

Recreation Software Buyer's Checklist

Compare customer experience, administration, reporting, support, and long-term fit with evidence.

01 Set the decision rules before the demos

Use one copy for each vendor. Ask every presenter to complete the same important workflows and record what you actually see. This keeps the comparison tied to your operation and gives leadership a clear basis for its decision.

Name the required outcomes

Identify your service mix: programs, camps, aquatics, facilities, memberships, leagues, events, or other community services. List three problems the new system must solve and any non-negotiable procurement, payment, accessibility, security, or integration requirement.

Rating	Evidence standard
0 - Does not meet	Required result is unavailable or not demonstrated
1 - Partly meets	A limitation or manual workaround remains
2 - Meets	The required workflow is demonstrated
3 - Strong fit	It meets the requirement and a documented extra benefit matters to your team

Mark each requirement Must, Should, or Could. Record whether it is included, configured, separately priced, or planned. Treat a planned feature as unavailable for the current decision unless its delivery is contractually agreed and fits your timetable.

Apply mandatory gates first. A high total score does not compensate for a failed must-have requirement. Resolve the gap or record an explicit exception before comparing overall scores.

Use the scorecard on page 4 after the demonstrations. Keep notes, screenshots, report samples, and proposal references as supporting evidence.

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02 Test the customer and staff experience

For each check, capture a rating and a short evidence note. Use your own sample programs, family situations, fees, and facilities wherever possible.

Customer experience

- ☐ Browse and filter programs or facilities before signing in; see clear dates, prices, and availability.
- ☐ Complete a phone-based registration for multiple household members.
- ☐ Understand eligibility rules, waitlist status, required forms, and next steps.
- ☐ Receive an understandable confirmation and find payment or account history.
- ☐ Complete essential tasks using a keyboard; review current accessibility documentation and scope.

Administration

- ☐ Create and copy a program; update dates, prices, capacity, and questions before publishing.
- ☐ Apply resident/member pricing, coupons, scholarships, and other required fee rules.
- ☐ Move a participant, manage a waitlist, and handle a cancellation or refund.
- ☐ Create groups or teams, prepare rosters, record attendance, and limit staff access.
- ☐ Send an email or SMS to the right participants and explain how replies and delivery issues are handled.

Your specialized workflows

- ☐ Facilities: demonstrate recurring bookings, conflicts, approvals, deposits, and required contracts.
- ☐ Memberships: test individual/family eligibility, term dates, renewals, and check-in.
- ☐ Sports or camps: test your group/team, schedule, capacity, and participant-information rules.

Important gap or workaround and owner

Do not equate a feature label with a completed workflow. Ask who performs each step and what happens when the usual process fails.

03 Evaluate finance and the working partnership

Reporting and financial control

- ☐ Produce the actual roster, participation, usage, and demographic reports staff need.
- ☐ Review payment status, outstanding balances, refunds, and revenue by relevant account or program.
- ☐ Reconcile a sample payment and payout, including fees and adjustments.
- ☐ Export a report and verify fields, formats, identifiers, and permissions.
- ☐ Confirm external accounting or reporting exchanges, including cost, ownership, errors, and support.

Implementation and support

- ☐ Agree what data will migrate, what will remain archived, and how acceptance is measured.
- ☐ Identify your staff effort, project owners, training plan, and delivery dependencies.
- ☐ Review test scenarios, launch approval, recovery planning, and first-day support.
- ☐ Confirm live support coverage, response targets, escalation, and additional service charges.
- ☐ Speak with a relevant reference about setup, daily use, support, and the next season.

Security and long term fit

- ☐ Review hosting, role-based access, MFA, required SSO, and supporting evidence.
- ☐ Confirm data ownership, export options, retention, and end-of-service arrangements.
- ☐ Review renewal terms, price changes, volume limits, and costs as your operation grows.
- ☐ Ask how product changes are communicated and how staff learn new workflows.

Compare equivalent proposals. Include software, migration, training, integrations, hardware, messaging, payment processing, any platform fees, and internal transition work. Ask for a three-year total using the same assumptions for each vendor.

Reference or contract question still to resolve

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04 Record the result and the next step

Choose weights before comparing vendors. The example below totals 100%; adapt it to your priorities. Score each category from 0 to 3 using the evidence standard on page 1. For a category with several applicable checks, use their average rating.

Category	Weight	Rating 0-3	Points
Customer experience	20%	_____	_____
Administration and required workflows	25%	_____	_____
Reporting and financial control	15%	_____	_____
Implementation and support	15%	_____	_____
Security and data protection	15%	_____	_____
Cost and long-term fit	10%	_____	_____
Total	100%		_____

Category points = rating ÷ 3 × weight expressed as a whole number. A rating of 2 at a 15% weight earns 10 points. Maximum total: 100. If a category does not apply, redistribute its weight consistently across all vendors before scoring.

Final decision record

- ☐ Every must-have requirement passed or a named approver accepted the exception.
- ☐ Quoted scope matches the demonstrated configuration and required services.
- ☐ Costs, contract terms, timeline, data handling, and support reviewed.

Recommendation and principal reason

Unresolved item and required decision date

Bring this checklist to Cogran

Cogran combines registration, facilities, memberships, sports, camps, attendance, communications, payments, and reporting. Bring a sample workflow and your most important report to the demo so your team can evaluate the fit in context.

Schedule your personalized demo | hello@cogransystems.com | 1-800-985-9342