



**7 FREE**

**TEMPLATES**

**FOR MINISTRY**

**WORKFLOWS**

***ESSENTIALS FOR DEVELOPING HEALTHY SYSTEMS***

**SOLUTION GUIDE**

The tools and tips you need to develop healthy systems through workflows. PLUS... how our software, Realm®, can help you achieve this ministry goal.



# *Workflows: The Building Blocks of Systems*

Workflows are a great way to piece together a system based on the ways you do things uniquely at your church. They should be simple enough for anyone to follow but thorough enough to ensure nothing slips through the cracks.

Once crafted, workflows can be structured to inform, educate, and follow through with all the things that matter to your church.

The following are a few of the most common workflows a church needs. Remember, these are templates. That means you'll need to make some adjustments. Every church is unique. Templates, by their very nature, are not. And yet in these you'll find the basic structure of a healthy workflow and checklists that will get you thinking and heading in the right direction. Feel free to use as is or with your own custom modifications.

## EACH TEMPLATE CONTAINS:

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- Boilerplate language to help your team understand why it matters.
- A brief list of items you'll need.
- A checklist to walk people through a process.
- An expected outcome to gauge success.

We hope these workflows - once customized to your context - free up your staff and volunteers to do more ministry, do it better, and function in the confidence of knowing you're backed by some pretty sound, time-tested systems.





## *New Visitor Follow-Up*

Every person who walks through your doors is valued by God and looking for purpose in their life. They have come for a reason. So give them a reason to stay by making them feel welcome and giving them an opportunity to connect.

### WHAT YOU'LL NEED

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- Online member directory
- Shared place to record and track your interactions
- Greeters who are trained to identify and follow up with new people
- Clean and simple website to point people to events, surveys, and contact information
- Clear messaging, talking points, and opportunities to connect

# CHECKLIST

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When you meet and follow up with a new visitor, make sure you:

- Start with a warm greeting.** Ask them a question or two about themselves without getting too personal. Ask anything FORD (family, occupation, recreation, dreams) and avoid anything FAP (finances, appearance, politics).
- Provide an opportunity for feedback** on their first visit. This could be a connection card they fill out or a link to an online form you share from stage.
- Gather their contact information.** This is the secondary (but maybe more important) purpose of having them fill out a card or survey.
- Send them an email** within the first few days of their visit while it's still fresh in their minds. This should include the best, first places they can connect (groups, newcomer class, special events, personal meeting).
- Give them a (online) survey** to see what they thought of your church. This should include questions about worship, the message, kids' church, and greeting. This engages them by giving them ownership of their experience and provides you with critical information.
- Place a personal call.** This is an old practice that has replaced the house calls of days gone by. It might seem old fashioned and unscalable to call every visitor, but it leaves a lasting impression when a pastor or leader takes the time to call.
- Back off** after the initial follow-up to let them engage at their own pace. Give them some breathing room, then talk to leaders and volunteers to see if they are reaching out.
- Remind them** of all the cool stuff happening at your church and how they can plug in with a reminder email sent out two weeks after their first visit.

# OUTCOMES

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If you nurture the follow-up process correctly, you'll see more people finding the connection they are looking for, which will lead them to stay, increasing your growth and engagement.



# Setting Up Small Groups

Groups are often the lifeblood of any church. They are the place where people grow in their faith, make meaningful relationships, and form lasting connections to the Body. A church of healthy groups will be a healthy and growing church.

## WHAT YOU'LL NEED

- Online group directory
- Group communication platform
- Group descriptions and information generally available

## CHECKLIST

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- Set a calendar** for your groups season. Good results have been seen with a variety of calendars. Just make sure people know when groups start, stop, and break.
- Recruit group leaders and hosts** by identifying people with appropriate giftings and circumstances to do both well.
- Train group leaders** to lead a discussion around an existing curriculum. Group leaders don't need to create the lesson (unless you want them to), but they need to facilitate it.
- Train hosts** to develop a comfortable atmosphere with clean bathrooms and minimal pet interference. They should also develop a snack rotation, which provides buy-in and fun.
- Decide on meeting locations.** These are most often homes but could be coffee shops, restaurants, the church building, parks... wherever people want to meet!
- Generate a description for each group** so people understand what they are getting involved in. Make sure to add expected outcomes for group participants
- Publish a group directory** (online and printed) that includes times, locations, leaders, curriculum, and childcare information/expectation.
- Promote your groups** from the stage, online (email, website, social media), and in person. Putting responsibility to recruit on group leaders is a great way to make personal invites.
- Foster group communication** by allowing group members to share details about upcoming group plans, event needs, prayer requests, and the like. An online group forum, Facebook page, or email train will work with the former being the best option.
- Gather and share group testimonies** during and after the group. The best way to increase group participation is to share the stories of transformation in past groups.

## OUTCOMES

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If you can clearly communicate the who, what, when, where, and why of groups, your people will want to engage. People will go where they know. Meaning people will attend groups if they know who is there and what they are getting involved in. Help them engage in groups and realize real growth.



# *Connecting People to Classes*

Heeding instruction and thirsting for knowledge are long-held Christian values. What better way to equip people and mature disciples than by connecting them to the classes they need to expand their knowledge and increase their faith?

## WHAT YOU'LL NEED

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- A place to meet or an online forum in which to present
- Accessible curriculum that suits your purpose
- A leader to facilitate or teach the class



## CHECKLIST

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- Determine the class curriculum.** What will you cover? What do you want the people to learn or take away from this course? This could be existing or newly created.
- Set a time and place to meet.** Is the class a one-time meeting or ongoing? How many sessions will you need to cover the material? Does your meeting space have everything you need to facilitate the attendance level and needs of the class?
- Cover the material with the teacher.** If you are the teacher, review the material with another leader to make sure you get it. If you are training the teacher, make sure they know the material well enough that they can answer tough questions that a student might ask. Know it, have examples for it, and be able to speak on it freely.
- Promote the class.** This includes inviting people on social media, via email, in private group forums, and personally via phone or text. You should also put the class on the church website and, if it warrants stage time, put it into the announcements.
- Teach the class.** Make it a fun and memorable experience that involves student participation and peer-to-peer feedback and education.
- Seek feedback** by asking the students to fill out an online or paper questionnaire about what they got out of the class.
- Make adjustments** based on what you observed and the feedback of the students. Remember to adjust only what's needed to get the results you want.
- Do it again** or shelve it. That's right. Scrap the class if it's not drawing people or having a positive effect on their growth. Different seasons of the church will require different classes. If it's not worth fixing for maximum effect, save it for later or toss it entirely. If it's producing results and people are responding well, do it again!

## OUTCOMES

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An effective class will leave people with lasting lessons they can apply to their lives. As you gain feedback from the class, you'll determine how fruitful the class has been. The outcomes should be a more informed church body that is inspired to attend more classes, dive into groups, and increase their regular attendance as they see the rewards of learning about God.



# *Getting People to Serve*

Serving in a ministry team is as formational as getting involved in groups. As people serve God together, they build relationships and see God moving in the lives of the people around them. It increases faith and understanding. It's good for the church and great for the people.

## WHAT YOU'LL NEED

- Volunteer management system to communicate and schedule volunteers
- Clearly defined teams and roles
- Compelling mission that provides motivation to serve

## CHECKLIST

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- Cast the vision.** People need to know again and again why they are serving. This means crafting vision in such a way that people can see how their (sometimes menial) effort affects something bigger than themselves. Paint the picture of why their contributions matter to them and to the church as a whole.
- Share stories** of other volunteers who have had their lives impacted by serving.
- Define the needs** within the church and show how they are an opportunity to move ministry forward, not just to maintain the status quo.
- Call people out** and into purpose. This means identifying particular individuals to join the team - rather than a churchwide cattle call - just like Jesus did.
- Train leaders** to do the same. All leaders should be in the business of identifying and empowering people within the church to live out their giftings through serving.
- Communicate next steps** clearly. Volunteers need to know how to:
  - Sign up to serve.
  - Get equipped with the knowledge and tools they need to serve well.
  - Set boundaries so they don't burn out or get overwhelmed.
  - Make a change if they feel unsuited for their current role.
  - Share the opportunity with other people they know who might be interested.
- Create role/job descriptions.** Nothing turns off new volunteers like the uncertainty and awkwardness of not knowing what's expected of them. Set clear, realistic expectations.
- Provide a feedback forum.** Allow volunteers to discuss their pain points, where they need help, and even celebrate wins. An online group is a great way to foster healthy interactions among team members and communicate important updates.
- Celebrate!** When something good happens as a result of a volunteer's efforts, promote it, share it, and use it as an example of how God can use anyone to help everyone.

## OUTCOMES

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When your whole church is serving, people will grow in their faith and the church will grow in depth, purpose, and numbers. Simply put: serving fuels ministry.



# *Recording Donations*

Essential to good stewardship, donor confidence and ultimately increased giving is the good handling of donations. Recording donations may not seem super exciting, but it's an integral part of maintaining healthy practices, integrity, and a clear picture of the church's financial health.

## WHAT YOU'LL NEED

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- Online database of members with a place for donor records
- Safety protocols to ensure only the right people are accessing donor records
- Method for receiving and categorizing donations

## CHECKLIST

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- Define funds.** Will people be giving to a general fund or a special campaign? Most Church Management Software solutions have a way to set up different funds for different purposes.
- Assign trusted people** to gather the donations and count them. These don't have to be (and if you can manage it, shouldn't be) the same people.
- Collect donations** via in-person contributions, online giving (recurring giving is ideal), kiosks, text giving, and so on. In-person donations should be consolidated for the next step. In-person donations should always be monitored by at least two people.
- Count them up.** Count in-person donations and write down each one with a total. This should be signed off by at least two trusted people and then digitally recorded.
- Input the records** into your giving solution. By entering your in-person donation records to your online giving solution, you'll have all your financial contributions in one place.
- Deposit the funds** at your bank and make sure that the amount recorded matches the amount of the deposit. Whenever possible, have different people deposit and count.
- Review for accuracy** by looking at your overall monthly bank deposit statement and matching it with your online giving records. If they don't match, you probably missed a deposit or, worse, had an intentional discrepancy between the count and the deposit.
- Send reports** to your donors on a quarterly, semi-annually, or yearly basis. Sending giving reports helps them see their overall giving picture and might inspire them to stay on track with their intended giving. If you have accurate records, this is an easy task.

## OUTCOMES

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When you know how people are investing their finances at your church, you not only get a better understanding of your budget but also you get a better understanding of your people's buy-in. Money is definitely not everything, but it can tell you a whole lot. You'll be able to plan better, disciple more, and cast vision grander than ever before. And let's not leave out that you'll have more resources to fuel more ministry!



# *Special Event Planning*

If Church is the Body, not the building, then events are integral to the Church. It's when people come together to worship in community that the Church is made manifest on earth. That to say, events are worth doing well. Special events have the added bonus of being evangelistic.

## WHAT YOU'LL NEED

- Online event post/page with all the event information
- An image to represent the event on web and social media
- Volunteers to contribute to and manage the event

## CHECKLIST

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- Determine a target.** Who is this event for? Families? Athletes? Singles? When you know who the target is, you'll be able to better plan the specifics of the event.
- Create a description** of the event that clearly explains all that will happen at the event and highlights all the reasons someone should attend.
- Identify needs.** Food (Catered? Food trucks? Potluck? Utensils? Napkins?), water, tables, chairs, sound equipment, lighting, trash, games, bounce houses, etc.
- Assign positions** to people who will be working the event. Don't forget to have people assigned to working the crowd with conversation and greeting. Other roles include: setup and teardown, working any tables, booths, or activities, food prep, MC, and AV.
- Consider the signage.** Putting out signs before and at the event provides: a) a constant but subtle reminder of who the benefactor is, and b) branding for the church.
- Enable on-site lead generation** by providing a sign-up sheet. A great way to get people to sign up or provide contact information is by holding a raffle or other prize/game.
- Promote your event** using all the tools at your disposal: announcements, social media, website, and signs. Online promotion should always include the event page/post link.
- Have a next step** for people to take at the event. It could be as simple as announcing your next event or weekend worship service.
- Follow up** with a general post or two about how the event turned out on the event page or post. But also follow up individually with everyone who provided contact info at the event. Don't just throw an event. Gather information and act on it!

## OUTCOMES

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Special events that serve the community and highlight the church's strengths have a way of drawing people to the church. What's more, the people at the church are more likely to share a special event than a recurring one, making special events a great evangelistic tool for church growth. If done right, special events gain favor in the community and growth for the church.



# *Adding New Kids' Workers*

If the kids' ministry isn't top notch, the church will be bottom of the list. The look and feel that kids' ministries convey is more important now than ever. Parents want - no, need - to know that their kids will have a great time in a SAFE and fun environment. Kids' workers (volunteers) are the key to unlocking the growth potential of a good kids' ministry.

## WHAT YOU'LL NEED

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- Background checking solution
- Member database with notes and family features
- Defined roles and responsibilities documentation for each position



## CHECKLIST

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- Discover new volunteers** by: a) combing through the church database to search for members who've expressed interest, b) talking with people you think might be a good fit, and c) asking the existing team members who they know.
- Explain the vision** in a way that highlights all the great opportunities available within kids church, and also what the wonderful outcomes of the volunteer's participation will be.
- Define the role.** Nobody likes walking into the unknown. Especially when it's a new environment or a completely new undertaking. Be clear about expectations.
- Make space for observation.** Once you have identified some candidates, let them sit in to check it out first hand. This often helps them foster a greater appreciation for the work.
- Do the background check.** If a volunteer is willing to undergo a background check, they're probably not going to flake out. Make sure this process is private and easy.
- Make an introduction to the kids.** Once your volunteer is on board, make a big deal about it with the kids. Let them get instantly familiar for the best experience for both.
- Celebrate the new member** at a team meeting or morning rally with the entire team. Nothing makes a new volunteer feel welcome like having the rest of the team cheer them on. Plus, it will help them make new relationships, leading to greater connection.
- Connect the dots** for your volunteer by continually reminding them of the impact they are making. When they get tired or overwhelmed, knowing how their effort plays into the advancement of God's Kingdom will fuel them on and grow their faith!

## OUTCOMES

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When kids' volunteers feel equipped and enthused, the kids will too. And if the kids have a great time, they'll tell their parents. And guess what, both parents, kids, and volunteers will become more connected, more educated, and more excited about their church involvement than ever before.



# ***BONUS: How to Create a Workflow Template***

Six workflows isn't enough to cover everything. So we thought we'd give you a template to help you create as many workflows as you want. It's a template-building template. Just follow this process in any area of ministry to create simple, effective workflows for your teams.

## **WHAT YOU'LL NEED**

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- Member database (seeing a trend here)
- Formatting (and optional, laminating) skills
- A good understanding of your needs and goals

## CHECKLIST

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- Assess your ministry** for areas of improvement. Think through all the areas where a workflow would empower team members toward excellence and maintain consistency (and in some cases, conformity) with a specific set of expectations.
- Get (or give) permission.** The method for this varies, but what's most important is that whoever is determining next steps has the authority to do so.
- Consider your team** and how they need to be communicated to. Will they need more long form communication? Or short, to-the-point instructions? How will your team best adopt your new systems? This will determine how you deliver the new workflow.
- Define the solution** you are trying to achieve. This is usually in response to either: a) a problem you need to solve, or b) an improvement you choose to make. Regardless of the motivation, you need to paint a picture of what it is your trying to accomplish so your team can jump on board and know what success will look like.
- Identify the outside tools or resources you'll need.** What software, insights, materials, or resources will this workflow need to get - and stay - off the ground?
- List the internal steps** you must take. This is the checklist and the meat of the workflow. When the checklist is followed, the solution is realized. If the solution is not realized by simply following the steps, then you have to go back and rework the checklist.
- Describe the outcome.** This differs from defining the solution in that it goes further. It casts the vision of what will happen if your solution is successful. For example, if your solution is to remodel the atrium, the outcome is a better guest experience, more returning visitors, and a welcoming atmosphere to fuel growth.

## OUTCOMES

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When your teams know what to do and why they are doing it, it empowers them to have a greater stake in the ministry as a whole. As a result, they will become the engine for recruiting, training, evangelizing, and giving. A well-trained team supported by clear and simple systems will do more for church growth than any other effort the church will undertake.



## *With a Little Help from a Friend*

Establishing healthy workflow templates that support good church systems is an important step in supporting the life and operations of your church. But good systems need to be supported by great tools.

Many of the ideas and tasks we've defined in the free workflows are made possible or more effective by a robust church management software like Realm.

Realm provides the online, all-in-one tools you need to develop and maintain community, accounting, and ministry systems for your entire church.

See how Realm can help your ministry by attending a [live demo](#) or taking our [self-guided tour](#). We also have industry-leading support teams, so making the switch to Realm is easier than ever before.

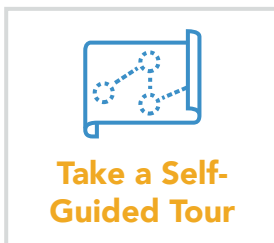
**WE HOPE THESE FREE RESOURCES ARE A BLESSING TO  
YOUR MINISTRY. ENJOY!**



Throughout this guide, you have seen several ways that Realm helps churches reach new people and manage the life and operations of a church. We're excited to share more about our revolutionary ministry tool, Realm.

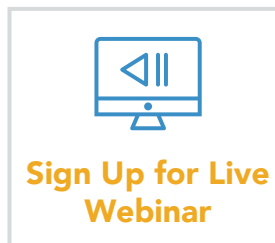
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We'd encourage you to explore all that Realm makes possible by taking a demo, walking through a self-guided tour, or speaking with an associate today!



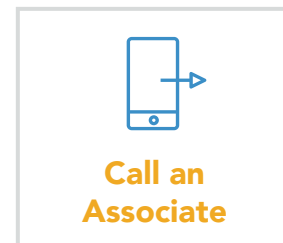
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