ART ADVISORY 101 - MODULE 4 SOFTWARE PURCHASE CHECKLIST

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Before a collector buys a collection management software package, it's important to figure out their requirements so that you can recommend the best system for their needs. Below are some questions to ask to get the conversation started. See whether the system can accommodate your client's requirements and bring the list to your meeting with the software company.

COLLECTION DETAILS

- How many pieces are there in your client's collection and is it homogenous or are there many different media, styles and artists (eclectic)?
- How active is your client (i.e. how often do they buy, sell or loan artworks)? Is the collection static or are there many changes that need to be recorded on a daily or weekly basis?
- What is the key information about the collection that your client needs to record? Artist's Name? Title? Location? Appraisal or Insurance Value?
- What reports does the collector want to be generated by the system: Insurance Reports by Artist Name? Inventory Lists per House? Yearly Appraisal Reports?

DATA MANAGEMENT

- Who will maintain the data (i.e. you, full-time registrar, part-time staff)? If nobody will maintain the data, the system will lose its value quickly.
- Is the collection management system you want to buy suitable for your hardware (i.e. Windows or Mac)?
- Is the system's security sufficient, particularly if in the cloud?
- How do you transfer legacy data (i.e. existing database) into the new system? This is particularly important for large collections so make sure a transfer can be done before buying the system.
- How large are the files that the system supports (i.e. high res images)? Can scanned documents be added to each art record in the system?
- Can the software system be customized, or is what you see what you get? I.e. customized reporting, additional data fields, etc.

- How does the software company charge and do you get regular software updates?
- How complex is the collection management system that you're looking at? Too complex may be overkill and time-consuming, too basic may mean that not all required details get recorded. This also depends on who will maintain the database.