



Step-by-Step Guide to Launching Realm eGiving

Congratulations! You've implemented Realm eGiving in your church office. But now what? It's time to let your church family know about their new giving options.

We've worked with thousands of churches to implement and launch Realm eGiving, and we've pulled together resources and tips we've learned along the way to give you this step-by-step guide to help you.

Here's what we'll cover:

- Pre-launch checklist
- Communication strategy
- Recurring Givers Migration Plan
- Post-Launch Actions

Pre-Launch Checklist

Before you can launch Realm eGiving, there are a few things you need to have in place to ensure success.

Set Up Your Custom Giving Form in Realm

Design your custom giving form to include your church's logo and brand colors. This will build trust with your donors as they will easily recognize your church and feel more confident they are giving to the right place online.

Choose a Text Giving Keyword

Text giving is the best way to encourage giving for new visitors and guests who may not be familiar with your church's website and won't have access to your church's mobile app just yet. Select a text giving keyword for your giving form that makes sense for your church. We recommend an acronym or a shortened version of your church name.

Select the Funds Available on your Giving Form

We recommend having your most-used funds available for donors to choose from on your giving form. Having all of your funds available can be overwhelming, so select the top few, such as your general giving fund, missions, children and youth, and any seasonal funds offered at the time of launch (Easter Lily Fund, for example).

Write a Thank You Message

Edit the Thank You Message for your giving form to show appreciation to your donors for supporting your ministry. This small step goes a long way in showing donors their gifts are valued in driving your ministry forward.

Add Your Giving Form to your Website

How you do this step depends on your website, but we recommend having "Give" in your top navigation so it is easy to find. You can have that Give button go straight to your online giving form or build a Give webpage that highlights all of the ways a donor can give, including your text giving keyword and number, your address for mailing checks, and information about your church's mobile app. Your giving form in Realm includes all the links and embed codes needed for what works best for your church.

Things to Consider:

- Select the "Allow contributors to dedicate a gift" option when setting up your giving form to allow an In Memory/In Honor giving option.
- When customizing your Thank You Message, select the option to "Allow contributors to add a pledge with a recurring gift" if you have an active pledge campaign. This will give your members the opportunity to turn their recurring gifts into an online pledge, helping you meet your campaign goals.
- Turn on the option for your contributors to be able to cover processing costs associated with their gifts in your giving settings in Realm. This will help offset those costs for your church.

Communication Strategy

Now that you have your giving form and settings in place start thinking about how you want to communicate your new giving options to your congregation. Think of all your communication channels and the audiences for each to help determine the best strategy for reaching the most people in your church.

Worship Slides

Your pre-worship slides are a great place to show your new giving options to your congregation. Add a slide that shows how they can give (your website, text giving keyword and number, and/or the mobile app option) and leave that slide there each Sunday so new visitors know their giving options.

Church Bulletin or Newsletter

If you distribute a church bulletin during your worship services or a newsletter by mail or email, add an announcement the first month after launch that draws attention to your new giving options. After that month, find a small place where you can include giving options permanently in each publication so new visitors and members can always find ways to support your church.

Email Campaign

Use Realm to send out a mass email to your church members letting them know you're moving to a new giving provider, the benefits Realm eGiving brings to your church, and how they can now give.

Social Media

Who isn't on social media these days? Utilize your social channels to post about giving options. Post a graphic or image to draw attention, and include how donors can give. Don't stop at the ask, though! Be sure to also include how gifts are used and praise reports from ministries that show how important tithes and offerings are to continued ministry in your church and community.

Posters and Rack Cards

It's always helpful to have printed materials in areas available, such as your Welcome Center or bulletin boards in your hallways, to announce your new giving options. Print posters or rack cards and place them strategically where new visitors and large crowds of members pass often to catch their attention. Consider also placing a few in your pews or pockets on the back of your chairs to let new visitors know how they can give.

Communication Tip

While all of the communication channels above reach different audiences, the best way to reach the members and visitors sitting in your church each week is through your pastor. Have your pastor make an announcement about your new giving solution, along with how giving matters to your ministry.

Recurring Givers Migration Plan

When moving from one giving solution to another, the top concern is mostly recurring givers. How do we get them to move their recurring gift from our old solution to Realm? How do we track when they've done it? How can we help them?

Realm has an awesome feature that takes care of this for you - the Recurring Giver Migration Tool.

This tool allows you to import recurring givers from your old giving solution to Realm eGiving. This lowers your church's risk of missing gifts during migration and saves donors from starting from scratch in setting up their new recurring gift.

This tool will send an email to congregants, one for those with a Realm log-in and one for those without a Realm log-in, prompting them to update their payment methods. They can follow the link in the email, log in or create their Realm account, and update their payment method. Their gift amount, fund, and frequency will be pre-populated but can be edited. The best part...you can track it all on a migration dashboard within Realm.

Read more about this tool in our [Help Center](#) and plan when you will migrate recurring givers to Realm eGiving.

Tip: Be sure to communicate to your recurring donors they will need to cancel their recurring gift in the old giving solution or if you are able to do this on their behalf once they have migrated their gift over to Realm eGiving.



Post-Launch Actions

Once you've launched Realm eGiving, come back to this guide and let's talk about post-launch actions you should take to keep giving top of mind in your church. Giving shouldn't stop at the launch but continue to increase to support the growth happening within your walls and in your community. Here's some actions you can take to go a step further than launch.

Tell the impact

So often, we get the how communicated but not the why. When you're telling your members and visitors how they can give, stop and think about why they should give. What ministries are thriving in your church and community due to their faithful gifts each week? How many lives have been touched by mission projects that have been funded by your faithful donors? Capture those stories and share them often. And you don't have to reinvent the wheel! Use the same communication channels we covered earlier and record a short video, share a story through images, or share stats that tell the great impact financial gifts are making through your church.

Thank your donors

A "thank you" goes a long way. Find ways to acknowledge and thank your donors often. Have your pastor give a heartfelt thank you from the pulpit. Use Realm to send personalized emails to your most faithful donors, acknowledging how much they support your ministry through their tithes and offerings. Send a hand-written thank you to those who supported a specific ministry or event to let them know how much their gifts are appreciated.

Utilize Online Pledging

The more ways you can use Realm, the more familiar your members will be and the more likely they will continue to move to adopting new ways of doing ministry, such as pledging online. Realm Online Pledging removes the hassle of pledge cards and goes even further by allowing those pledging to set up a recurring gift so their pledge will automatically be met. Utilize this feature for your next campaign to show those who may not be using online giving yet how easy it is to not only pledge but also give and set up recurring gifts online.

Encourage Recurring Giving

Recurring giving has many benefits, one of which is knowing that your church will receive those gifts each and every week or month. Having those gifts to count on relieves your leaders and provides a way for your members to faithfully give without hesitation or forgetfulness. Remind your members of God's call for us to faithfully give to Him through His Church, and encourage them to prayerfully consider setting up recurring gifts.

