

Streamlined Scheduled Giving Migration

Minimizing disruption to recurring giving (and givers) is crucial. That's why Vision2 offers an automated approach to scheduled giving migration that is:

Easier

Our intelligent, automated personalized email campaign process is easier for givers

Safe

Delivers secure full data migration (as available from other giving solution)

Proven

Achieves substantially higher success rates of complete schedule migration



Intelligent and Safe Migration of Recurring Gifts

The Vision2 Approach vs. Other Giving Solutions

Change is challenging. That is why we are committed to achieving 100% satisfaction on each phase of implementation, especially with recurring gift migration.

We believe the involvement of your givers should be minimal and 100% personalized. Our intelligent and personalized process takes the burden off of you and your givers, which points to the difference that our dedication makes.

Vision2 Takes the Burden Off of You and Your Givers

Other Giving Solutions

- 3-5 generic migration emails sent to givers
- Givers must close out their old gifts
- Gifts manually recreated by givers across multiple screens

The Vision2 Approach

Prior giving solution shares all data*

- All schedules and payment methods are imported and reconnected
- Unsuccessful schedules are addressed for complete migration
- **Minimal giver involvement required**

The Vision2 Approach

Prior giving solution does not share payment method data

- Intelligent, personalized email campaign employed
- Recurring gifts are connected to existing profiles
- **Minimal giver involvement required**



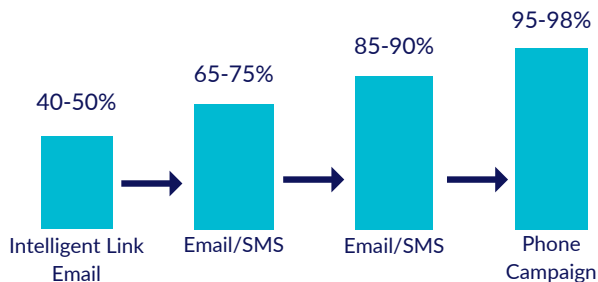
Campaign Process Stages

It's as Simple as 1-2-3

If your current giving solution won't share data, no need to worry, Vision2 does all the heavy lifting!

In fact, our automated approach takes the burden off you and your givers who just need to open the email, click a link, and complete their payment method. The result: an average of 95-98% gift migration!

- 1 Vision2 preps the data
- 2 You notify the members during service
- 3 Members are engaged via church emails and text



95-98%
of recurring gifts
are migrated using
the Vision2 process

Our Goal is 100% Satisfaction

What Our Clients Say

"We appreciate the support and relationship that we have had with Vision 2 for the past 3 years.

The refreshed webpage design, style and functionality has been well received by our ministry leadership team. Thank you for the guidance and design time investment in recreating the on-line giving experience for our congregation."

*Ted Dankovich,
Director, Finance & Operations*