Case Management System Checklist

Use this checklist to assess whether your current case management system is keeping pace with your mission and frontline needs.

Category	Key Question	When to Rethink
Program Alignment	Does your system reflect how your programs actually operate today?	Inability to support unique workflows, evolving service models, or coordination across programs
User Experience	Is the system intuitive and easy for staff to use consistently?	Low frontline adoption, clunky workflows, lack of mobile access
Reporting & Insight	Can you generate the reports funders, partners, and leadership need—quickly?	No custom dashboards, delays in generating insights, or manual reporting processes
Data Integration	Does your system connect with other core tools (referral, intake, finance)?	Manual data entry, disconnected systems, or duplicate records
Equity & Accessibility	Is your system designed to support inclusive, client-centered services?	Limited language options, rigid design, or failure to support trauma-informed or culturally responsive practices
Scalability & Support	Will the system grow with your organization's needs over time?	Outdated architecture, reliance on vendor customization, or lack of flexibility for future needs

If you answered "no" to more than two questions above, it may be time to reconsider your case management system.

[Talk to a Strategic Advisor]

Since 2005, **Exponent Partners** has been a trusted ally to Human Services nonprofits and Foundations, working together to deliver greater impact through mission-aligned information systems.