



Finding the Right System:

A PRACTICAL GUIDE

FOR PARISHES AND DIOCESES

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INTRODUCTION

This guide is here to help you choose the best relationship management platform for your Catholic parish or diocese. Whether you're dealing with an old system, facing problems with current tools, or just curious about what's available, you don't need to start from scratch. We've got you covered with easy steps, simple explanations, and useful tips to get the right system in place.

WHAT'S A RELATIONSHIP MANAGEMENT PLATFORM?

Think of a relationship management platform as the central hub for your parish or diocese's information—everything from parishioner contact details to sacramental records, contributions, events, and more. It helps your parish or diocese keep track of who's who, what's happening, communicate effectively, and make decisions that strengthen the parish community. With the right platform, you can focus on what matters most: fostering a vibrant, faith-filled environment where parishioners feel connected and supported in their spiritual journey.

WHY YOU NEED ONE

Managing parish or diocesan data can be messy, especially when multiple people keep separate lists or use different systems. For example, one staff member might update a parishioner's email in their list, but others may still have the old information. This causes confusion, poor communication, and wasted time. A good relationship management platform solves these problems by keeping everything in one place and making sure everyone is on the same page.

1

GATHER YOUR TEAM (AKA, THE STAKEHOLDERS)

The first step in this process is to identify your internal stakeholders, the people who manage or use data at your parish or diocese, and ask them:

- What tools do you use to do your job?
- Do those tools talk to each other, or do you manually update the same info in multiple places?
- How much time do you spend managing data each week?

By asking these questions, you'll learn how disconnected your current systems are and who really needs to be involved in selecting a new platform.

2

DEFINE WHAT YOU NEED

Now that you've talked to your team, it's time to figure out what you really need. Start with what each stakeholder hopes to achieve with the new platform—think big picture. Then, break it down into specific features or **requirements**. You can prioritize these as:

- **Essential** (*must-have items*)
- **Desirable** (*great to have, but not a deal-breaker*)
- **Optional** (*nice to have, but you can live without it*)

For example, if Carol in communications needs to send newsletters, emails, and texts to parishioners, her essential requirements might be:

- Managing contact info (name, email, address)
- Sending emails and texts
- Printing mailing labels
- Targeting specific groups (e.g., parents of children in faith formation)

Each of the stakeholders will have their own list of requirements, so it's important to capture this detail before moving on to the next steps.

3

BUDGETING (YES, YOU HAVE TO TALK ABOUT MONEY)

Let's get real—budget matters. Start by looking at what you're currently spending on existing tools and systems. Then, think about what you can realistically afford for a new platform. If your current budget won't cover the ideal system, it might be time to get creative—look for extra funding sources, ask about diocesan support, or approach benefactors who might be willing to help.

Remember, there are two types of costs:

- **One-time costs**, such as data migration and training
- **Recurring costs**, such as subscriptions, support, or updates

It's important to plan for both. During the transition phase, you can expect some overlap in costs when you move from old tools to the new platform.

4

BUILD YOUR SELECTION TEAM

No one should choose a new system alone. Build a **Software Selection Committee**. This group should include your key stakeholders along with some trusted advisors who can help weigh the pros and cons of different platforms. Make sure one person (likely the pastor or administrator) has final approval, but the committee should do the legwork and make the recommendation.

5

START SHOPPING FOR PLATFORMS

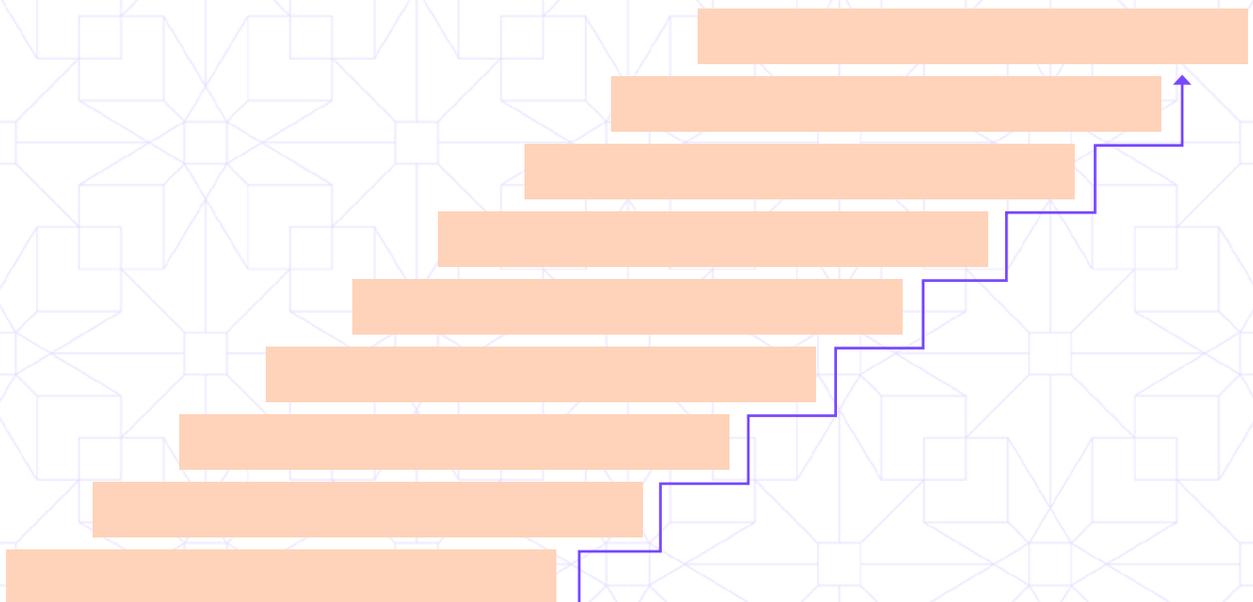
Time to explore! Ask around—other parishes or dioceses may already be using a Church Management System (ChMS) that fits your needs. Reach out to trusted groups and communities like the Diocesan Information Solutions Community (DISC), the International Catholic Stewardship Council (ICSC), or programs like Rebuilt Parish or Amazing Parish.

As you look at different platforms, ensure they can handle your **must-have** requirements. Some platforms may not have every feature you want, but they might be able to adapt or add them later. Use a simple system to track what each platform can or can't do.

6

NARROW DOWN THE OPTIONS

Once you've done your research, it's time to narrow down the list. Eliminate platforms that don't meet your essential requirements. Reach out to the remaining vendors and ask for a demonstration. These demos should walk you through how the platform will work for your specific needs.



7 TEST DRIVE WITH DEMOS & TRIALS

Demos are a great way to see the platform in action. Invite your selection team to join. Don't try to squeeze everything into one long meeting—schedule shorter, focused sessions for specific departments.

After each demo, ask your team:

- Should we continue to evaluate this solution?
- Have we seen enough to make a decision?

Some vendors may offer a trial period so you can test the platform yourself. Take advantage of this and ask lots of questions. Just remember, new systems may seem tricky at first, so give it time and ask for help if needed.

8 MAKE YOUR FINAL CHOICE

By now, you should have just a few contenders left. If one platform clearly stands out, you're ready to make your recommendation. If you're still torn between two or more options, try scoring them. For example:

- Assign points for essential, desirable, and optional features, giving essential features the most weight.
- Score vendors on their overall support, training options, and long-term stability.

Use this method to compare the platforms objectively and make your final choice.

9 GET APPROVAL AND ROLL IT OUT

Once you've made your decision, it's time to present it to the decision-maker (pastor, administrator, bishop, etc.). Prepare a simple summary that includes the following:

- Why you need a new platform
- The process you followed
- The recommended solution and why it's the best fit
- A request for approval and budget

Keeping everyone (especially stakeholders) informed throughout the process will make the adoption and transition smoother.

FINAL THOUGHTS

Remember, no platform is perfect, but the right one should meet your needs and help you grow. Take your time in the selection process, engage key stakeholders, and keep the long term in mind. A good relationship management platform will support your parish or diocese for years to come, helping you focus on what truly matters—serving your community and fostering deeper connections in the church. With the right tools in place, you'll be better equipped to foster a thriving, faith-centered parish life.

