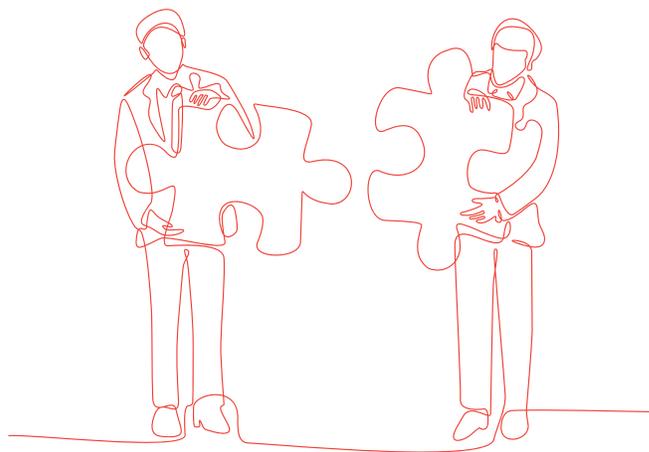


FROM **chaos** TO **clarity**

YOUR CHURCH SYSTEMS AUDIT

If you're reading this, you've probably reached that familiar crossroads where your church's technology feels more like a puzzle with missing pieces than a helpful ministry tool. Maybe you're juggling five different platforms just to send an email, schedule volunteers, and track attendance—or perhaps you've caught yourself wondering if there's a better way to manage all the systems that keep your ministry running. You're not alone! This comprehensive audit worksheet is designed to help your staff team take a step back, breathe, and get a clear picture of where you are and where you want to go with your church technology.

By the time you complete this assessment together, you'll have a clear understanding of your current technology landscape, a realistic picture of costs (including those sneaky hidden ones!), and a practical action plan for moving forward. Whether you end up consolidating into one powerful platform or simply optimizing what you already have, this process will help your team work more efficiently, collaborate more effectively, and ultimately spend less time wrestling with technology and more time focusing on what matters most—ministering to your community. Let's dive in and discover how technology can become your ministry's greatest ally rather than its biggest headache!



Here's what is included:

- ▶ **Ministry Area Inventory Worksheet** to discover what systems each staff member uses, for what purpose, and cost
- ▶ **System Analysis Worksheet** to break down the best and worst of each current system
- ▶ **Cross-Ministry Collaboration Chart** to help your staff work together to discover who's using systems to do the same task
- ▶ **Financial Analysis Worksheet** to pull together all of the costs (and hidden costs!) of your current systems
- ▶ **Team Discussion Prompts** to help start the conversation of what systems may be best for your team moving forward
- ▶ **Vendor Evaluation Checklist** to guide your journey to choosing the best platform for your entire ministry team

Ministry Area Inventory

Instructions: Each staff member should complete this section for their ministry area(s).

Ministry Area: _____

Staff Member: _____

Date: _____

Current Systems

Instructions: List every system, software, or platform you use in your ministry area.

System Name	# of Users	Primary Function	Secondary Function	Monthly/ Annual Cost

System Analysis

Instructions: Make a copy of this page for each system listed in the Current Systems section and complete it for each system.

System: _____

Core Functions

- | | |
|--|---|
| <input type="checkbox"/> Communication/Messaging | <input type="checkbox"/> Open API |
| <input type="checkbox"/> Event Management | <input type="checkbox"/> Automation Options |
| <input type="checkbox"/> Volunteer Management | <input type="checkbox"/> Financial Tracking |
| <input type="checkbox"/> Donation Processing | <input type="checkbox"/> Reporting/Analytics |
| <input type="checkbox"/> Member Database | <input type="checkbox"/> Check-In Functionality |
| <input type="checkbox"/> Group Management | <input type="checkbox"/> Other: _____ |

Integration Status

- Integrates well with other church systems
- Limited integration capabilities
- No integration with other systems
- Unknown integration status

User Satisfaction (1-5 Scale)

Ease of Use: ___/5
Reliability: ___/5
Customer Support: ___/5
Value for Money: ___/5

Pain Points

Essential Features (cannot live without)

Financial Analysis

Instructions: Complete this section based on all of the System Analysis worksheets.

Current Total Costs

Cost Category	Monthly Cost	Annual Cost
Software subscriptions		
Training Costs		
IT Support and/or Maintenance		
Staff time for system management		
TOTAL		

Hidden Costs Assessment

Time spent switching between non-integrated systems: ___ hours/week

Time spent on duplicate data entry: ___ hours/week

Time spent troubleshooting system issues: ___ hours/week

Training time for new staff: ___ hours per new hire

Team Discussion

During your staff meeting, work through these questions together. Capture the most common responses and significant insights in the spaces below—these will serve as reference points throughout your evaluation process.

What surprised you most about our current system usage?

Where do we see the biggest opportunities for improvement?

What are our biggest concerns about consolidating systems?

How might a unified platform change how we collaborate?

What would success look like for our church specifically?

Vendor Evaluation Checklist

Platform Name: _____

Functionality Match

Meets ____% of our must-have features

Addresses ____% of our current pain points

Implementation Factors

Data migration complexity: Low / Medium / High

Staff training required: ____ hours

Go-live timeline: ____ months

Vendor support quality: ____/5

Cost Analysis

Monthly cost: \$____

Setup/migration cost: \$____

Training cost: \$____

Total first-year cost: \$____

Total annual cost (after first year): \$____

Projected annual savings: \$____

Final Recommendation

- Strongly recommend
- Recommend with reservations
- Do not recommend

Notes

Next Steps Action Plan

Here's a checklist to help you move towards unifying your systems for cost and time savings for your staff and ministry.

Immediate Actions (Next 30 Days)

- Complete system inventory for all ministry areas
- Calculate total current costs
- Assign point person for evaluation process
- Research 3-5 potential unified platforms

Short-term Actions (Next 90 Days)

- Demo top 3 platform candidates
- Get pricing quotes for unified solutions
- Conduct cost-benefit analysis
- Create implementation timeline

Long-term Actions (Next 6-12 Months)

- Make final platform decision
- Plan data migration strategy
- Schedule staff training
- Evaluate success metrics



We hope this audit guides your team to unify platforms
and simplify your ministry's administrative load.

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