

Choosing the Right Collections Management System



5 Steps to an Effective Selection Process

Selecting the right Collections Management System (CMS) is a critical decision, whether you are acquiring your first system or upgrading from an existing solution. Your CMS serves as a cornerstone for collection care and has a significant impact on every department within your organization.

A well-chosen CMS brings a host of benefits, including:

- **Optimized Efficiency:** Streamline processes, reduce manual tasks, and improve productivity across teams.
- **Enhanced Workflows and Collaboration:** Break down silos and foster seamless communication between departments.
- **Increased Accessibility:** Improve access to collections for staff and communities, boosting engagement and service delivery.
- **Improved Collection Care:** Digitally store conservation data and images for better preservation and management.
- **Future-Proofing Growth:** Lay the foundation for scalable solutions that evolve with your institution and adhere to industry standards.

Like any significant investment, selecting a CMS requires careful research and planning. To help guide your decision-making process, we've outlined key steps to ensure a successful outcome.

Step 1: Identify Your Selection Team

To ensure a successful CMS selection, it is essential to identify and involve key stakeholders early in the process. These individuals will play a critical role not only in the decision-making process but also in the implementation, ongoing maintenance, and day-to-day use of the system.

Gaining their input and securing their support will be vital for the long-term success of your CMS initiative.

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We recommend that your selection team includes, but is not limited to, the following key members:



Collection Manager/Head of Collections

Leads collection strategy and ensures the CMS meets collection goals.



Head Registrar

Manages collection data and ensures efficient tracking and reporting.



Executive Director

Aligns the CMS with organizational priorities and resources.



IT Manager

Oversees technical integration, security, and system compatibility.



Database Administrator

Manages data accuracy, system performance, and integrity.



Head of Conservation

Ensures integration of conservation records and workflows.

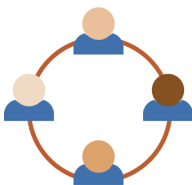


Head Curator

Ensures the CMS supports curatorial work and exhibition planning.

Other Suggested Team Members:

- **Exhibition Manager:** Ensures CMS supports exhibition planning and development.
- **Digital Media Specialist:** Manages digital media integration and online access.
- **Education Manager:** Ensures CMS supports educational programming and public access.
- **Webmaster:** Ensures smooth integration with the museum's website.
- **Marketing Manager:** Ensures CMS supports digital visibility and marketing.
- **Content Specialist:** Manages content accuracy and updates.



TIPS FOR SUCCESS

1. **Diverse Representation:** Include team members from key departments to address all needs.
2. **Clear Roles:** Assign specific responsibilities to streamline the process.
3. **Open Communication:** Maintain regular communication to ensure alignment.

By forming a well-rounded team, you'll increase the chances of selecting a CMS that meets your needs and goals.

Step 2: Appoint a Project Leader and Develop a Plan

After assembling your team, the next critical step is to appoint a CMS project leader. This individual will coordinate the selection process, ensuring the project stays on track and progresses smoothly. A clear, structured plan led by a dedicated project manager will help streamline the process, keep the team focused, and accelerate the path to achieving your goals.

Attributes of a Good Project Leader:



Decision-Making Authority

The leader should have the ability to make key decisions to keep the project moving forward.



Strong Communication Skills

Clear and consistent communication with all team members and stakeholders is essential.



Organizational Skills

Ability to develop and follow structured plans to ensure deadlines and objectives are met.



Problem-Solving Abilities

Must be able to address challenges quickly and efficiently as they arise.



Leadership and Motivation

Capable of inspiring and guiding the team toward shared goals.

A project leader with these attributes will be crucial in navigating the complexities of CMS selection and ensuring successful implementation.

Step 3: Interview Key Stakeholders to Determine Needs

To select a CMS that truly meets your institution's needs, you must first define what those needs are. Every institution's requirements will differ and identifying them will provide a clear foundation for your CMS wish list. The project leader should engage stakeholders with the following key questions:

Examine Existing Processes ▼

Where do you spend the most time in your current collection data workflow?

What challenges or inefficiencies exist in your current processes?

Are there redundant steps that waste time or resources?

What tasks are you unable to complete with your current system?

Determine the Requirements of a New CMS ▼

1. How does your institution's mission align with the potential benefits of a new CMS?
2. What specific problems do you aim to solve with a new system?
3. Will you need public-facing access to your collection through the web?
4. Where do you spend the most time in your current collection data workflow?
5. How important is Digital Asset Management for your collections, and does the new CMS need to support all media formats?
6. What level of IT support will be required for implementation and ongoing maintenance?
7. What is your budget?

Once you've gathered insights from these questions, compile and prioritize the key needs that consistently emerge. This will guide your CMS research and vendor discussions, ensuring you focus on the features most critical to your institution's success.

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Your Requirements Wish List

To better define your CMS needs, consider using a structured worksheet layout. This will help you identify key requirements, relevant users, and specific use cases.

REQUIREMENT	PRIMARY USERS	USE CASES	
Online Access	General public, researchers	Improve access to detailed collection data, support research, and increase institutional visibility.	
Shipping Management	Registrars, exhibition managers	Streamline exhibition and loan workflows, enhance object tracking, and ensure security throughout shipments.	
Location Management	Collections staff, registrars, all internal users	Track objects more effectively within the institution, optimize storage, and improve operational efficiency.	
Digital Asset Management	Archivists, digital media specialists, PR/Marketing, conservators	Centralize media assets, ensure proper usage rights, and maintain control over image and media access.	
Web Sharing/Publishing	Education, web specialists, collections staff, public, researchers	Share collections online seamlessly through an integrated web interface without requiring external databases.	
Hardware Requirements & Upgrades	All users and IT staff	Ensure compatibility with current hardware, support security protocols, and plan for future scalability and upgrades.	

This framework helps ensure that your CMS meets the specific needs of every department while supporting broader institutional goals like efficiency, accessibility, and security.

Step 4: Vendor Research

Choosing the right vendor is crucial to the success of your CMS implementation. A reliable vendor not only provides a CMS that meets your institution's needs but also offers strong customer support and service. Look for a vendor who will act as a partner, willing to listen to and understand your requirements, while helping you through the implementation and beyond.

KEY QUESTIONS TO ASK DURING VENDOR RESEARCH

1. Vendor Experience

- How long has the vendor been in business?
- Are they well-established in the industry?

2. Industry Understanding

- How well do they understand the unique needs of museums and collection management?

3. Relevant Experience

- Does the vendor have experience with institutions of your type and scale, and with similar collections?

4. Client Testimonials

- Who are their clients?
- What feedback do they offer about the system and the vendor's customer support?

5. Support and Service Approach

- What is the vendor's approach to customer service and ongoing support?
- Are they accessible and responsive?

6. System Compatibility

- How well does the CMS integrate with your existing IT infrastructure and workflows?

7. Cost Structure

- What are the implementation costs?
- Are there recurring annual fees, and what do they cover?
- Are there additional costs for support, upgrades, or service packs?

8. Training and Resources

- Check whether the vendor provides adequate training, documentation, and resources for staff to maximize the CMS's potential.

A vendor that offers not only a powerful CMS but also a commitment to understanding and addressing your needs will contribute significantly to the success of your project.

Key Features to Look for in a CMS

When selecting a Collections Management System (CMS), it's essential to choose a solution that can handle a wide range of tasks to ensure efficient and effective collection management. Below are key features that a robust CMS should offer, all of which are available within the TMS Suite.

OPTIMIZED OBJECT AND DATA MANAGEMENT



Compatibility

A reliable CMS should offer easy, browser-based access to your data, ensuring flexibility and convenience for your team. The system should also be compatible with popular database platforms like Microsoft SQL Server for dependable data management.



Standards Compliance

Choose a CMS that aligns with international cataloging standards such as SPECTRUM and CCO. This will ensure consistency and ease in data exchange, essential for institutions adhering to industry best practices.



Data Entry & Exporting

A good CMS will allow you to customize data entry forms to suit your specific needs, as well as provide simple exporting options to Word, Excel, and other formats, improving your workflow efficiency.



Batch Data Import

Look for a CMS that enables quick and accurate batch data imports using formats like Excel or XML. This feature is crucial for saving time when handling large datasets.

EFFICIENT WORKFLOW MANAGEMENT



Exhibition Management

A CMS should allow you to manage every aspect of exhibitions, from multi-venue to touring displays. The system should also integrate with loan and shipping management to streamline exhibition planning and coordination.



Configurability

The best CMS solutions offer high levels of customization. Ensure that the system you choose allows you to personalize data views, workflows, and dashboards, making it easy for your team to access the information they need.



Dynamic Reporting

A good CMS will allow you to customize data entry forms to suit your specific needs, as well as provide simple exporting options to Word, Excel, and other formats, improving your workflow efficiency.



Archival Management

A powerful CMS should provide pre-configured reports, as well as the option to request custom reports, to fit your specific data needs. This helps optimize decision-making and improves staff efficiency.



API Integration

Look for a CMS that provides an API for seamless integration with other systems, ensuring flexibility and enhanced data exchange capabilities across platforms.

POWERFUL SEARCH & ACCESSIBILITY



Quick Searching

The ability to search your collection quickly is essential for staff efficiency. A strong CMS will provide robust search filters and the ability to save search results for future access.



Advanced Search

A CMS should allow for advanced search functionality across large datasets, improving your ability to retrieve specific objects and information with precision.

GLOBAL COLLABORATION AND MULTILINGUAL SUPPORT



Multilingual Functionality

As collections are often shared globally, look for a CMS that supports multiple languages. Full Unicode compliance ensures your CMS can facilitate international collaboration and support diverse communities.



Step 5: Evaluate the Results

While identifying the ideal CMS features is essential, it's equally important to assess the overall value of the system. Evaluating the return on investment (ROI) ensures that the benefits of the CMS outweigh the costs and align with your institution's long-term goals.

Return on Investment (ROI) Analysis

Conducting an ROI analysis will give you a comprehensive view of the project's impact. Begin by identifying all costs associated with the CMS, then assess the corresponding benefits, both tangible and intangible. Below are examples of costs and benefits to consider:

BENEFITS	COSTS
<ul style="list-style-type: none">Improved Operational Efficiency	<ul style="list-style-type: none">Initial Software Purchase
<ul style="list-style-type: none">Consolidated, Up-to-Date Data	<ul style="list-style-type: none">Hardware Requirements
<ul style="list-style-type: none">Better Utilization of Staff Time	<ul style="list-style-type: none">Implementation Fees
<ul style="list-style-type: none">Faster Onboarding	<ul style="list-style-type: none">Data Conversion
<ul style="list-style-type: none">Enhanced Object Preservation and Security	<ul style="list-style-type: none">User Licenses
<ul style="list-style-type: none">Broader Audience Engagement	<ul style="list-style-type: none">Add-ons and Upgrades
<ul style="list-style-type: none">Less Stressful Work Environment	<ul style="list-style-type: none">Ongoing Maintenance
<ul style="list-style-type: none">More Efficient Exhibition Planning	<ul style="list-style-type: none">Training
<ul style="list-style-type: none">Optimized Workflow Processes	<ul style="list-style-type: none">Hosting

Key Considerations:

- Quality Over Price:** While cost is a significant factor, the quality of the CMS and the vendor's support are equally important. A well-supported CMS will ultimately save you time and money through streamlined processes and improved staff efficiency.

Evaluating both the costs and the benefits, including long-term savings in staff time and enhanced workflows, will guide you in selecting a CMS that provides the greatest value to your institution.



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Cost Comparison and Vendor Evaluation

Use the table below to compare the costs and features of different CMS vendors. This will provide a clear overview of how each vendor aligns with your institution's needs and budget.

COST ITEM	GALLERY SYSTEMS	VENDOR 2	VENDOR 3
Assessing Features and Capabilities			
Are Licenses Concurrent?			
Conversion & Data Mapping Services			
Is User Training Included?			
Remote Access/Hosting Available?			
Customer Support Included?			
Digital Asset Management (DAM) Capability			
Integrated DAM System Offered?			
Assessing Fees and Pricing			
Cost Per User License			
Standard Implementation Fee			
Cost for Additional Training			
Hosting Fees			
Annual Maintenance & Support Fees			
Estimated Hardware Upgrade Costs			
IT Requirements			
TOTAL			

Next Steps

1. **Evaluate Costs vs. Benefits:** Consider both the upfront and ongoing costs of each vendor against the benefits they provide. This includes direct costs (licenses, training, hosting) and indirect benefits (improved workflows, better data management).
2. **Request References:** Reach out to each vendor's clients for feedback on their experiences. Assess customer satisfaction with both the system and ongoing support.
3. **Further Engagement:** Arrange additional demonstrations or conversations with your top choices to ensure a deeper understanding of their systems and how they align with your specific needs.
4. **Finalize Decision Criteria:** After evaluating costs, benefits, and feedback, prioritize the vendors who best meet your technical, operational, and budgetary needs.



Making the Right Choice: Partnering for Long-Term Success

Selecting the right CMS is a pivotal decision that will shape your institution's efficiency, growth, and long-term success. A structured approach—defining your needs, engaging key stakeholders, and evaluating vendors—ensures you make an informed choice that aligns with both your immediate goals and future vision.

The ideal CMS goes beyond features; it's about partnering with a vendor who offers strong support, customization, and scalability. TMS Collections, for example, provides a suite of integrated products, including tools to help you manage online collections, conservation documentation, and digital assets, ensuring your system grows with you. With the right system, your institution will streamline workflows, enhance collection management, and elevate the overall experience for staff and visitors.

Ready to find the best solution for your institution? Contact one of our Account Managers today to see how the TMS Suite can be tailored to your needs.

CONTACT US