



AUTOMATE MINISTRY PROCESSES

HOW TECHNOLOGY CAN
GUIDE YOUR CHURCH TO
GREATER ENGAGEMENT



TouchPoint

See disciples. Not data.



Ministry is hard, often messy work. And as ministries expand and become more complex, it comes with more staff and lay leaders to manage, more congregants to disciple, and a higher likelihood that people will slip through the back door of the church unnoticed.

Recent studies suggest that about 80% of churches are either plateaued or declining, roughly 38% of congregants struggle to live their faith outside of the church, and, at most churches, 80% of tithes and offerings are being given by 20% of the attendees.¹

That's the bad news.

The good news is that churches can leverage technology (while never forgetting the Holy Spirit) to enhance human-driven ministry. Hundreds of software tools exist to assist churches in expanding God's kingdom, including advanced church databases that can be programmed to create accountability systems that ensure no one gets missed.

When lost people come to church, they desire to be known. This can be a tall order for pastors shepherding a flock of hundreds, or even thousands.

To address this, the modern church almost universally, and wisely, has a line item in the budget for a Church Management Software (ChMS). An advanced ChMS allows you to know your members deeper than ever by having a wealth of information stored in their contact record.

Technology can use this information to automate communications and alert staff and lay leaders when someone is in need of care, encouragement, or inspiration to take their involvement with your church to a deeper level.

What should a modern ChMS be able to store?

¹ <https://malphursgroup.com/state-of-the-american-church-plateaued-declining/>



PEOPLE INFORMATION

This is typically simple demographic information. On a person's record we should be able to get answers to common questions like: Who is this person? What is their name? Who are they related to? Where do they live?

Beyond the personal information, we should also be able to see what activities, classes, and events the person is involved in, what they like to do, preferences, personality traits, spiritual gifts, and registration information.

A modern ChMS should also allow the church to create custom fields that are fully integrated into the system's reporting structure. This gives the church more flexibility in understanding their congregation and the things they care about.

ATTENDANCE HISTORY

A modern ChMS should have multiple avenues for taking attendance, including: volunteers taking attendance with a mobile device; check-in for children, adults, and volunteers; roll sheet attendance; and some form of mobile self check-in.

Attendance history should be quickly accessible for any staff member on an individual's record as well as easy to find and read reports.

The system should also provide an avenue for understanding what type of attendance this was. Was this person attending a Bible fellowship class or a volunteer opportunity? Were they attending a class as a member or an outreach leader?

The different attendance types should be easily defined, found, and included in reports.

GIVING HISTORY

Givers should be able to give to the church directly from the ChMS or an integrated third-party product. This giving information should then be stored on the record and easily accessible by the giver and qualified personnel on church staff.

Most givers prefer to give to multiple funds on a single check or transaction, so it's important that a ChMS can accommodate multiple funds and transaction types.

It's becoming increasingly common for givers to give beyond the bank account. I've worked with churches in the past that have received everything from trucks to stock to palm trees as donations. A ChMS must have a method for accounting for this to ensure good record keeping.

THE FIRST RULE OF AUTOMATION: DEFINE YOUR TERMS

When it comes to thinking through automation processes, you and your team should have one clear goal in mind: be specific.

Many churches have gotten into a bad habit of defining important characteristics too loosely. For example, it's common for a church to have a category of attenders they call *active attender* or a type of giver they call *inactive giver*.

What do these terms mean? How does one become an active attendee? How many days, weeks, or months of non-gifts before I suddenly become an inactive giver?

Be specific. As a ministry team, determine what your different statuses or substatures mean. For one church, an active member may be someone who has attended three times in the last four months, they've given twice in the last 30 days, and they've completed an introductory class.

For another church, an active member may be someone who is a member of a small group, has given more than \$500 in the last 365 days, and has attended anything in the last three years.

Both of these examples are correct, because both examples are specific. They have guidelines and boundaries and put your team on the same page.

Once our terms are defined, they can be encoded into a modern ChMS.

Three Ministry Processes That Can Be Automated Using Your Church Management System



#1 ASSIMILATION AND ONBOARDING PROCESSES OF VISITORS & NEW MEMBERS

The first time a new guest arrives on your campus is a crucial moment for any prospective member of your church. Churches across the country recognize this and, rightfully, have taken the steps to create exquisite first impressions. The coffee's warm and the greeters' smiles are warmer. From the moment they walk in the door, guests feel welcome and at home.

But their experience doesn't end after the service is over. In fact, the follow up that happens after a guest's first visit may be the determining factor in whether the person ever comes back to your church, so a process must be in place.

This is where automation can help. With so many new records added to the database every Sunday, it's easy for one person to get lost in the shuffle.

The best onboarding practices guide new guests to become active attenders, then members, and eventually leaders.

An example of a good automated process would be one that alerts staff and requires that an action, such as a visit or phone call, be taken within the first five days of the first time someone attends. Once action is taken, the system can then alert staff to follow up after two months. If someone hasn't joined a class after attending twice, another alert is sent to staff to encourage the individual to get more involved and deepen their walk with Christ.

The process can continue like this. Again, be specific. Define your terms clearly and a good ChMS can help you put those into action.



#2 ALERTING YOU WHEN PEOPLE HAVE STOPPED ATTENDING

Perhaps more important than automation for those who have *started* attending is being alerted to those who have *stopped* attending. It's also important to note that automated rules don't only have to apply to staff. Lay leaders should also be expected to participate in ministry outside of Sunday morning.

At one church, Luke and Blakely attended their Young Marrieds class on a regular basis, rarely missing a week. On a Monday, the newlywed leader, Daniel, received the weekly automated email that clearly listed his new guests and those who had been absent more than three consecutive weeks.

Daniel was surprised to find Luke and Blakely's name listed with the other lapsed attenders. He took action and texted Luke to let him know he'd been missed. Daniel asked about work and made polite small talk. He then asked Luke to meet him for coffee to catch up.

When they met, Daniel was able to move beyond small talk and ask Luke about life and marriage. As it turned out, all was not well. A series of broken home appliances and a broken down car had made money tight and led to frustration between the young couple. The frustrations between them became so great that they lost the desire to attend church for fear of appearing "fake."

Daniel was able to pray with Luke and encouraged him to come back to class, broken pieces and all. He rallied the leadership team to provide a full week of meals for Luke and Blakely so they could save money to pay down debt.

In this case, an automated email and a diligent class teacher may have saved a marriage. If we are more aware of what is happening within our church, how much more can the Holy Spirit prompt us to care for our members?



#3 ALERTING YOU WHEN PEOPLE HAVE STOPPED GIVING

Dramatic decreases in individual gifts can point to financial trouble at home or, in some cases, troubled marriages.

The parable of the Widow's Offering in Mark 12:41–44 teaches us that God is less concerned with how much we give than He is with the spirit in which we give.

When it comes to those who give, we should adopt Jesus' perspective. Upon seeing rich men flaunt their wealth and give much, Jesus observed, "This poor widow has put more into the treasury than all the others" (Mark 12:44).

It's important that churches track the gifts they receive. Not to "keep score" of the highest givers and give them preferential treatment, but as a means of good record keeping and barometer of an individual's well being.

Drastic shifts in an individual's giving is often a sign of personal struggle. When money is tight or someone has decided to leave their church, they will always do what is noticed least. According to some church leaders, a staff can predict that a member will leave their church within three months after their giving has stopped.

Going one step further, we can combine changes in attendance with changes in giving behavior for deeper insight into who is coming to church and what is happening in their lives. These changes can then trigger alerts to the appropriate staff member or lay leader so that follow up can occur.

Automation within the ChMS makes each of these easier. Rather than running manual reports, the reports can be emailed to each team member automatically. In some cases, software can even create a system task that tracks the follow-up and results of ministry calls and visits.

But while automation can make our ministries more efficient and effective, where does automation end and ministry begin?



What Needs to Be Human?

When it comes to technology in our ministry, we need to ask ourselves: *What **can** software do for our ministry, and what **should** software do for our ministry?*

Can a ChMS send an automated email to a new guest? Yes. This is a fairly simple routine that many systems can perform.

But *should* it?



#1 PERSONAL CALLS, VISITS, AND SO ON

There will never be a substitute for a personal visit or phone call to a new guest. Emails were once cutting edge and are now, to many, tedious white noise. So it's no wonder that automated “

thank you for coming” emails are usually met with apathy or even annoyance.

Churches are shifting and focusing more on attracting Millennials. As we do this, keep in mind that if there's one thing the younger generation can spot, it's authenticity. An automated “so glad you came” auto-email from a church will be met with boredom at best and anger at worst. New guests want to be known, understood, and seen.

Ministry—real ministry—does not happen in the ones and zeros of automated computer programming. Ministry is face-to-face when possible or, at the very least, a friendly personal phone call.

Paul, like so many other heroes of the Bible, was hands on in his ministry. When he wasn't able to be physically present with a church (as he was often imprisoned, shipwrecked, etc.), he wrote a letter. His letters to the Galatians, Ephesians, Philippians, Colossians, and Thessalonians were specific to the audience. If copy and paste existed in 50 AD, we can be sure Paul would not have used it.

So what does this look like in today's church? Don't take shortcuts in your communication to new guests, visitors, homebound, or hospital visitations. Like Paul, contacts should be personal and specific to the person you're reaching. Unlike Paul, you could use a text message rather than an epistle. Not all communication needs to come from the staff. Delegate responsibilities to your lay leaders so they can be edified and grow in their own ministries.

Most important, the person being contacted should feel known and understood. With personal contact, they will see that time and care was taken, and they will feel loved. That is something that an automated email will never be able to accomplish.

#2 SCREENING VOLUNTEERS

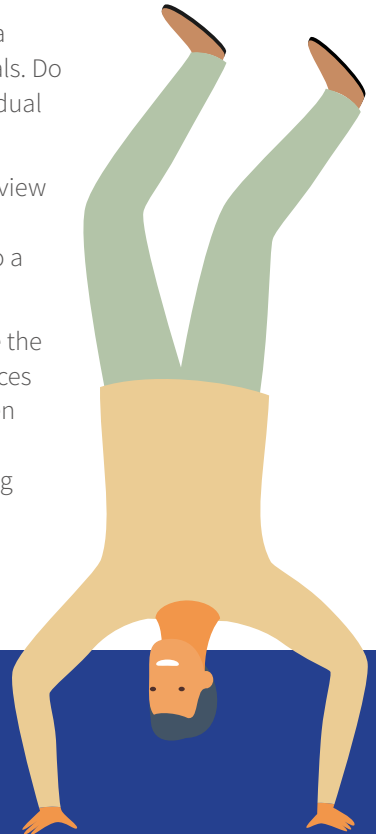
In a fallen world, we understand that safety and security in our churches is more important than ever. Recent events have shown us that some church's volunteer vetting policies have been too lax and innocent people, sometimes children, have been hurt.

At one time, churches using background check services to vet and clear their volunteers were cutting edge. This isn't the case anymore. Background checks are now bare minimum in the process of approving a new volunteer for duty.

First, background checks should be read thoroughly by a qualified member of your staff. The contents of a background check can vary wildly between individuals. Do not allow an automated system to approve an individual without the added discernment of a human being.

Second, add more layers into the vetting process. Review records and involvement history. Check to see if the individual is a committed giver to the church. It's also a good idea to check social media accounts.

Finally, introduce more of a human element. Require the prospective volunteer to produce one or two references from ministry leaders from the ministries they've been involved in. Conduct interviews and involve other staff members in the decision before finally approving volunteers.



#3 DISCIPLESHIP

No ChMS can create a culture of warmth, authenticity, and humility that thriving churches have in common. The pastors and ministers set the tone from the pulpit which trickles down through the staff to each and every volunteer, lay leader, and congregant.

One of the best and most encouraging trends in churches today are the healthy discipleship models leaders are rolling out to their congregation.

Discipleship, by its very nature, is personal and unique every time it takes place. Most churches provide structure and milestones for their discipleship leaders and the disciplined to hit. This is where technology can have a profound influence on the discipleship process.

Technology can assist in pushing curriculum and next steps from leaders to those being disciplined. These tools can organize the process and help provide clarity. They map out the process so everyone involved understands where they've been and where they're going. These tools should be available to lay-leaders, with appropriate access granted, which effectively extends the reach of your staff.

The technology is the tool, but the success of discipleship will always be found in three things:

A successful discipleship group requires a diligent leader. No technology or automation can replace a leader that is committed to God's Word and consistent in his or her approach. This sort of leader learns the material provided and models it in his or her actions.

A commitment from the one being disciplined. As a church, we can invest all of the money in the world into innovative technology that pushes curriculum and resources to those in our discipleship groups. But without a commitment and buy-in from the people being disciplined, the curriculum will be left unread and unheeded.

The provision of the Holy Spirit. Ultimately our trust is in Christ, not technology. We must allow the Holy Spirit to move and work in each of our lives and not circumvent His work through reliance on automation.

CONCLUSION

In a large church in Memphis, a sign hangs above the desk of the database manager responsible for maintaining data. It reads: “Each number is a person for whom Christ died.” This sign serves as a reminder to look beyond the numbers we see on the screen and into the heart of the people those numbers represent.

As our churches grow, our technology must grow with it. Automation within our church database can help us expand God’s kingdom. Automated processes make us more efficient in our assimilation processes and can help us identify those that are slipping through the cracks and might have been missed.

However, we can’t forget to include the human element. No automation can replace the personal touch of a well-timed, encouraging text message or a smiling face during a hospital visit. Technology can help your staff and lay leaders make sure these personal touches are timed appropriately and not overlooked.

So let’s remember how Jesus treated the woman in Luke 8. While Jesus was being crowded and touched by a throng of onlookers, He was aware of the desperate, unique touch of one woman longing for His healing grace.

Jesus knows each of us individually and meets us personally. Let’s follow His example.

NEXT STEPS

- **Map out your current ministry processes, and identify where software could bridge some gaps.**
- **Figure out if your current ChMS is being properly leveraged to cover these blind spots or if it is incapable of doing so,**
- **If your system is lacking, it may be time to start shopping for a new ChMS. If that’s you, we created an excellent guide that helps church leaders know what questions to ask when searching for the right software for their church.**





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