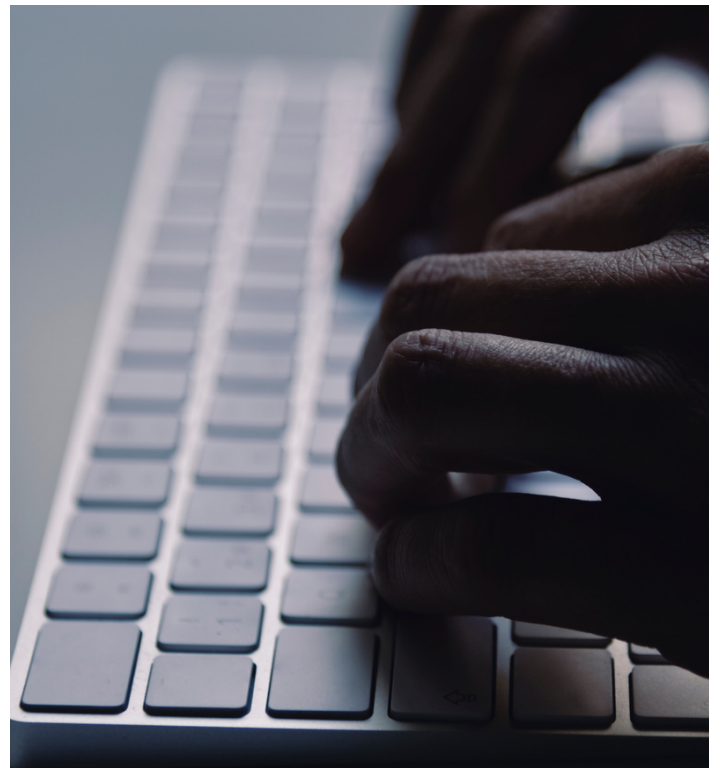


The ministry leader's journey to any solution starts with a dilemma and a call to bravely navigate pitfalls and possibilities to achieve transformation.



GIVING GROWING PAINS

A Before-and-After
Case Study of the
Typical Vision2 Client



The Hero's Journey

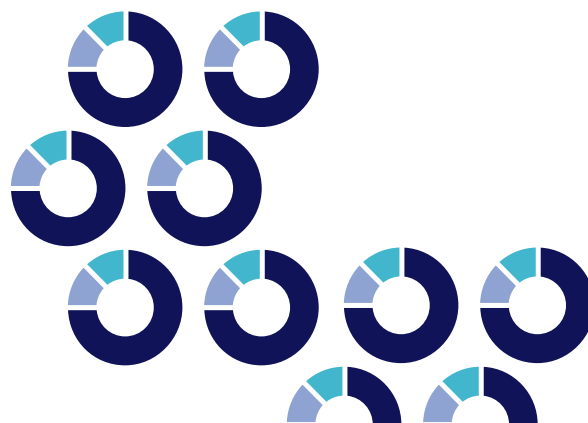
This is the tale of a hero on a quest to solve his church's giving challenges.

The case study follows not one specific church, but a fictional Executive Pastor and his team. They depict the typical, aggregated, pre- and post-Vision2 experiences our clients have shared with us throughout our 11 years helping churches effectively engage givers.

A hero is someone who, in spite of weakness, doubt, and not always knowing the answers, goes ahead and overcomes anyway.

CHRISTOPHER REEVE

Chapter 1		
THE DILEMMA		3
Chapter 2		
WHEN THE PAIN OF "SAME" IS GREATER THAN THE PAIN OF CHANGE		4
Chapter 3		
THE SEARCH FOR A SOLUTION		6
Chapter 4		
THE ANSWER EMERGES		7
Chapter 5		
THE FINAL DECISION		8
Chapter 6		
THE SMOOTH TRANSITION		10
Chapter 7		
THE GLORIOUS TRANSFORMATION		11



Chapter 1

The Hero's Dilemma

As an Executive Pastor, one of Jim's biggest challenges is stretching the budget to cover operational expenses, community outreach and, hopefully — one day — the new campus Senior Pastor Chuck has envisioned.

With the addition of online services, attendance is actually up slightly. However, giving has been flat for the past 6 months. Lack of growth, combined with the uncertainty of the times and the inability to accurately forecast revenue are causing a great deal of stress.

It's time to do something about it.

A staff meeting to discuss ideas for how to boost donations results in a few oft-repeated fundraising ideas and possible budget cuts, but nothing sounds promising.

They sit in silence. Jim and the staff feel helpless.



Then Stephanie, the Stewardship Pastor, shares that their web guru has noticed WAY more visits to the giving page than completed gifts. "He thinks the issue may actually be with the online giving system itself," she says.

Ramona, the Finance Director, jumps on that idea. "I agree! Our current platform gives me fits in the back office. Check processing and bank reconciliation are a nightmare!"

Pastor Chuck chimes in that he really needs better real-time reports on the church's giving trends to help him plan the church's direction.



Chapter 2

When the Pain of “Same” is Greater than the Pain of Change

Jim had inherited the current giving system and hadn't ever really given it much thought. He assumed it was working fine, falling back on the old “No news is good news” assumption.

He schedules meetings with each staff member individually to hear their complaints and priorities for a new system.

The team's feedback is surprising. Jim summarizes the “pains” the staff shared about their current system...

The Pain of Lost Revenue and Uninspired Givers

Jim is shocked to learn that 83% of the people who visit the church's giving page leave without ever making a donation.

A survey reveals that members are uninspired by generic, text-only giving options. Some are worried about security and privacy and find the current giving platform confusing and frustrating.

The fact that their thank you emails come from the payment processor, not the church, is also troubling. Ramona confirms that her office has received a few calls from givers fearing that they had fallen for an online scam when they received those gift acknowledgments from a third party and not the church. “The thank you emails should come from us,” she argues.

65%
of charitable
givers would
give more if
they knew the
impact of their
donations.

Fidelity Charitable

The Pain of Expensive and Onerous Vendors

Jim is painfully aware of the high monthly fees the church is paying for their giving software (more than \$8,000 per month!). The church could certainly use the \$100K a year more effectively, but the current contract he inherited from his predecessor still has 12 more months on it.

What upsets Jim even more is discovering that the current giving system quietly binds givers to 19 pages of legalese when they make their first donation. No wonder so many of their members, especially the Baby Boomers, are wary of the system.

The Pain of a Woefully Laborious Back Office

A closer review with the Finance team reveals that processing paper checks requires too many volunteers and is often only completed several days after the weekend services.

Ramona explains that reconciling the cash, check, and credit card deposits with the bank is a nightmare, with batched donations that don't correspond to individual gift amounts requiring intensive manual labor.

And when there are issues such as refunds or insufficient funds, the church staff cannot handle it themselves ... everything is controlled by the credit card processor which, according to Ramona, "is not exactly church friendly."

Growth happens when the pain of staying the same becomes greater than the pain of changing.



The Pain of Flying Blind Without a Map

Jim agrees wholeheartedly with Pastor Chuck's need for robust reports on giving trends. Jim knows he couldn't have survived without financial trend reports in his business career, so how could he effectively lead a large church with multiple campuses and thousands of members and visitors without accurate forecasts on giving, especially during a pandemic crisis or a recession?

Jim adds his own dream feature to the list ... for the giving data to sync seamlessly with their Church Management System (ChMS) so he can see a holistic view of each members' personal journey.

The Anticipated Pain of Change

Everyone, including Jim, dreads the disruption of switching solutions and worries they'll be called upon to perform technology tasks outside their skill levels. How steep will the learning curve be? Will they be able to keep their current ChMS and online giving schedules?

Down deep, Jim knows they are at a critical point now.

Change is required in order to begin growing again.

Chapter 3

The Search for a Solution

We cannot solve the problems we face with the same thinking we used when we created them.

Albert Einstein

Jim spends his morning researching giving software. By the end of the day, he feels frustrated and no closer to a solution. It's really hard to compare apples to apples ... and every solution claims to be the best. Shouldn't giving be easy and affordable so churches can focus their time, energy and finances on ministry?

He makes a few calls to other churches in their network. Surprisingly, few seem pleased with their current giving system. Many share similar "pains" as those Jim had documented. They wish him well with his search, saying "Let us know if you find something better. We would definitely consider making a switch!"



Chapter 4

The Answer Emerges

Jim's final call is to a California church. At last, a glimmer of hope! They have been using a giving solution called Vision2 since its inception and even consulted on feature developments.

He's never seen anything like Vision2's media-rich Give Stories on the church's giving page. Images and descriptions for each fund engage givers by clearly showing all the ways their gifts will make an impact in their church, community and world.

Apparently, this features helps Vision2 clients see a 17% average digital gift increase for non-recurring gifts in the first six months.

Jim sees that this is the opportunity lost if they continue using a giving platform that doesn't convey impact and engagement.

He's not ready for an aggressive sales pitch, so he downloads a guide from Vision2 called "[The Deadly Sins of Online Giving](#)." It describes 5 common obstacles to generosity found in most systems that lead to gift abandonment, obstacles that Vision2 addresses.

Jim has to admit he'd been turned off from online transactions in the past by the very hurdles described in the document.

Could this be happening with their givers?

He makes a quick call to his current giving provider to ask about getting out of their contract. It's not possible.

But then Jim realizes that since Vision2 doesn't charge a monthly subscription fee but does increase gifts, he can move his giving to Vision2 now and simply ride out his current contract.

Jim takes a closer look at Vision2's church and business partners and is pleased with what he finds. Other

Jim realizes that since Vision2 doesn't charge a monthly subscription fee but does increase gifts, he can move his giving to Vision2 now and simply ride out his current contract.

notable churches, such as Saddleback Church, Mobberly Baptist Church, The Crossing Church, and Saint Louis King of France Catholic Church rely on Vision2's giving platform. Vision2 also partners with the Christian Stewardship Network and works closely with MinistryPlatform and PCOGuru.

Vision2 integrates bi-directionally with the leading ChMS solutions. And it can easily push data to accounting solutions like ShelbyNext Financial, Intacct, Great Plains, Quickbooks, Netsuite ... and more.

Chapter 5

The Final Decision

Finally, Jim is ready to invite a Vision2 representative to demonstrate the software to the staff and answer their questions. Each staff member's concerns, questions and wish lists are addressed. Some of the highlights the representative points out are ...

Best for the Giver

The giving form is seamlessly embedded right into the church's website, ensuring the donor feels safe and secure.

Giving options are displayed with rich imagery and descriptions, which inspires greater generosity. Personalized communications from the church (not a third party) help to make the giver feel "known" by the church and meet them at the right place on their giving journey.

An intuitive self-service portal allows donor to manage their giving schedules, print tax statements and more.



Best for the Back Office

Fully integrated single check scanning, once for all systems (giving, ChMS and accounting), is extremely fast and accurate; they should easily complete the weekend offering the same day.

Proprietary "AutoReconcile" makes it easy to match cash, check, and credit card gifts to bank deposits.

Previously complex tasks like refunds and chargebacks are automated.

Fully customizable auto-generated tax statements can finally reflect the church voice, branding, detailed giving, pledge details, and more. A link to the statement can be sent by email or text to every giver, saving the church significant time and money in printing, mailing and managing returns.



Best for Church Leaders

Real-time, bi-directional integration with their Church Management System helps to eliminate duplicate records and provide a holistic picture of each member's giving journey.

Accessible data tools deliver simple, real-time giving reports, such as First Time Givers, Recurring Giving Patterns, and Lapsed Donors, that are invaluable for forecasting revenue and targeting specific donor segments.

"This giving platform is comprehensive, not complex."

Jay Tremblay
Grace Chapel, Franklin, TN

No monthly fees or giving limits of any kind mean those resources can be reallocated to ministries that sorely need it.

Chapter 6

The Smooth Transition

The final hurdle for the church—the one no one looked forward to—turns out to be a blessing.

The Vision2 transition team works so efficiently and so closely with Jim’s staff, explaining complex concepts in language they can understand, that he can feel their excitement growing as launch day approaches.

Even their Finance Director Greg, the last one on board with the change, has to admit he’s impressed with Vision2, with its unique partnership and integration of the giving forms, the church management system, the accounting platform and the bank. Plus, Vision2’s team of experts will be his team. From day one, they’ve done all the heavy lifting, from implementation, to accounting, design, content and tech support.

Launch day arrives sooner than they could have imagined. Vision2 seamlessly transfers existing

recurring gifts into the new system. The Vision2 team equips Stephanie (Stewardship Director) and Julie (Communications Director) with all the content they need to successfully promote the church’s new and improved giving experience on the church’s website, via email and on social media.

Within hours, gifts begin to roll in. Jim is pleasantly surprised to see how many Baby Boomers give online with no trouble at all. On Sunday, Pastor Chuck models the new giving system for the church, using Vision2’s Give Stories to show them exciting new ways to become actively involved in ministry.

Ramona reports that processing the offering takes a fraction of the time it had before, freeing up both volunteers and finance staff.



“Getting started with Vision2 couldn’t have been smoother!”

It is so simple, we had givers in their 70s using it right from the start.”

***Chuck Smith
Former Pastor,
Sylvan Abbey UMC***

Chapter 7

The Glorious Transformation

Jim settles in at his desk. He recalls that not long ago he'd been filled with concern about how they would meet the obligations they already had. Expansion hadn't even seemed like a possibility.

Now, he turns to the folder on his desk, a proposal for the new campus remodel. It's still early days on this project, but Jim feels encouraged by the way things have gone during the potentially disruptive giving software transition.

Vision2 made it easy. Once their old contract is up, the church will be saving thousands of dollars every month and giving and engagement are already on the increase. Vision2 helped his team collaborate together on a common project. And they made him look like the hero. Pastor Chuck had complimented his decision and leadership throughout the transition.

With the foundation laid for growth and the ability to forecast revenue with Vision2's accessible data tools,, Jim knows the team is ready to step out in other areas. He's confident they're ready for the church's future.

Jim recalls his conversations with other Executive Pastors who shared similar struggles to those he once had. Excited to share what he's learned, he picks up the phone ...



God is so good! You and your staff have enabled us to get where we are today. I am forever grateful and thankful for all the time and effort you and your staff have given to us. It takes a team!!

***Colleen McKenna
Dream Centers of Michigan***

Ready to learn more?

Vision2 is more than giving software.
A true solution like Vision2 solves
your church's giving challenges.

Do Good. Better.™

Contact Us:

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- 🌐 www.vision2.com

Our Promise:

As your partner, we'll support you every step of the way.

