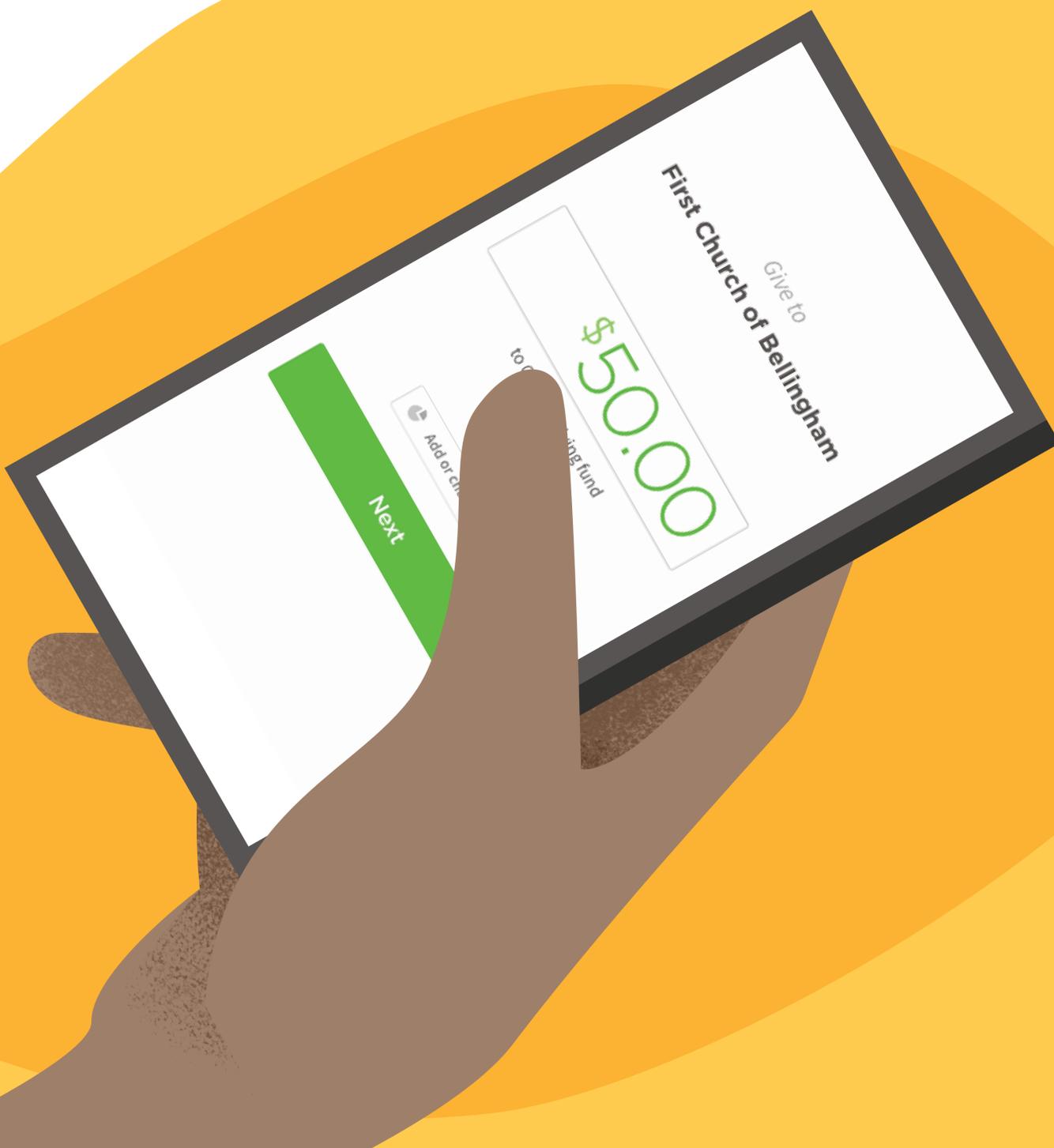

How to Roll out Mobile Giving to Your Church





Since 1992, Faithlife Corporation (formerly Logos Bible Software) has grown from a couple of programmers in a basement into the largest developer of Bible study software and a worldwide leader in multilingual electronic publishing. We partner with more than 500 publishers to make more than 120,000 Bible study resources available to customers around the world.

Innovation is key to Faithlife's growth. In the last few years, we've expanded from our flagship software product, Logos Bible Software, to a variety of tools to complement your faith and Bible study experience. In June of 2011, we launched Faithlife Ebooks, a Christian ebook store and ereader app. In 2012, we released Faithlife Proclaim Church Presentation Software along with the Faithlife Study Bible and faithlife.com, a social network that allows Christians from all over the world to connect and share ideas online.

Most recently, we've launched an entire suite of church administrative tools including Faithlife Sites, Faithlife Sermons, Faithlife TV, Faithlife Giving, and more! And we're still just getting started.



How to Roll out Mobile Giving to Your Church

Choose your adventure

Congratulations! If you're reading this, it's likely because you've decided to transition to Faithlife Giving. By following the step-by-step process in this guide, you can make this a simple and seamless process for both church staff and givers.

Before we can get started, we need to know what kind of transition you'll be making:

I'm setting up mobile giving for the first time.

Simply navigate down to "Option one" right below.

I'm moving from a giving platform that doesn't allow me to migrate my data.

Please scroll down to "Option two" below or [click here](#).

I'm migrating from another giving platform.

Please scroll down to "Option three" below or [click here](#).

Option one: Setting up giving for the first time

Setting up giving for the first time is simple. Just follow these four simple steps:

- 1. Build your 90-day communications plan.**
- 2. Align your team (days 1-30).**
- 3. Launch to the congregation (days 31-60).**
- 4. Drive full adoption (days 61-90).**

Build and execute your 90-day communications plan

Every church's 90-day plan will be a little bit different. That said, there are some key elements that should be in all of them. We'll highlight those below, but you'll need to build in any supplemental requirements that are specific to your church. At a high level, you'll have three stages/goals: internal alignment, congregational alignment, and congregational adoption.

Days 1-30: Internal Alignment

During this time, you should focus on aligning your staff and volunteers (including your elders, board members, finance and comms team members, and any Faithlife Giving champions) and ensuring there's complete buy-in or verbal agreement to support this strategic shift for your church. Your staff and volunteers should have set up their Faithlife account and created their first sample gift, so they know how to walk someone else through the process of giving for the first time. Get your non-digital givers involved, too, by recording your cash and check gifts in Faithlife Giving.

If you skip this step and/or fail to build internal alignment, you may not be able to achieve full adoption of the platform.

Having all of your leaders on the same page and repeating the same messaging can often be the difference between a successful and unsuccessful rollout. Even one powerful naysayer can do quite a bit of damage.

Here are a few things you should do as a team:

- **Ensure your entire staff and volunteer team has set up their Faithlife accounts and has given a gift to the church through the platform so they can show others how to give as well.**
- **Agree on talking points about why you are adopting a new giving platform. Do not leave room here for exceptions. Remember: the end goal is to get everyone using one platform.**
- **Decide on how you want to tell the congregation about this important transition.**
 - Do you want to announce it first in church?
 - Do you want to use slides?
 - Do you want to take 10 minutes in the announcements time to walk everyone through setup, phones in hand?
 - Do you want to send it out via email?
 - What about social media posts?

- Are you going to need flyers or bulletin inserts?
 - Do you want to have the youth group wear lanyards and stand in the back to help assist the tech-adverse after the service is over?
 - Do you want to do some strategic combination of these?
- Determine when you'll add the new language and buttons to your website, app, and any other places where you mention giving opportunities (such as bulletins and envelopes).

Days 31–60: Congregational Rollout

Now that you and your team are aligned on what you're presenting and when ([here's a great communications template you can use](#)), the congregational rollout should be pretty easy. It's just about execution, really. Choose the date you want to officially launch, and have at it!

This is what you planned for.

Remember, on average, people have to hear a message 7–8 times before they are likely to take action. Don't be afraid to repeat yourself a few times.

Make sure to do the following:

- Make weekly announcements about the new giving platform until 100% of your church is set up and onboarded.
- Be clear, concise, and emphatic in your language both on the stage and through email.
- If you are sending out email reminders each week, make sure to exclude those who have already set up their giving accounts.

Days 61–90: Congregational Adoption

Whew! By now, you should only have a few stragglers who haven't yet set up giving. It's time to up your game to drive as much adoption as possible during these last 30 days.

Make a list of everyone who hasn't set up their account yet. If it's only a handful of people, give them a personal phone call. If it's a larger list, start with a more emphatic ask both during announcements and via personalized emails. Make a team of people available to help with the setup if any aren't tech savvy.

Your goal in these last 30 days is to onboard 100% of your church and to have everyone give their first gift or set up a recurring gift.

You get the idea: everyone needs to be onboarded. Generally, 60% is a target. Results may vary. Rolling out digital giving for the first time can take time for churches to fully adopt, but you want to do everything you can to encourage early setup and giving.

Make sure to do the following:

- **Be clear, concise, and emphatic in your language both on the stage and through email.**
- **Get on the phone, if you need to.**
- **Have a team of volunteers ready to help after services. Email and print easy-to-follow directions about how to set up new online gifts.**
- **Ensure your website has very clear calls-to-action and navigation telling people how they can give.**

High five! You made it!

Congrats on a job well done. If you have any further questions or need help with anything else, please visit our [support center](#). We're always happy to help.

Option two: Moving from a giving platform that doesn't allow us to migrate our data

Setting up giving for the first time is simple. Just follow these five steps:

1. Choose an end date.
2. Build your 90-day communications plan.
3. Align your team (days 1–30).
4. Launch to the congregation (days 31–60).
5. Drive full adoption (days 61–90).

Choose an end date

One of the simplest but important first steps is to choose the end date for your current platform (if you have one). This step is important because it will help shape your mental timeline and the communication plan you'll be building in step two.

Build and execute your 90-day communications plan

Every church's 90-day plan will be a little bit different. That said, there are some key elements that should be in all of them. We'll highlight those below, but you'll need to build in any supplemental requirements that are specific to your church. At a high level, you'll have three stages/goals: internal alignment, congregational alignment, and congregational adoption.

Days 1–30: Internal Alignment

During this time, you should focus on aligning your staff and volunteers (including your elders, board members, finance and communications team members, and any Faithlife Giving champions) and ensuring there's complete buy-in or verbal agreement to support this strategic shift for your church. Your staff and volunteers should have set up their Faithlife account and created their first sample gift, so they know how to walk someone else through the process of giving for the first time.

If you skip this step and/or fail to build internal alignment, you may not be able to achieve full adoption of the platform.

Having all of your leaders on the same page and repeating the same messaging can often be the difference between a successful and unsuccessful rollout. Even one powerful naysayer can do quite a bit of damage.

Here are a few things you should do as a team:

- **Ensure your entire staff and volunteer team has set up their Faithlife accounts and has given a gift to the church through the platform.**
- **Agree on talking points about why you are adopting a new giving platform. Do not leave room here for exceptions. Remember: the end goal is to get everyone using one platform and to turn any older platforms off.**
- **Decide on how you want to tell the congregation about this important switch.**
 - Do you want to announce it first in church?
 - Do you want slides?
 - Do you want to take 10 minutes in the announcements time to walk everyone through the change, phones in hand?
 - Do you want to send it out via email? What about social media posts?
 - Are you going to need flyers or bulletin inserts?
 - Do you want to have the youth group wear lanyards and stand in the back to help assist the tech-averse after the service is over?
 - Do you want to do some strategic combination of these?
- **Determine when you'll swap out the language on your website, app, and any other places where you mention giving opportunities (such as bulletins and envelopes). Do you want**

to have a transition period where the old platform and new are both listed or make the switch cold turkey? Detail this, along with deadlines in your plan.

- **If you have a giving platform you'll be switching from, make sure your entire team is prepared to answer questions about how to cancel gifts in the existing platform, how to download any reports they might need from the current platform, and how to access their giving history. You'll probably want to email this information to everyone as well or provide it in the weekly bulletin for a few months.**

Days 31–60: Congregational Rollout

Now that you and your team are aligned on what you're presenting and when ([here's a great communications template you can use](#)), the congregational rollout should be pretty easy. It's just about execution, really. Choose the date you want to officially launch, and have at it! Remember, on average, people have to hear a message 7–8 times before they are likely to take action. Don't be afraid to repeat yourself a few times.

This is what you planned for.

Remember, on average, people have to hear a message 7–8 times before they are likely to take action. Don't be afraid to repeat yourself a few times.

Make sure to do the following:

- **Every time you make an announcement about the new giving platform (and you should be making these weekly until you only have a few people left to move), make sure to include the end date of any old platforms, so your church clearly understands how long they have to move to the new platform before the old one goes away. Pro tip: Publicize the end date as a week or two before you actually have to shut off the old platform to allow plenty of wiggle room, if needed. Be clear, concise, and emphatic in your language both on the stage and through email.**
- **If you are sending out email reminders each week, make sure to exclude those who have already made the switch to the new platform and successfully offboarded from the old platform (if you have one).**

- **If you have a link to your previous giving provider still on your giving page of your website, consider making it much smaller and increasing any notices needed about it going away soon. You might also want to include instructions on how to transition away from the old platform to the new so nobody is confused. Please note: we recommend removing your old platform as an option on your website as soon as possible. Leaving it up longer than needed tends to stretch out the transition timing longer than ideal, and you definitely do not want any new gifts or recurring gifts to be set up in the old platform while you're working on moving to a new one!**

Days 61–90: Congregational Adoption

Whew! By now, you should only have a few stragglers who haven't transitioned to the new platform. It's time to up your game to drive as much adoption as possible during these last 30 days.

Make a list of everyone who hasn't yet made the switch yet. If it's only a handful of people, give them a personal phone call. If it's a larger list, start with a more emphatic ask both during announcements and via personalized emails. Make a team of people available to help with the setup/transition if any aren't tech savvy.

Your goal in these last 30 days should be to leave no survivors (on your old platform).

That sounds drastic, but you get the idea: everyone needs to be onboarded to the new system so you can turn the old one off!

Make sure to do the following:

- **Be clear, concise, and emphatic in your language both on the stage and through email. Get on the phone, if you need to.**
- **Make sure everyone remaining understands they only have 30 days left to switch.**
- **Get on the phones if you need to**
- **Have a team of volunteers ready to help after services. Email and print easy-to-follow directions about how to set up new online gifts.**

- **Update your website to only allow giving through the new platform. Include clear instructions about how to completely move from the old platform to the new one.**

High five! You made it!

Congrats on a job well done. If you have any further questions or need help with anything else, please visit our [support center](#). We're always happy to help.

Option three: I'm migrating from another platform

Migrating to Faithlife Giving from most other platforms is a piece of cake. You can migrate your givers over in three simple phases:

- 1. Move new gifts (immediately)**
- 2. Transfer recurring gifts (within 30 days)**
- 3. Import giving history (within 90 days)**

Let's dig into each of these and unpack what's involved at each stage.

Move new gifts

The first step in migrating platforms is to swap out the links where people can go to set up new gifts. So that means updating your website, church app, and anywhere else your giving link might live.

Note: If you already have a healthy percent of your church giving digitally, you can simply announce the transition, but if you didn't launch your previous giving platform well or if you would like to see more of your church giving digitally, consider reading the options above for more ideas about how to set up a new giving platform and truly drive adoption in your church.

Make sure to do the following:

- **Replace your old giving link with your new one on your website, app, and anywhere else you regularly link to your giving platform.**

- **Announce from the stage, via email, bulletin insert, slide, social, and app (if you have one) that you're in the process of migrating to Faithlife Giving. Ensure you are able to clearly explain why your church is making this switch and briefly explain the migration will be happening over the next 90 days.**
- **Consider doing a “relaunch” of digital giving at your church if you never onboarded your previous platform well. See launch ideas in section one above.**

Transfer recurring gifts

Within 30 days, you'll want to transfer your recurring gifts from your old platform to Faithlife Giving. To do this, you'll need an export from your previous provider, and you'll need to book a call with Faithlife to start the import process. Faithlife will then let you know when you can expect to see that import completed.

Make sure to do the following:

- **Communicate to your existing recurring givers that their recurring gifts are being moved to a new platform. Give them a rough estimate of what they can expect to happen and when they should be fully transitioned to Faithlife Giving.**
- **Determine the date you'll shut down your previous giving platform and make a note of your cancel date.**
- **Sit back and twiddle your thumbs because this is easy.**

Import giving history

Finally, you'll need to import that giving history for your givers. Again, once you have the export of that historical data, just book some time with Faithlife to get this process started.

Make sure to do the following:

- **Clearly communicate to all givers that their gift schedules and giving history is being moved to a new platform and they can access and manage their recurring gift in their individual Giver Portal on faithlife.com/giving. A Faithlife account is required to access this.**

- **Ensure all givers have been invited to your Faithlife church group.**
- **Once the import is done, have your givers log in to the new system and ensure their giving history looks correct.**

High five! You made it!

Congrats on a job well done. If you have any further questions or need help with anything else, please visit our [support center](#). We're always happy to help.

Communications Template

Note: This is an example of a communication timeline used by a church announcing a move to a new giving platform. Feel free to adapt the timeline to fit your church.

Make	Targeted Audience	Channel	Message
Thursday, February 25	Ministry leaders and key volunteers	Personal email from church admin	We're moving to Faithlife Giving! Here's how it will help our church.
Tuesday, March 1	Current online givers	Email from the church	Announce Faithlife Giving and how givers can create an account and move their online giving (email 1 of 4)
Tuesday, March 1	All	Church website	Overall info about Faithlife Giving: what it is, how it will help the church, and how people can start using it
Thursday, March 3	Entire email list	Church-wide email	Mention Faithlife Giving in the church's weekly email with a brief explanation of how to create your Faithlife account and move your online giving (week 1 of 6)
Sunday, March 6	Members and guests	Bulletin insert	What Faithlife Giving is and how the church will use Faithlife to stay in touch all week (week 1 of 4)
Sunday, March 6	Members and guests	Stage announcement	Announce Faithlife Giving in the service, and show THIS CLIP (week 1 of 4)
Thursday, March 10	All	Church-wide newsletter	Reiterate in the weekly email (week 2 of 4)
Thursday, March 10	All	Social media	A few details about Faithlife Giving with a link to the website for more info (post 1 of 2)
Sunday, March 13	Members and guests	Stage announcement	Announce during the service, and use the bulletin insert (week 2 of 4)

Make	Targeted Audience	Channel	Message
Monday, March 14	All	Church-wide email from pastor	Vision casting for how Faithlife Giving will bring generosity and community together
Tuesday, March 15	Online donors	Personal email from church admin	Email from church admin reminding people with recurring gifts to move their donations to Faithlife Giving (2 of 3)
Thursday, March 17	Members	Mailed postcard	Send a postcard to members with an introductory sentence and a reminder to set up their profile
Thursday, March 17	All	Church-wide newsletter	Reiterate in weekly email (week 3 of 4)
Sunday, March 20	Members and guests	Stage announcement	Announce during the service, and use the bulletin insert (week 3 of 4)
Thursday, March 24	All	Church-wide newsletter	Reiterate in weekly email (week 4 of 4)
Thursday, March 24	All	Social media	Reiteration on social media (post 2 of 2)
Sunday, March 27	Members and guests	Stage announcement	Announce during the service, and use the bulletin insert (week 4 of 4)
Monday, March 28	Stragglers—people with recurring gifts who haven't moved their giving to Faithlife	Personal email from church admin	Remind people to move their regular giving, offer to help, and tell them when their giving on the old platform stops running

If you use this timeline for your church's transition to Faithlife Giving, plan to continue talking about online giving in your weekly announcements for at least once a month. Remember: when you get tired of hearing a message, your congregation is probably just starting to remember it.