

Evaluating Venue and Event Management Software Checklist

STAGE 1: ANALYSIS

Confirm number of potential users:

Determine your budget:

EVALUATE CURRENT STATE

What systems do you utilize daily?

What does your current system architecture look like today and why?

How would your current tech stack be affected by a new solution?

Can you share what success means to you in your current systems or workflows?

What are the top three issues that frustrate you about your current systems or workflows?

Looking at the desired state, what are you missing today that would benefit you and your team?

Have you used any other systems you thought were more effective than your current system?



STAGE 1: ANALYSIS

DEFINE GOALS

Target go live date:

Increase sales conversions

Increase venue occupancy

Streamline communications

Reduce paper wastage

Reduce manual processes

Enhance collaboration across departments and teams

What are your main drivers for changing and how do these align with your business priorities for the year/your company's strategic goals?



○ FUNCTIONALITY REQUIREMENTS

Tiered User Licenses:			
Administrators:	Mandatory	<input type="radio"/>	Desirable <input type="radio"/>
Standard Licenses (i.e., End Users)	Mandatory	<input type="radio"/>	Desirable <input type="radio"/>
Read-Only Licenses (i.e., External contractors, senior management etc.)	Mandatory	<input type="radio"/>	Desirable <input type="radio"/>
Sales and CRM:			
Outreach components	Mandatory	<input type="radio"/>	Desirable <input type="radio"/>
Referenceable data for past and historical interactions	Mandatory	<input type="radio"/>	Desirable <input type="radio"/>
Automation of outreach to clients and potential clients	Mandatory	<input type="radio"/>	Desirable <input type="radio"/>
Bookings Incl. Central Bookings Calendar	Mandatory	<input type="radio"/>	Desirable <input type="radio"/>
Event Management	Mandatory	<input type="radio"/>	Desirable <input type="radio"/>
Accounting and Revenue Management	Mandatory	<input type="radio"/>	Desirable <input type="radio"/>
Reporting & Dashboards	Mandatory	<input type="radio"/>	Desirable <input type="radio"/>
Online Inquiry Form	Mandatory	<input type="radio"/>	Desirable <input type="radio"/>
Online Bookings	Mandatory	<input type="radio"/>	Desirable <input type="radio"/>
Catering and Event Order Management	Mandatory	<input type="radio"/>	Desirable <input type="radio"/>
Inventory Management	Mandatory	<input type="radio"/>	Desirable <input type="radio"/>
Risk Management	Mandatory	<input type="radio"/>	Desirable <input type="radio"/>
Sustainability	Mandatory	<input type="radio"/>	Desirable <input type="radio"/>
Event Registration	Mandatory	<input type="radio"/>	Desirable <input type="radio"/>
Room Diagramming	Mandatory	<input type="radio"/>	Desirable <input type="radio"/>
Online Payments	Mandatory	<input type="radio"/>	Desirable <input type="radio"/>
Events Portal	Mandatory	<input type="radio"/>	Desirable <input type="radio"/>
API and Integrations	Mandatory	<input type="radio"/>	Desirable <input type="radio"/>



STAGE 2: EVALUATION

Determine if you require an off-the-shelf or customizable solution.	Off-the-shelf	<input type="radio"/>	Customizable	<input type="radio"/>
Confirm if the solution provider offers best practice advice based on industry standards.	Yes	<input type="radio"/>	No	<input type="radio"/>
Completed product demonstration		<input type="radio"/>		

DATA MIGRATION

What systems do you utilize daily?	Yes	<input type="radio"/>	No	<input type="radio"/>
What data is available for migration and import?	Yes	<input type="radio"/>	No	<input type="radio"/>
Is the data in your existing solution relevant/clean?	Yes	<input type="radio"/>	No	<input type="radio"/>
Is there an additional cost for data migration?	<input type="text"/>			
What are the roles and responsibilities on both sides to achieve the import?	<input type="text"/>			



STAGE 2: EVALUATION

INTEGRATIONS

Does the solution provider offer an open Application Program Interface (API)?

Yes

No

Do you need an integration:

Could you solve your requirements with another solution such as a scheduled report export via email or Files Transfer Protocol (FTP)?

What is the business value of integration (i.e., cost, time savings, improving data integrity, reducing manual processes for staff etc.)?

What systems need to be integrated and do you have the relevant API documentation from the 3rd party vendor?

Does the solution provider offer assistance and training in configuring integrations?

Yes

No

What applications does the solution provider currently integrate with?

If applicable, what are the costs associated with building and maintaining the required integrations?



STAGE 3: SELECTION

COMPANY REVIEW

Consider the company you will be partnering with:

Who owns the company?

Who is in their leadership team?

What are their core values?

How long has the company been in business?

Who will be your primary point of contact after the point of sale?

Does the company have experience in providing software to other clients within your industry? If so, do they have any case studies, testimonials or references available for you to review?

Do you know what their product roadmap is?

Does the company provide data hosting centers in your region and is it compliant with local data legislation and regulation?

Does the company allow you to scale with your business (i.e. do they re-invest into adding functionality or foster innovation in the industry)?



○ CONTRACT REVIEW

Licensing

- How many user licenses are included?
- What is the renewal process?

Support and Service Level Agreement

- Are there any limitations on how many hours you will be offered a month or what times support is available? If so, will this be sufficient for your organization?
- Do they offer an online help center?
- What are their target response times?
- How do they identify and define functionality issues?
- What are the solution provider's business hours?

Yes No

Customer Success

- Do they offer customer success programs?
- Do they offer adoption programs such as learning center or knowledge hubs?

Yes No
Yes No

Training

- Is training included in the quotations that you have been provided? If not, how much will this training cost and what is the proposed training schedule?
- If they do offer a help center, does this include training resources?
- How are product releases communicated for new features and enhancements to the software?



STAGE 3: SELECTION

CONTRACT REVIEW

Data Security

- Data Encrypted in Transit using secure protocols (ex: TLS 1.2)
- Data Encrypted at Rest
- SOC Type 2 Certified
- PCI DSS compliant when processing payments
- Data Location and Storage

Disaster Recovery

- Check to see that the provider conducts regular back-ups of your data to ensure no down time or data loss in the event of technical complications.
- Subscription Terms and Conditions
- What are the contract lengths?
- What are the payment terms?
- What is the termination process?
- What are the usage limits/restrictions?

Privacy Policy

- What types of personal information do they collect?
- How do they use your personal information?
- Where is your information stored?
- Do you have the right to access and correction?

Special Requirements

- If your country has special requirements, make sure these can be met by the provider.

SPEAK TO AN EXPERT