recurring costs will occur monthly or annually and may include ongoing expenses such as updates, subscriptions, or support. When working with vendors, make sure to clarify which fees are one-time versus those that are recurring.

Realize that platform changes will cause some irregularity to your budget. As you switch from one set of tools to another, you may not be able to migrate everything at once, which could result in a brief overlap where you're paying for both old and new tools. Additionally, one-time costs often arise during the transition, so it's important to plan for potential budget fluctuations during this period.

Many organizations can expect to experience a scenario like this. You begin the process with a relatively stable set of (Legacy) expenses. There is then a spike during the transition period when the one-time (Transitional) expenses are realized. Finally, things resolve into a relatively stable set of (New) expenses.



ESTABLISHING THE SELECTION TEAM

Proverbs 11:14

"Where there is no guidance, a people falls,
but in an abundance of counselors there is safety."

There are many ways to go about the process of selecting a new solution. In the end, you'll be most successful if the stakeholders feel that their voices were heard. One way to ensure this is to involve them in the process.

CHOOSING THE PEOPLE

The reality is that one person should have the authority to give the final approval and go-ahead for any project. Typically, this would be the bishop, chancellor, or vicar general. Hopefully, they are seeking the advice and guidance of a team of individuals who are tasked with fully understanding the problems at hand and investigating the options.

It is common to form a Software Selection Committee made up of a set of trusted advisors. They need not know everything about the topics discussed, but they need to have an open mind and be willing to evaluate the pros and cons of the various options under consideration. The committee is tasked with making a final recommendation and presenting it to the decision-maker.

The committee may include some or all of the previously identified stakeholders, depending on their role and experience.

CASTING THE VISION

As we transition from primarily one person doing the work, perhaps you, to many individuals, take a moment to clarify your vision and share it frequently with the team. Some aspects of this process can take time and be tedious. Give them some emotional fuel for the journey.

Remind them that a new relationship management platform can be transformative and lead to new outcomes that are not possible with your current processes.

Ideally, the vision shared with the selection team will align with the broader mission defined by the bishop.

- Write it down so there is clarity, and it doesn't change.
- Print it out so that it is visible.
- Share it repeatedly so everyone remembers why you are embarking on this journey.

EVALUATING PLATFORM OPTIONS

Once you have a better understanding of the tools you currently use, what you are currently paying, and have a realistic budget, it is time to begin the search.

RESEARCH AND SHORT-LISTING

Start with some of the people you know and trust. Reach out to your contacts at similarly sized dioceses to inquire what ChMS they use and what they like and dislike about it.

Form relationships with individuals associated with related groups and communities such as the Diocesan Information Solutions Community (DISC), the International Catholic Stewardship Council. (ICSC), LA Religious Education Congress, Rebuilt Parish, Amazing Parish, Divine Renovation, or similar programs and movements that support ministry.

Explain the pains and challenges that you are experiencing related to data, and ask them to make a recommendation or two and to share why they think the solution would be a good fit for you. The more people you talk to, the more opinions you'll have, and hopefully, you'll start to hear some patterns and some recurring names. Don't assume that the best solution will be one of these recommendations, but it will give you a realistic starting point.

KEY FEATURES TO CONSIDER

Building on the previous staff research where you identified their objectives and needs, list the types of features necessary to support this. Develop a list of questions in a spreadsheet that you can easily share with vendors.

Not every vendor may have an answer for every feature request. Typical responses include:

- Yes - that feature is available
- Some - The solution does some of the desired functionality
- Roadmap - The solution doesn't currently offer this, but they are planning to offer it in the future
- No - that feature is NOT available

Looking for a list of common ChMS requirements?

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Remove questions that don't apply to your situation and add additional questions that may be unique to your needs.

VENDOR EVALUATION

Next, you'll need to start to evaluate the company selection criteria that are important to you. Some key considerations for you to consider:

Is the company private or public?

This is important because you need to understand the financial interests of your potential ministry partner. If the company is controlled by private equity, the return on investment to the investors is likely their primary concern. This can result in day-to-day decisions that are focused on maximizing revenue or containing costs, which can negatively impact customer experiences. Publicly-traded companies are also commonly chasing profits for the current quarter. On the other hand, private companies have the freedom to chart their own course freely without a sole focus on profitability.

How long has the company existed?

You're looking for a stable ministry partner. New companies often have "whiz-bang" fancy new products. You have to question if they'll be able to stand the test of time. Look for an established company with a proven track record.

How big is the company?

There isn't a perfect size, but you should understand if you are dealing with a one or two-person shop, just a handful of people, 21-50, 51-100, 101-500, 500+. The smaller the team the greater the impact of losing key individuals.

Where is the company located?

You'll have to decide if working with a US-based company is significant.

Where is the support team located?

Be aware that practical communication barriers may arise if the support team is located offshore.

What types of support are available?

Support options may include phone, ticketing systems, email, and chat. It's also important to know the hours during which you can contact support.

What training options are available?

Training may be offered in various formats, including in-person sessions, virtual training, bootcamps, webinars, self-paced courses, and conferences. It's important to consider whether these options align with your staff's preferences.

What is their key business?

Is serving the church their primary business, or just one of the things they do?

Does the company publish case studies or testimonials?

Verify that there are plenty of happy customers willing to share their experiences. If they are not readily available on their website, ask for endorsements and references.

CONTACTING THE VENDORS

You've done the research, determined what is important, and prepared your evaluation tools. Now it's time to start contacting vendors. In a formal process, this is done using a *Request For Proposal* (RFP). This document explains exactly who you are, lists your challenges and values, and lays out expectations of the solution you desire.

Include a cover letter that introduces your diocese. Provide some background about its location, size, and history, and include a key contact for the RFP.

The RFP should also have a timeline that includes:

- Clarifying Questions Deadline - If the vendor has questions about anything in the proposal, when should they submit them?
- Answer Window - When can vendors expect to receive answers to their questions? Be sure to allow sufficient time between providing clarification and the final due date.
- Response Deadline - When is the final RFP response expected?
- Vendor Evaluation Window - How long do you plan to evaluate the proposals?
- Schedule for Demonstrations - If selected for demonstrations, when are they likely to take place?
- Venue - Will demonstrations be conducted virtually or in person?
- Final Selection - When will the final selection take place?

Finally, include the details of what you are looking for. These are commonly provided as a spreadsheet. Prepare a set of documents for each vendor that includes the cover letter and supporting documents.

Keep a list of all RFP's sent and include key information such as

- Vendor Name
- Contact Name
- Contact Position
- Email
- Phone Number
- Date Sent
- Date Response Received
- Notes
- Primary Reason for Disqualification - When the selection process is complete, there should be one remaining vendor that you choose to proceed with. For all others, make a note of the primary reason they were eliminated from the selection.

Some vendors may not respond, or will provide a negative response indicating that their solution doesn't meet the minimum requirements presented, or they don't feel that their solution is a good fit for your church. You can quickly cross these off your evaluation list and focus on the remaining submissions.

RESULTS ANALYSIS

Now it's time to begin reviewing the responses. Your goal is to eliminate between 25-50% of the vendors in the first round. This will enable you to spend more time exploring the details of the best-suited options that remain.

Review each of the remaining proposal responses. Flag any responses that don't satisfactorily answer the question.

After reviewing all of the responses for all of the vendors, make a second pass with a pass/fail mentality. Is RFP Response compelling enough to continue the evaluation process?

Of the vendors you want to proceed with, reach out to the vendors and get clarifying answers to all of the questions flagged in the previous step.

DEMONSTRATIONS AND TRIALS

Once you have eliminated potential contenders that don't appear to be a good fit it is time to start taking a closer look at the remaining solutions. In this step you'll be scheduling one or more introductory demonstrations, typically 30-90 minutes each. The goal now is to eliminate 25-50% of the remaining candidates.

At the end of the introductory demonstrations, you should have only a few remaining candidates. These are the candidates you'll want to focus on for more in-depth demonstrations and a closer evaluation of their solutions.

Remember, it may be difficult to find a perfect solution. The goal is to find the best solution that is available that meets your budget.

As you go through the demonstration process, take a moment after each demo to assess the pros and cons of each solution. Be sure that everyone participating in the decision-making process is involved in this evaluation.

REQUESTING DEMOS

For vendors still in the selection process, it is time to start taking a closer look. You'll want to set up at least one and perhaps several demonstrations to explore various aspects of the solution. There may be a temptation to try to do everything all in one meeting, but you risk meeting overload if participants are forced to attend lengthy, in-depth presentations that include aspects of the solution not relevant to their role. This is compounded if you try to schedule demonstrations from multiple vendors on the same day. Instead, consider inviting everyone on the selection team to a shorter introductory demonstration and then have subsequent demonstrations with fewer participants to focus on features pertaining directly to their role.

For example, you might have a series of demonstrations such as:

DEMONSTRATION	AUDIENCE
Introduction	Everyone
Messaging	Communications Team
Contributions	Finance Team
Faith Formation	Religious Education Team

This enables participants to know they'll have sufficient time to explore potential solutions for their key concerns, and they aren't wasting time learning about features not relevant to their role.

Decide on the core groups first and then schedule your demonstrations accordingly.

Prior to each demonstration, remind the participants to make notes about the perceived pros and cons. Afterward, provide a way for participants to share their insights and concerns with the group. Follow up with the vendor to give them an opportunity to clarify any concerns the team raised.

Remind the participants to keep an open mind about solving old problems in new ways. Sometimes questions arise based on the perspective of the current solution in use. Other vendors may have chosen to tackle the problem in new and different ways. So, just because the new solution doesn't do things the same way, the new way may be significantly better. Be open to doing things in new ways!

After each round of demonstrations, do a quick poll of the participants.

Should we continue to evaluate this solution?

If the predominant answer to this question is "No," then you have eliminated this vendor.
Make a note of the primary reasons for disqualification in your tracking spreadsheet.

Have we seen enough to make a quality decision that we're willing to stand behind?

If the predominant answer to the second question is "Yes," then you've arrived at a pivotal point.
You're ready to make a recommendation to the ultimate decision-maker.

CONDUCTING TRIALS

At the end of the selection process, you may wish to invite some stakeholders to participate in a trial of the proposed solution(s). This will enable them to get some hands-on experience with the features that are important to them.

Not all vendors offer trials. While they may have pre-recorded videos, webinars, or other materials that may be helpful, these do not provide the same experience as trying the solution yourself. Ask for a trial and take advantage of it.

A word of warning regarding trials. Any new solution will be unfamiliar to your staff, so avoid concluding that something is difficult just because it functions differently from your current system. Trials provide an excellent opportunity to engage with the vendor and seek clarification on any issues raised by participants. Being in an unfamiliar environment may help spur conversation related to the training options that are available.

Like during the demonstrations, the participants during the trial period should be prepared to make assessments and share conclusions throughout the trial period. Wait until the end of the decided trial before coming to a final conclusion.

Come back to the same key questions identified during the demonstration process.

- Should we continue to evaluate this solution?
- Have we seen enough to make a quality decision that we're willing to stand behind?

DECISION MAKING

If you've gone through the process outlined in this guide, you'll typically end up with two or three finalists. Sometimes, one solution emerges as a clear winner, and you can conclude with your recommendation rapidly. Other times, you'll need to score the vendors to determine the winner.

Objectively scoring the vendors ensures that items are evaluated consistently across the vendors. Below is one such example of a scoring methodology. Feel free to use this model or come up with your own. Just remember to be objective and measure the options fairly according to your needs.

COMPARING OPTIONS

Coming up with a score may sound like a challenge, but it is easily accomplished once you develop a methodology. Bonus points for those of you who used a spreadsheet to create your list of requirements! You can easily add some columns to those forms to help you with the calculations.

First, realize that not all features are equally important. Recall that you assigned a priority to each of the requirements. You could assign a numerical value to each priority. For example, on a 5-point scale, you could assign:

PRIORITY	VALUE
Essential	**5**
Desirable	**3**
Optional	**1**

In this scenario, something that is deemed essential carries 5 times the weight of something that is optional. (Feel free to use different values here. These are just examples.) Just assign the essential value with the highest number. The optional items should have the lowest value, and the desirable value should be something in between. All values should be positive and greater than zero.

You'll also need to evaluate your requirements. Were the number of essential, desirable, and optional items fairly distributed, or was one category significantly overrepresented? If so, you may wish to adjust the scale of values.

Second, you'll want to assign some numerical values to the vendor responses to the requirements.

VENDOR RESPONSE	VALUE
Yes	10
Some	7
Roadmap - within 6 months	2
Roadmap - > than 6 months	1
No	0

The Yes response, indicating that the feature is fully supported, should have the highest value.

The No response, indicating that the feature is not available, should be represented with a zero.

The other responses should be somewhere in between.

Now it is a simple calculation to score each row representing a requirement.

Requirement Score = Priority.Value * Response.Value

Using the values supplied above, a score matrix would look like this.

VENDOR RESPONSE	ESSENTIAL	DESIRABLE	OPTIONAL
Yes	50	30	10
Some	35	21	7
Roadmap - within 6 months	10	14	2
Roadmap - > than 6 months	5	7	1
No	0	0	0

Each requirement now has a score. Simply calculate the sum of all requirement rows to calculate a requirements score for each vendor. In this model, each row would receive a score somewhere between 0 and 50.

Similarly, you can create a scoring matrix around the Vendor Evaluation questions and use that to calculate a Vendor Evaluation score.

MAKING THE FINAL DECISION

Once you have scored the vendors, compare the results for each of the finalists. Gather the selection committee to review the results and decide if you are ready to make a recommendation.

At this point, the selection committee may have been working together for weeks (if not months) and should be comfortable sharing their thoughts.

A few standard outcomes are likely.

1. **One solution has emerged as clearly superior, and the committee agrees - you're ready to make a recommendation.**
2. **Two or more solutions are very closely scored, and there is initial disagreement about the finalist - conduct rounds of voting, eliminating the lowest ranked (by vote) after each round until the finalist emerges.**
3. **Two finalists emerge, and the committee is unable to come to a conclusion - consider inviting the vendors back to make a final presentation and try again.**

OBTAINING APPROVAL

Once the committee has reached a consensus, it is typically time to make a recommendation to the bishop, chancellor, or vicar general (decision-maker). This is commonly done as one or more of the following:

- Written Report
- Presentation
- In-Person Meeting

All should aim to document the following:

- A concise summary of the reasons for evaluating a new solution
- The key challenges currently faced by stakeholders
- The process used to evaluate options
- The time invested in the evaluation process
- How the proposed solution addresses the key challenges identified
- A clear recommendation of the chosen solution
- A request for a decisive answer, commitment from leadership, and sufficient budget funding

DISCUSSING FINDINGS WITH STAKEHOLDERS

If all stakeholders identified at the beginning of this process were NOT involved in the selection committee, take some time to share with them how their views were represented during the selection process. Taking their views and values into consideration will help in the adoption phase, even if they weren't directly involved with the decision-making.

CONCLUSION

Dozens of dioceses have gone through the software evaluation process. However, they typically only do it once every several years, if not decades. As such, most people haven't been through this process before, or if they have, not recently.

We hope you found this guide informative and helpful, and that it serves as a useful foundation for evaluating platform changes.

Here are some important things to remember:

- Remember that there may not be a perfect software solution. Strive to find the best solution that meets your needs and budget.
- This process takes time. If you rush it, you may end up disappointed. Avoid taking shortcuts.
- Repeatedly engage stakeholders and keep them informed of the progress.
- Strive to understand WHY stakeholders do things, and not just WHAT and HOW they do them today.
- Allow for growth. Ensuring that your new platform meets your current needs is important, but be sure to look ahead to the "unknowns of the future." Be sure your solution has the ability to adapt as needed, or you'll find yourself repeating this process again as new requirements are identified.
- Find a great partner. The vendor you choose is just as important as the solution. Knowing they'll be there to support you over the long haul will be critical to your success.

A well-chosen relationship management platform will serve to meet the diverse needs of many departments and staff. It should facilitate the consolidation of many disparate solutions into one and be equipped to handle the known needs of today and the unknown needs of the future.

May the Holy Spirit guide your selection process to meet the needs of your parish or diocese.

God Bless

ABOUT THE AUTHOR

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