



# 5 Easy Steps to Transition Your Giving Platform

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# How to Transition Your Giving Platform

- 1. WORKFLOW.** Consider changes in your workflow that will occur within your organization. Not all platforms are apples to apples. You're likely moving to a platform that has better and more robust tools. Be sure that you thoroughly understand these new tools so you can leverage them successfully.
- 2. THE PLAN.** We suggest overlapping your current and new giving platform for 1-2 months depending on the size of your church to ensure a smooth transition.
- 3. RECURRING GIFT TRANSITION.** Ensure your recurring givers transfer their gifts to the new platform.
  - A.** Run a current list of recurring gifts and communicate to these recurring donors that a change in their giving platform is being made.
  - B.** We suggest verbal and email announcements as well as information on your website. You may have some members that will require individual follow up (call or email).
  - C.** Consider sending one email a week for a month before the previous platform is cut off. Be clear in your email about what day the transition will be made and when the old platform link will no longer be available.
- 4. NEW FEATURE SPOTLIGHT.** If there are new features in your giving platform that were not available in your previous giving platform, ensure that you showcase these new features clearly and with excitement. This will help inspire donors to make the transition sooner rather than later.
- 5. GIVING GOAL.** Create a giving goal and celebrate the progress with your congregation each quarter. When people see progress towards a goal, it reinforces their habits and reminds them of the purpose behind their gifts.

## Ways to encourage your members to adopt your new Giving Platform.



1. Have a kick off day where you show and tell. Have everyone give \$1 together on the new platform to see how easy the new process is and that they can start the habit of giving on your new platform now.
2. Use it as an opportunity to tell the story of why it's important to give and where their dollars go. Use the power of video so that people can see the faces and the stories behind the dollars.
3. Walk through each fund you have set up as a reminder of the different initiatives your members can give to.
4. Set up a special "giving info table" in your church to be a physical reminder of your giving initiative and to answer donor questions during the transition.
5. Empower "giving ambassadors" to present information about each fund on a deeper level. This will help your members understand the depth of the impact that their dollars will have.