

# Change Is Challenging **but We're Here to Make It Easier**

## We Do All the Heavy Lifting

When you join the Vision2 family, our team does the heavy lifting of creating a powerful, inspiring giving experience for your givers so your team can stay focused on what's most important. We strive for 100% satisfaction on each phase of implementation, especially with scheduled gifts. You're never on your own.

## Meet Our Team... We're With You Every Step of the Way

### Our Data Specialists

- Securely import people and household data to Vision2
- Securely import historical giving data to Vision2
- Manage integration between Vision2 and your ChMS
- Assists with the secure migration of recurring giving schedules

### Our Finance Specialists

- Match your church's fund structure in Vision2
- Create a general ledger output that matches your accounting practices

### Our Web & Communication Specialists

- Create a unique, engaging giving experience on your church's website
- Assist with all donor-facing communications, including your launch plan

### Our Training Team

- Provides personal, role-specific training for your team
- Provides ongoing training for as long as you need it

### Our Analytics & Reporting Specialists

- Create ready-to-use dashboard of reports so you can monitor and act on giving trends
- Provide support for creating custom reports and dashboards, as requested



**Vision2 is a full-service extension of your team.**

**From onboarding to ongoing success and support, we are a partner supporting you every step of the way.**

# We Make Preserving Your Scheduled Gifts a Breeze!

VISION 2

We know that disrupting your scheduled gifts is a primary concern. So we migrate them with little to no involvement from your givers. Here's how we do it:

## When your previous giving solution will share all data:

We electronically import all schedules and payment methods and reconnect them for a **100% conversion**.

## When your previous giving solution won't share data:

Our intelligent, safe and unobtrusive process helps donors quickly and easily migrate their recurring gifts with one click and only one form field to complete (payment method).

**PLUS:** We provide resources to support your launch strategy. Test drive our 1-click method:

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

[UPDATE MY RECURRING GIFT](#)

## We're Committed to Quickly Getting You Up and Running

### WEEK 1

#### Initial Set-up

- Kick-off
- Project review
- Collect baseline information



### WEEK 4-5

#### Finalize & Train

- Finalize all campaigns, content and communication
- Confirm financial set-up
- Roles-based training



### WEEK 2-3

#### Configuration

- Giving Experience Design
- Finance Mock-up Configuration



### WEEK 6-8

#### Launch

- Go-Live!
- Migrate recurring schedules
- Execute communication plan



*Onboarding is a partnership between your church and Vision2.*

*Most churches complete all phases over the course of 6-8 weeks, depending on church staff availability and timeliness of approvals in each phase.*

**Let us show you the Vision2 difference. We're here to help.**