



Guidelines for Evaluating Center Management Software

by Roger Neugebauer

Remember when you had to decide between 8-track and compact cassette systems for listening to music in your 1975 Mustang? Technologies have advanced to where these systems now only exist in museums.

Likewise, the use of technology to manage an early childhood program has evolved dramatically over the past decades. But center leaders are still faced with a plethora of choices when it comes to selecting the software package that will best meet their specific needs. This article, based on the insights from the software professionals listed at the end of the article, will offer some basic

guidelines to consider in making a wise selection.

What Standard Features Should You Expect?

We have come a long way from the early days when center software simply tracked income and expenses. Now you should expect any management software option you select to include the following functions. You may not require all of these; focus on those functions that are critical for the management of your organization and that would make your life easier as a manager.

Accounting Functions

- Tracking income and expenses
- Accounts receivable management
- Accounts payable management
- Auto-billing for fees and online collection

Reporting Functions

- Balance sheet
- General ledger
- Profit and loss
- Up-to-the-minute attendance tracking/ratio calculations
- State/federal mandated reports
- Custom report creation

Child Tracking

- Basic child data (birth date, immunization dates)
- Allergies and food issues
- Relevant health records
- Medication administration
- Attendance (time in/time out) tracking

Family Tracking

- Online registration system
- Contact information
- Alternative pick-up permissions
- Emergency contact information
- Child custody/protection alerts



Roger Neugebauer is founding publisher of *Exchange Magazine* and a co-founder of the World Forum Foundation.

Employee Records

- Payroll/timekeeping system
- Personnel files
- Classroom staffing

Program Management

- Menu planning
- Curriculum planning

Prospect Tracking

- History of prospective clients (initial call, concerns, center visit date)
- Sales/prospect metrics reporting
- Lead management system
- Waiting list management

Security

- Secure levels of permissions for individuals accessing different levels of data
- Protection against spammers
- Back-up systems
- Door security system
- Classroom monitoring
- Auto mobile alerts to key staff during critical events

What Advanced Functions Might You Consider?

The line between standard and advanced features has blurred in recent years as once advanced features are incorporated into base software systems. In any case, these are additional functions well worth considering:

- **In the cloud** — hosting data away from the site by third-party cloud-based providers.
- **Multi-site management** — entering data, managing data, accessing data, reporting data on a center, regional, and organization-wide basis.
- **Registration apps** — making it easier for parents to enroll and for their data to be incorporated automatically into a database.
- **Push notifications for parents** — sending permission slips, holiday

reminders, and the like.

- **Prospects** — asking “How was your visit?”
- **Parent portal supporting parent engagement** — granting parents access to relevant data, inviting their communications.
- **Easy compatibility** with other popular programs typically used by early childhood centers.

What Options Do We Have in Paying for Software Packages?

Early childhood organizations have a variety of options when it comes to financing a management software system:

- **Upfront purchase** — client pays for software in advance, installs on system, and pays annual maintenance fee for support and updates.
- **Software as a Service (SaaS)** — client pays a monthly fee based on number of centers or number of children enrolled; support and upgrades included in monthly fee.
- **Subscription variations** — on-demand pricing (using the über approach, paying for what you use); bundled pricing (setting price based on functions selected by each user).

What Ongoing Support Should a User Expect?

Natalie Clark: “You should expect that your software vendor will provide updates necessary to stay compatible with current operating systems and other software, such as email clients and PDF writers that interface with the software. Additionally, you should be able to expect periodic bug fixes and feature

improvements.”

Cathy Fultineer: “This is the differentiator in the industry and key to a center’s success. Centers must choose a childcare management solution that offers excellent and highly responsive technical support. In most cases there will be an annual fee that will include any software updates, as well as unlimited tech support. Centers should choose a software vendor that also supplies training. Typically there is an initial amount of free training and then more is available to be purchased by the hour. Product and services innovation and responsiveness to the voice of the customer is a hallmark of a best-in-class vendor.”

Simon Ho: “SaaS users are getting the latest software each time they login, as they are all connected to the single instance of software codes. They should expect to get new releases every six weeks or so. All support and updates should be part of the monthly subscription (i.e., no extra cost).”

Luster Williams: “Users should only require support if the instructional help videos and manuals do not suffice in properly explaining how to use the product. Updates should only occur if the user has a problem with a particular component in the software that may also appear as a future problem for future users. Updates should also occur if a user presents the software creator with an idea for making the software more ideal for the user’s intentions.”

Janet Mazza: “Ask around with others to find out how often the product is updated. You don’t want a system that hasn’t been updated in five years and won’t work on the latest computers. An active system should have a major release at least once a year. Full support for your product is critical. Expect to pay for it in some way, but ensure you have quick and rapid support for

quality support when something goes wrong.”

How Should a Vendor Enable You to Evaluate Their Product?

Chuck Gibbs: “An important part of evaluating any software system is talking to the vendor to gain their knowledge and credibility within the industry, calling references to understand what is really involved with the implementation and adjustment period of using the software, and setting up a full demonstration of the system to make sure it fits within your processes and needs. Vendors often offer trial periods so that you can experience the software and make sure it delivers the benefits you are expecting for your organization.”

Frank Harms: “Prospects should have access to a trial product for them to use for a period of time. Evaluate the software in terms of ease of use. Determine how well it meets their specific needs. Providers should also publish on their website how long they have been in business and how long [they have been] serving the market. Companies should be willing to provide prospects with contact information of current users as references for the product and customer support. Companies should publish unedited customer reviews that are accessible online. Prospects should be given a product demonstration based on their specific needs. Industry KPIs such as Net Promoter Score, retention rate, [and] support calls answered live should be made available to prospects.”

Gale C. Cohen-Frank: “Get a fully functional demo with enough time and support to fully evaluate the software. If the software is not supported with training during the demo period,

the potential user cannot evaluate the usefulness of the software.”

Scott Wayman: “As the founder of a new software company, I am obsessed with NPS. The Net Promoter Score is calculated based on responses to a single question: How likely is it that you would recommend our company/product/service to a friend or colleague? The scoring for this answer is most often based on a 0-to-10 scale. Those who respond with a score of 9–10 are called Promoters, and are the super fans of your product and will tell everybody they know about the product.”

Hopefully these words of wisdom will assist you as you make the important choice of the software that you should expect to depend on in the foreseeable future to assist you in managing your early childhood organization.



Contributors

Luster Williams
Automation Plus
Memphis, Tennessee

Chuck Gibbs
Child Care CRM
Plano, Texas

Gale C. Cohen-Frank
CMSC, Ltd. – MAGGEY Software
Tucson, Arizona

Scott Wayman
Kangarootime
Long Beach, California

Natalie Clark
Minute Menu Systems, LLC
Richardson, Texas

Simon Ho
OnCare Cloud
Cupertino, California

Cathy Fultineer
Procure Software
Medford, Oregon

Frank Harms
SofterWare
Horsham, Pennsylvania

Janet Mazza
SchoolLeader Management
System
Orlando, Florida