



ParishStaq™

LAUNCH KIT

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GENERAL BEST PRACTICES



No. 01 – **Overcommunicate**

Throughout implementation, there is no such thing as communicating too much. You are guiding your leaders and parishioners through several changes, and they will all need to hear about them repeatedly. Have the extra conversation, send the extra email, and make the extra announcement!



No. 02 – **Have "beta testers"**

There is no reason you need to publicly roll things out all at once. It is always a good idea to have a trusted group or team test out features and become familiar with them before rolling out to everyone. Usually, a good order for rollout is staff, followed by council members, key volunteers, then the rest of your parishioners.



No. 03 – **Determine Feature Sequencing**

ParishStaq comes with three tools: ChMS (Church Management System), Giving, and the Mobile App. The parish decides which order and when to roll out these tools. We recommend rolling out the ChMS and Giving, followed by the Mobile App.



No. 04 – **Roll out features incrementally**

It usually is not helpful to choose one date for all of your ParishStaq features to go live at the same time. Roll them out one by one, focusing on the fundamentals (like Giving, Groups, and Events) first.

GIVING LAUNCH BEST PRACTICES FOR PARISHES LAUNCHING PUSHPAY GIVING

We recommend rolling out and promoting Pushpay Giving (Giving) because this element will require the most communication with your parishioners. This transition will involve almost everyone at your parish and must be communicated with great care.

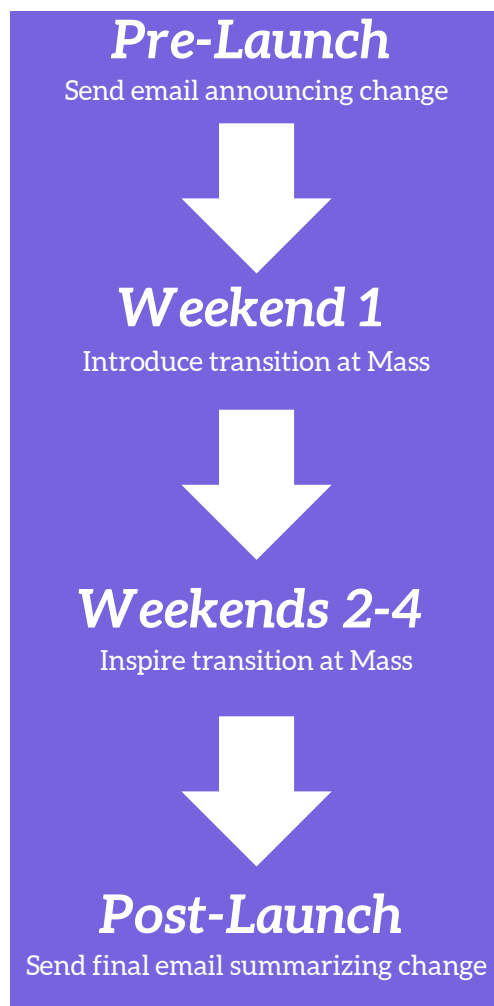
As you know, making people aware of any change and the benefits of that change are paramount for maximized adoption and success. We are confident in the Giving platform's ease of use, simplicity, and ability to engage new givers with the benefit of igniting generosity. Therefore, we want to equip parishes with some tools to assist with the communication about the new platform. With this in mind, we have a suggested "best practices" launch strategy for Giving, a process that should span 3-4 weeks.

A parishioner may only attend Mass 1-2 times a month, so continually communicating messages over a month's time ensures that your message will be received. We suggest communicating about the new Giving platform prior to launch, talking about it at Masses for 3-4 weeks, and then sending another summarizing communication afterwards.

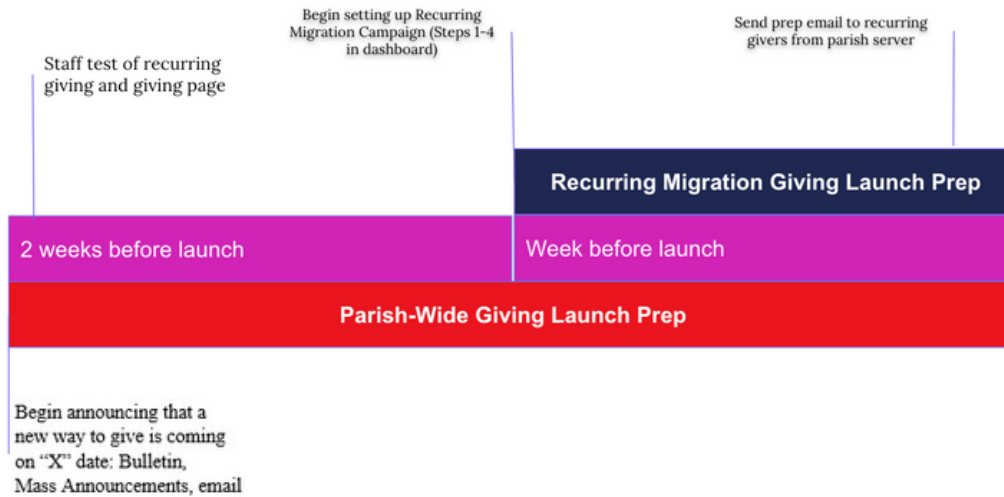
Pre-Launch Email: Send your Pre-Launch Email to your parishioners the Friday prior to Launch Weekend. You will want to let all your parishioners know about this new exciting way to give prior to announcing it at Mass. You may also consider including the links to try out different ways to give in your email, i.e. QR Code, online, etc. This will give parishioners the opportunity to try it out before Sunday.

Launch (2 weeks): Have a trusted member of your staff speak about the new Giving platform. We suggest using an information/inspiration approach. Use the points laid out in the "Talking Points" section to explain the "information portion." For the "inspiration" portion, let your parishioners know what their gift goes towards in your parish community. Always couple this with information on how a parishioner can give. A best practice is to have a "Call to Action" flyer or an article in the bulletin sharing the different ways to give (e.g. online, envelope, and QR Code).

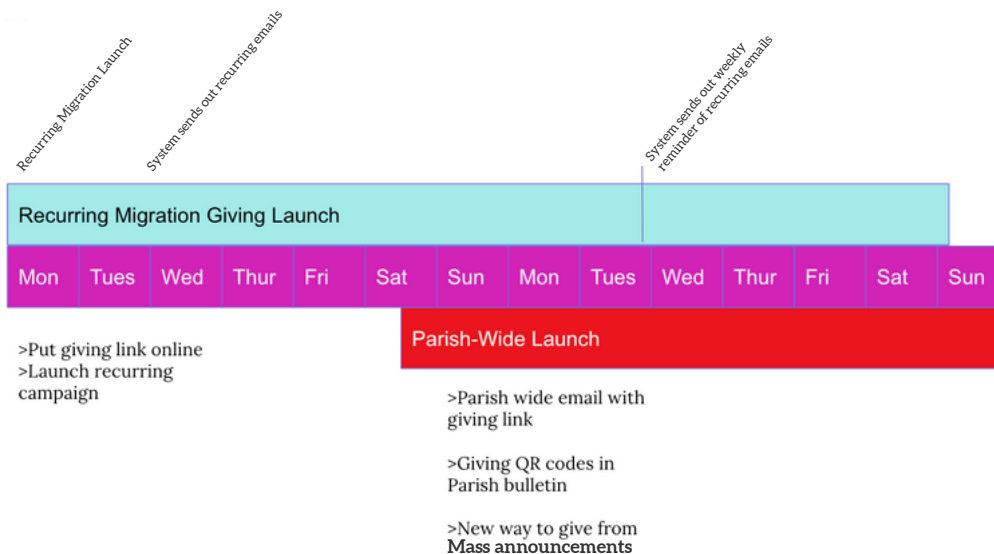
Post Launch (2 weeks): Have a trusted member of your staff or clergy repeat the information/inspiration approach, with a new inspiration portion each week. You want to make sure to share with your parishioners the HOW/WHAT, but it is imperative that they also know the WHY. A QR Code is a quick and simple way to get anyone to your giving page the first time they give.



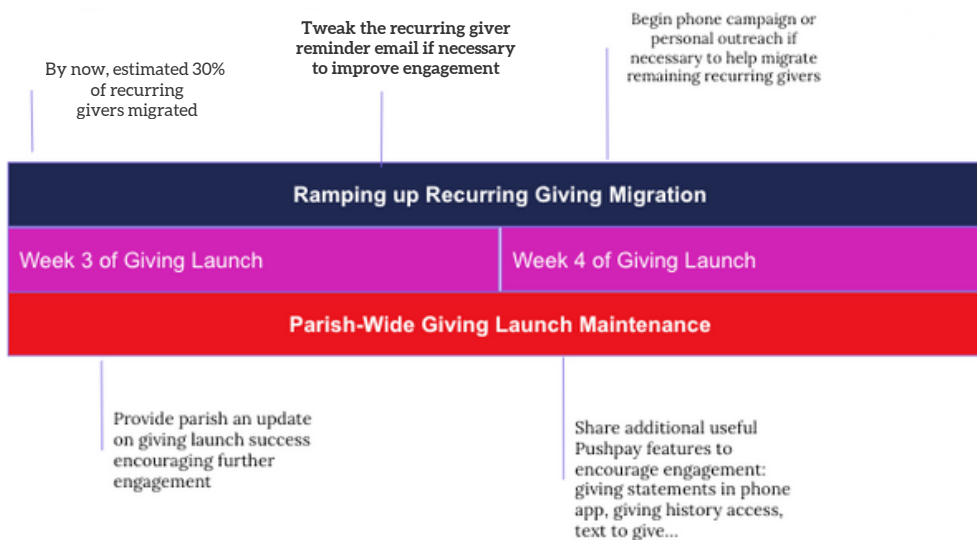
Pre-Launch Prep Timeline



Launch Week Timeline



Giving Launch Progress



Sample Giving Communication

Pre-Launch Email

Dear [Name],

Thank you for your consistent giving to [Parish Name]. We are grateful for your continued generosity. We are excited to announce a new way to give at [Parish Name]. Generosity of Time, Talent, and Treasure is how we are able to achieve the mission of the Church. We value our parish community and want to ensure everyone at [Parish Name] is aware of our exciting new Giving platform, which allows for simple giving through a variety of ways, including mobile and online.

As we move away from [third-party platform], we want to share why this transition is occurring. We have been reviewing our giving options for over a year before making this decision. Pushpay provides an integrated solution with our new ParishStaq system. This integration gives our parishioners a quick, easy, and secure way to donate. We strive to be good stewards of your financial gifts and believe the lower processing fees offered through Pushpay will allow your gift of treasure to go further in supporting the Church's mission.

It is our goal to complete this transition process by [Date] so we need your help in moving your current online giving to Pushpay. This simple two-step process will take no more than ten minutes. [We will have volunteers available the weekend of date after Mass at location/event to assist you with this process.]

Instructions for Transition to Online-Giving:

Part one: Setting up a new recurring gift using Pushpay.

Visit [unique webpage on your parish website] and set up your automatic gift using the Giving platform. The recurring option should already be selected, and you can simply set up your automatic gift, after which you will be prompted to complete the setup of your new account.

Part two: Cancel scheduled gifts in [third-party platform]

Once you have set up recurring gifts in the Giving platform, please cancel any scheduled gifts in [third-party platform]. Attached to this email are the steps to cancel recurring gifts. It is also recommended that you delete any saved payment methods. If you would like assistance with this, please contact [designated contact and info] and we will be glad to help.

If you have any questions, please call [phone number] or email [designated contact and info]. We are so blessed you have made the commitment to give in this way and are grateful for your decision to continue to support [Parish Name].

Blessings,

[designated contact and info]

Sample Giving Communication

Reminder Email

Dear [Name],

[Season greetings, i.e., Lent, Advent, etc.] We are grateful for your generosity and want to thank you for being an online donor. We value your time, and we hope to make the transition to the new online Giving platform as simple as possible.

If you have already made the transition to the new Giving platform, thank you! We appreciate your prompt attention to this matter. If you have not made the transition, please take a moment to move your recurring donation to the new Giving platform. Detailed instructions are included below.

We want to share again why this transition is occurring. After reviewing our giving options for over a year, we decided to launch a Giving platform, which provides an integrated solution with our new ParishStaq system. This integration gives our parishioners a quick, easy, and secure way to donate. We strive to be good stewards of your donation and believe the lower processing fees offered through the Giving platform will allow your gift of treasure to go further.

Part one: Setting up a new recurring gift using Pushpay.

Visit [unique webpage on your parish website] to set up your automatic gift. The recurring option should already be selected, and you can simply set up your automatic gift, after which you will be prompted to complete the setup of your new account.

Part two: Cancel scheduled gifts in [third-party platform]

Once you have set up recurring gifts in Pushpay, please cancel any scheduled gifts in [third-party platform]. Attached to this email are the steps to cancel recurring gifts. It is also recommended that you delete any saved payment methods. If you would like assistance with this, please contact [designated contact and info] and we will be glad to help.

If you have any questions, please call [phone number] or email [designated contact and info]. We are so blessed you have made the commitment to give in this way and are honored with your decision to continue supporting [Parish Name].

Blessings,

[designated contact and info]

Sample Giving Communication

Post-Launch Email

Dear [Name],

We are pleased to announce the launch of our new Giving platform. This new Giving platform makes it easy to give a one-time gift (i.e., CRS RiceBowl campaign) or recurring gifts. Giving can be from your smartphone anytime and anywhere during the week! Here are 3 simple ways to give:

1. Visit our website at [website].
 2. Scan this QR Code [insert QR Code].
- OR
3. Download our Church app.

If you have any questions, be sure to contact the parish office at [phone] or [email]
Thank you for your continued generosity!

Blessings,

[designated contact and info]

Sample Giving Communication

Talking Points

- Let's face it - we don't carry cash or a checkbook around with us today, so we've made giving easier than making a purchase on Amazon. There are three ways to give and they're all really easy!
- QR Code: Use your smart phone to scan the QR Code in the pews or in the bulletin. This will take you right to our online giving page, where you can make your donation.
- Giving Link on Our Website: Simply go to our website [insert where to find it on the website]. This will take you to a secure area and allow you to make your donation.
- Custom App: We have a new custom app called Our Catholic Community that you can download and stay easily connected with everything here at [Parish Name]! You can access homilies, events, and give right through the app. Simply grab your phone and text [Your Custom App Keyword] to [Your 10-digit number] to receive a direct link to download the app.
- ACH: We're also excited to be able to offer ACH giving because you can give directly from your bank account, which allows more of your donation to come directly to our parish. Simply navigate to the giving page using one of the methods described earlier, and choose "Give from Bank Account." Enter your account and routing numbers and give!
- With our new Giving platform, you can:
 - Give easily, quickly, and securely
 - Store multiple cards and bank accounts
 - Give recurring donations

If you have any questions, please let us know. We're excited about this easy way to give, and think you'll love it too!

Bulletin Announcement #1

We are excited to announce that on [date] our parish will begin using our new Giving platform by Pushpay. Pushpay is an industry leader known for creating an easy, secure way for you to manage your own giving from the convenience of a mobile device. [Include a screen shot or Pushpay logo.]

Bulletin Announcement #2

There is a new way to give at [Parish Name] that is quick, easy, and secure! Parishioners can now give through our mobile-compatible giving page that can be accessed by scanning this QR code. With the giving platform you can make a one-time gift, set up a recurring gift, and log into your account to access your giving history. This new Giving platform will help our finance team provide a more efficient service to the parish.

ChMS launch Best Practices

Sharing about the transition from your current parish database to the ParishStaq ChMS may not be as public of a change as your Giving or Parish App transition. However, it is still something that impacts every parishioner, just in varying degrees. As you build a plan to go live with your new ChMS, there are three key questions to consider:

Who will be using the ChMS?

When will users start using the ChMS?

How will we train users in the ChMS?

Who will be using the ChMS?

As you prepare for your parish to engage with the ChMS, the first decision you should make is who will be logging in as a user on the site. Most parishes will generate logins for parish leadership and staff only. Depending on your needs, you may decide to cast a slightly wider net. Either way, one of the most important decisions for your implementation leadership core team to make is exactly which individuals you will be inviting to log in.

In order to fully use the software, be sure to train **staff, clergy, group leaders, volunteer schedulers, and process queue managers.***

*Process Queue Manager is a user that is assigned to manage a specific process in the ParishStaq software

When the individuals listed above log in and actively use the ChMS, they will support maintenance and use of an engaging ChMS site. Many parishes choose to stop here. However, there can be advantages to inviting all of your parishioners to log in, in a limited capacity. Below are some things that logged-in parishioners can do that may be beneficial at your parish. Remember that many of these things can always be done by an Admin with correct privileges, but you may find it helpful for parishioners to do it themselves.

Updating Personal Contact Information

Uploading Profile Photos

Updating Personal Privacy Settings

Selecting Personal Communication Preferences

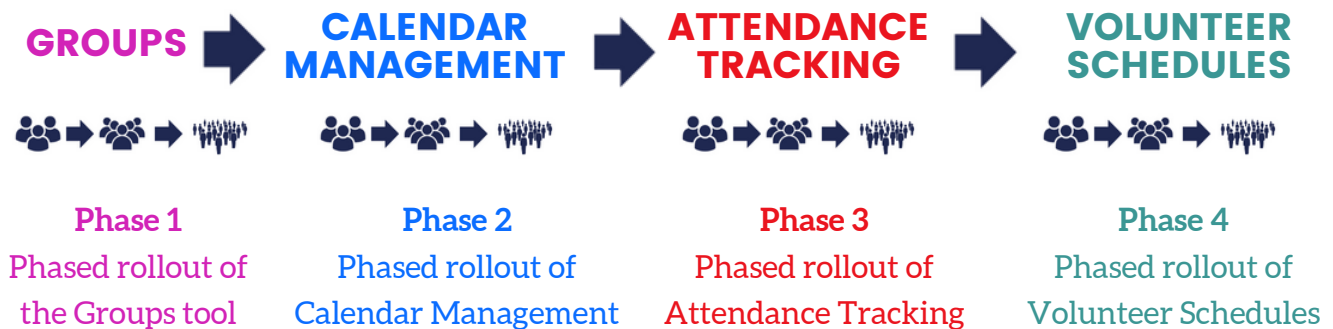
No matter whom you are inviting to log in to the software, it will be paramount that you clearly communicate your expectations and policies. For staff and key leaders, you will want to discuss in meetings as well as send email follow-ups to document these. For your parishioners, emails, Mass, and bulletin announcements will be the key. There is no harm in overcommunicating this change.

When will users start using the ChMS?

Any time you are deploying a new software tool, it is a good idea to create a clear timeline with dates assigned for multiple phases. With each feature, you should plan on testing it with your core implementation team first. Then, it is wise to have a slightly larger, trusted team serve as beta testers. Once they have effectively tested and gained familiarity, it is time to roll it out to the rest of your parish. Each of these phases does not have to be long, but they are all valuable steps, which should be repeated for each feature you roll out. An example of what this might look like is below:



Another thing to remember is that you do not have to go live with every single feature at the same time. It can be tempting to choose one single date to go live, but this is unwise. ParishStaq offers so many different tools that it is best to roll things out to the public incrementally. For example, your first step may be to create all of your Groups and get Group Leaders using the site. Then you can move onto Calendar Management, and then focus on getting Attendance Tracking up and running. As you incrementally go live with different tools, you will want to maintain your testing phases. The graphic below displays how all of this comes together for a smooth, phased rollout.



With all of this, picking your launch date(s) is critical. Here are some questions that might help you.

- When is the best season to launch something new in your parish?
- Consider your attendance patterns and plan your launch to optimize awareness and buy-in.

How will we train users in the ChMS?

Once you have decided on who will be using the ChMS and when they will begin using it, it is time to get specific about how you will train your parish for maximum software engagement. Below are some general principles for launching, but remember that your training will vary depending on who your audience is and how they will use the tool. For staff, consider a weekly "lunch and learn" format. For volunteer leaders, consider holding a specific training where they can learn the ins and outs of the software, but tailor it to their use. For parish-wide use items, consider Mass and bulletin announcements, emails, or other ways to invite them into the software. Note: general parishioners software usage will be much lighter and training beyond this may not be necessary.

Plan Your Launch (greater parish community)

This is where your team can let that creativity run! Sit down with your Launch Team and begin to plan out your presentation.

- Use your Launch Day to show your parishioners your site. Focus on this. It is not the time to train your parishioners on using the available tools.
- Create a final "Call to Action" to log in.
- Focus on remaining positive and enjoying the process!

Pro Launch Tip: Consider launching over a couple weeks. A parishioner may only attend Mass 1-2 times a month. A one-time launch introduces the software to only a portion of your parishioners.

Parish Promotional Materials

Most people need to see information 3-7 times before they understand and retain what you are saying. Consider promoting your launch via:

- Mass announcement
- Bulletin announcement
- Website announcement
- Email or text
- Social Media reminders

Social Media is a powerful tool!

- It is a great way to advertise, market, and enhance connection to your faith community.
- It gives you multiple ways in which you can communicate and convey a message.

Remember... no matter how much you communicate, the greatest endorsement is when the pastoral leadership, staff, and key community leaders are actively using the software.

Post-Launch Ideas

Process Queues: You are fully launched and are ready to track more fully the ebb and flow of your parishioners' participation with your ChMS. Here are a few examples:

1. Your Religious Education's attendance reports recognize when a child has missed a designated number of weeks in a row. This can trigger an email to Religious Education staff to reach out to the family.
2. Your giving report lets you know that a parishioner's pattern has changed. This report generates an alert so a staff member can follow-up in a personal way. Understanding the fluctuations of individual giving can give you an opportunity for ministry.

Metrics and Evaluation: Once you have completed your parish-wide launch, we recommend you gather some information. Various reports can give you valuable information as to whether or not your launch has effectively connected people to the software and their level of engagement. These numbers can also help you set a baseline for expected responses in similar campaigns.

Here are a few ideas on what you may wish to measure:

- How many people have logged in?
- How many members have uploaded a picture?
- Are people using the messaging features?
- Has your staff received requests for help with specific features?

Continuous Delivery Launch: The further you get from your parish-wide launch, the greater the information gap between those who were there vs. those who were not. This means you will need to think about how to promote the software after your launch.

Here are a couple of ideas on how to continue to keep parishioners engaged with the software:

- Include a walkthrough of the app at your new parishioner welcome event.
- Include a video on your website.
- Encourage people to log in and download their giving statement in January.
- Use Forms for registrations and evaluations.
- Send an email campaign highlighting certain features.

APP LAUNCH BEST PRACTICES

Your app will be the best way for your entire parish to engage in ParishStaq. They will be able to donate, find out about upcoming events, connect with their Groups and more, all from the palm of their hand. Since the app is key to engagement, it is essential that you strategically launch the app in a way to maximize parishioner use. There are two keys to a successful app launch: preparation and communication.

Preparation: Since the app will pull in features from both ParishStaq Giving and the ChMS, it is important to make sure that the related features in each are ready for public view and engagement before launching your app.

Communication: As with any other launch, you will need to overcommunicate the launch and include a call to action to your leadership team and your parishioners. Use all of your communication methods to keep them informed (email, social media, phone call, Mass and bulletin announcements, website, etc.)!

Preparation

- Ensure online giving is configured appropriately
 - Correct Funds visible
 - Branded for your parish
 - Custom thank you message
- Configure all ChMS Groups
 - Interaction Types
 - Public vs. Nonpublic
 - Listed vs. Unlisted
- Create app assets in the Mobile App Studio
 - Upcoming Events
 - RSS Feeds
 - General Info
- Test out the app with your internal team before launching
- Ensure you have the link to your app launch video

Communication

- Share announcement and call to action with internal test group
 - Email
 - Share in a meeting
- Share announcement and call to action with entire parish
 - Email
 - Announce at Mass over several weeks
- Make downloading easy
 - Send out direct link
 - Create QR Codes in the Mobile App Studio and add to bulletin, create flyers, display posters in the narthex, etc.
 - Add link to your parish webpage

Sample App Communication

Internal Test Email:

Hi [Staff Name],

I am eager to get you plugged in to our new parish app My Catholic Community... Scan this QR code below [or insert website link] to download our brand-new parish app on your mobile device. Please explore the app, specifically looking at the event calendar, the group features, and the giving experience. Then let me know what you think.:

- What did you think of the user experience?
- What would you improve?
- Was it easy to give?
- What other content would you like to see in the app?
- If you were not on-staff, what questions would you ask?

Once you have downloaded the app to your phone, please go to the app store and leave a review of our app for others to see. Thanks for your help with giving us this crucial feedback needed to make for a smooth launch and the best experience for our parishioners!

Blessings,

[Pastoral Leader]

Community Launch Email:

Hello [Parish Name] Family,

[Parish Name]'s mission is to help people encounter Christ, accompany one another, and live the joy of the Gospel. This is how we are able to make such a lasting impact in our surrounding community, and it is the driving force behind everything we do.

We are so excited to announce the new [Parish Name] app! We want to make sure that everyone can experience [Parish Name] whenever and wherever. Our app will change the way we connect with those visiting for the first time, and those who call [Parish Name] home. Whether it is signing up to serve at Mass, registering for upcoming events, or reading the digital bulletin, you will now be able to stay connected 24/7.

Click this link [insert link] to download our app to your phone. We will be launching our new app this weekend.

Blessings,

[Pastoral Leader]