Club software move planner

A blank plan, a worked example and a launch checklist.

Free template from SportsHQ (www.sportshq.app). Adapt freely; check your own constitution and governing body rules where flagged.

This is a manual planning file, not an app import template. It does not clean, import or sync data. Keep personal details, passwords and card data out of this planner.

1. Agree the move

Club / plan date: ____

Move owner / second checker: ____

First club job to move: ____

New system / supplier contact: ____

What must work before launch: ____

Source file / owner	Move or keep / reason
________________	________________
________________	________________
________________	________________

Before sharing real records

- [ ] Original files kept unchanged in a private place.
- [ ] Dated working copy named and its owner agreed.
- [ ] Secure transfer and access agreed with the supplier.
- [ ] Import fields, support and cost confirmed in writing.
- [ ] Private archive and spare-copy review agreed.

2. Map the columns

Ask for the current app import template. Record where each field goes. Keep the full source workbook as well as any CSV exports. Check dates, blank values and IDs such as 0017.

Source column	New field / agreed rule	Checked by
________________	________________	________
________________	________________	________
________________	________________	________
________________	________________	________

Worked example: six rows, five people

Fictional records only. The owner has confirmed Sam's duplicate. Jo and Lee are different people who share a contact email.

Row / member	Decision
1 / M01 Alex	Ready.
2 / M02 Sam	Ready.
3 / M02 Sam again	Confirmed duplicate of row 2. Leave out of the test file.
4 / M03 Jo	Hold. Shared contact email with Lee.
5 / M04 Lee	Hold. A separate person. Do not merge with Jo.
6 / M05 Pat	Ready.

6 source rows = 3 ready + 2 held for review + 1 confirmed duplicate. Keep the original unchanged. Expect 3 new records only if all 3 ready rows pass the test.

3. Test and explain the result

Start with fictional records in an agreed test space. Real members must not be contacted or charged. For the final move, check the agreed real source copy too.

Test file / version: ____

Test space / supplier approval: ____

Source rows / ready / held / confirmed duplicates:
____

Expected new / updated / skipped rows: ____

Actual new / updated / skipped / failed rows: ____

Explain every difference. Updates do not add a person. Do not assume a success message means all rows moved. Agree a safe fix before repeating an import.

Row or issue reference	Next action / owner	Checked result
________________	________________	________________
________________	________________	________________
________________	________________	________________

Test checks

- [ ] Member details and IDs match the source.
- [ ] Shared emails keep separate people separate.
- [ ] Dates, member types and balances are correct.
- [ ] Private fields are visible only to the right roles.
- [ ] Recorded choices about messages are kept.
- [ ] Another volunteer can complete the chosen job.
- [ ] An export opens and contains the expected records.

4. Approve launch or pause

Switch point / who approves it: ____

Where changes are logged during the final move:

____

Who enters and checks those changes: ____

Held records / owner / how members will still be helped:

____

Reasons to stop / person who can stop the move:

____

Supplier-agreed fallback / where newer changes are kept:

____

Before members use the new system

- [ ] Final record checks passed and differences explained.
- [ ] Separate payment setup checked by the treasurer.
- [ ] Invites and payment actions approved before they run.
- [ ] Volunteers know their tasks and the help contact.
- [ ] First live task has a named checker.
- [ ] Old list becomes read-only after approval.
- [ ] Private archive, access and review date agreed.

If checks fail, pause and contact the supplier. Keep newer changes. Do not replace them with an old file. Do not delete old records just because the import has finished.

Decision: approve or pause / reason: ____

Approver / checker / date: ____