Mind Towards MINISTRY

webinar series

Let's Talk Assimilation!

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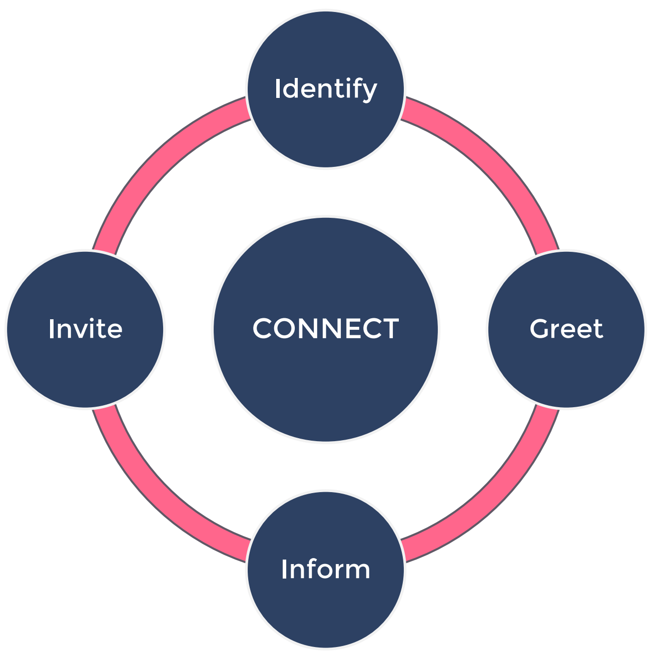
Assimilation

FellowshipOne views *Assimilation* as your process of guiding a person from their first visit to becoming a member of your church. The further along a person is on an assimilation track, the less likely they will stop attending. Why? This is because the person develops a greater affinity to the church. This affinity continues and grows into a sense of belonging to the church.

Assimilation System

The Assimilation System should provide an effective, yet efficient means for identifying, greeting, informing, inviting, and connecting each of your guests. Contemplate the following questions when creating your church's Assimilation System.

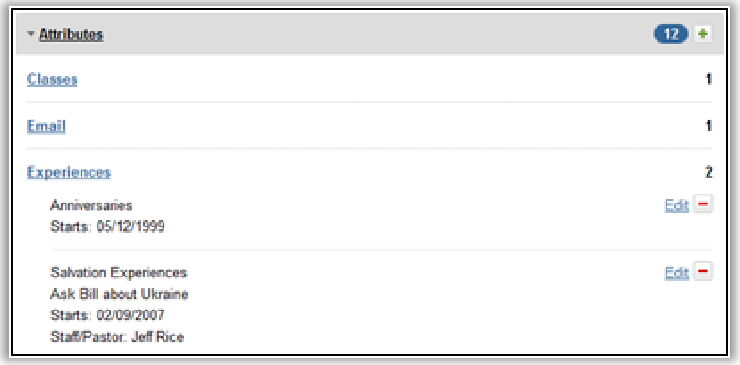
- How do you get people to keep coming back?
- How do you know if or when they are ready to take that next crucial step?
- Does a new member's assimilation come full circle, bringing them back to a point where they are engaged in evangelism?
- Are they extending invitations to their friends and associates?



Develop Your Toolbox

Before you begin using FellowshipOne to track the assimilation of your first-time guests, you must first stock your toolbox. Some preparations you need to have in place are: Attributes you want to track, Communication Card, Email/Letter Templates. These are essential elements that will be discussed before getting into the actual process.

- Attributes
    - FellowshipOne allows you to track church-specific information about individuals in Individual Attributes. Attributes can be anything you want to track about a person. Some examples are: Experiences (Baptism, Dedication, Marriage), Skills/Hobbies (Arts/Crafts, Woodworking, Computers), and so on.



    - Attributes are a benefit because they allow you to organize unrelated people by a common "bookmark" or "tag" in the form of an individual attribute that can be used to locate people later from People Query or reports.

- Communication Card or Contact Card

- The Communication Card collected from your worship service and other ministry activities is your primary source of guest information. Many churches use one or more paper forms or cards for attendees and guests to fill out to receive church information, update personal information, or request follow-up from someone at the church. With FellowshipOne, paper forms become modeled electronically, distributed to the appropriate person automatically, and actual assimilation becomes visible to all users. The information provided on these forms should be entered into FellowshipOne.

WELCOME

Please fill out this form so we can get to know you better.

Personal Information

I am new   Update my information

First Name   M   F

Last Name

Mobile ( ) -   D.O.B. MM / DD / YYYY

Email

Spouse   M   F

Mobile ( ) -   D.O.B. MM / DD / YYYY

Email

Address

City   State   Zip

Check the service that you attended.

9:00am   11:00am   5:00pm

- Communication
    - It is important to reach out to everyone who has visited and filled out some kind of communication.
    - My suggestion would be to include the following items.
        - A thank you for attending.
        - A simple next step to invite them to meet other people
        - An invitation to the next sermon in the series.
        - A thank you and personal invitation to contact you or another pastor on staff.
    - You might invite them to
        - A monthly pastors lunch
        - A volunteer project in the community.
        - Your midweek supper to meet new friends
        - Whatever you invite your first time guests to, make sure it is a simple clear step that is easy to follow.

    - No matter what your next step is, your church visitor may not know. Find ways to communicate that next step for your first time church visitors. Do not assume that they will know.

FellowshipOne Configuration

In preparation of tracking new visitors, you must set up within FellowshipOne what you plan to track. It is important to understand that many of the tools within the Portal are dependent on another tool being set up. This document assumes that your FellowshipOne portal has been configured according to Best Practices. The following sections are broken down in order of how they should be set up for effective follow-up.

Configure Attributes

Individual Attributes are a way to track people by a specific event or characteristic/trait. Creating individual attributes is a two-step process. First, create the main Attribute Group for the attribute to reside under. Next, create the attributes. For example, you could have an attribute group called “How did you hear?” You can create as many attribute groups and attributes as you need.

You may be asking, “why start with attributes?” You can optionally, select the *Individual attributes* option at the top of the contact form. The Attributes form appears. This selection allows you to associate any of your individual attributes with the contact form. Some churches like to capture data on how a person heard about the church for marketing purposes. You can create an individual attribute group called "How you heard" and individual attributes such as TV ad, Radio ad, Billboard, Friend, Newspaper, Phone book, etc. These can be associated with your contact form so you can quickly capture this information as you are entering contacts.

To Add an Attribute

1. Click Admin > People Setup > Individual Attributes. The Individual Attributes form appears. The Attribute Groups option is selected by default.
2. Type a group name for your attributes in the Attribute group name field.
3. Click Add attribute group. The group name appears in the Attribute Group Names table at the bottom of the page.
4. Click the Individual Attributes option at the top of the form. Ensure the activity group you want to work with is displayed at the top of the form. If it is not, use the Attribute group drop-down list at the bottom of the form to select the appropriate group.
5. Type the name of the attribute in the Individual attribute name field.

6. Select any of the following options (these are completely optional and do not need to be used if it does not make sense. For example, Record end date doesn't make sense on an attribute such a Baptism).
    - Record staff/pastor involved—used to record the name of the staff member or pastor involved if the attribute is an event or experience or something that requires approval.
    - Record start date—used to record the date of the attribute. Enable this if you want to record the date something happened. For example, in the attribute group "Experiences", there may be an attributed called "Dedication", which requires a date field to record when a baby was dedicated.
    - Record comment—used to provide a comment text field that allows you to type any comments about the attribute.
    - Record end date—used to record the ending date of the attribute. Enable this option if the attribute expires.
7. Click the Add individual attribute button to add the attribute. It appears in the Individual Attributes grid at the bottom of the screen.

Configure Contact Forms

Step 1: Create the Form Name

The first step in creating a contact form is to create the name of the form.

To create a form name

1. Click Admin > Contact Setup > Form Names. The Add/Edit Form Names form appears. Any existing form names appear in the grid at the bottom of the form.
2. Type the name in the Form name field.
3. Click Add new form. Your form name appears in the grid at the bottom of the form.

Step 2: Create the Contact Items

Contact Items are the individual action items on the contact form. Each item probably has a different action and some items may have more than one. For example, a "First Time Visitor" or "Guest" option on a card may trigger a welcome letter and a personal phone call. You have the freedom to enter as many items into Fellowship One as necessary to complete a request. Just because there is only one item represented on the card, does not mean there has to be only one item in Fellowship One. A "First Visit" item on your card may translate into a "First Visit Letter" and "First Visit Call" contact items in FellowshipOne.

Additionally, you may want to have the option to track some non-actionable information - such as the service time the person attended. There is no need to create service times as contact items, you will have the opportunity to associate service times with your contact forms in the final step of this procedure.

To create contact items

1. Click Admin > Contact Setup > Manage Items. The Add/Edit Contact Items form appears.
2. Type the name of the contact item in the Name field. For example, First Visit Letter.
3. Select the Type of contact from the drop-down list. The available types are:
    - Interest—a person is expressing interest in a service offered by the church. Interest items may be handled by mailing the person some information about the service.
    - Request—a person is requesting information on a service and expects to be contacted personally by the church.
    - Other—any other type of information offered by the person that does not fall into the Interest or Request categories.

Note: These types are used internally in Fellowship One for sorting and reporting purposes only.

4. Select the Ministry responsible for this contact item from the drop-down list.
5. Select the person responsible for the item in the Route to drop-down list.

Note: If you do not see the person responsible in the list, check to make sure the person has at least Read security access to the ministry you selected in the Ministry drop-down list.

6. Optionally, select the Multiple close check box. This check box indicates that the person responsible can work and close several contacts at one time. For example, if the contact item action is to mail merge or mass email the new believer packet, this contact item from multiple congregants may be performed and closed as a group.
7. Optionally, select the Disposition required on close check box. This option means the person responsible for working this contact item must choose a Disposition (or outcome) before closing the task item.

8. Click Add contact item. Your contact item appears in the grid at the bottom of the form.

If More Than One Person Is Responsible For a Single Item

In some cases you may have items that are worked by more than one person. For example, a pastoral care type contact item may need to be routed to the appropriate pastor depending upon several factors (age, gender, marital status, nature of request). It's best to assign the contact item to a single point person. This person can read the contact request notes and determine where it needs to go. A transfer option is available when working contact items.

One really great feature in the contact form setup process is that a single contact item may be reused again and again on several forms. For example, a "guest" or "first time visitor" contact item may always go to the same person no matter which event/activity generated the contact. However, what about a contact item like "Today I prayed to receive Christ"? This item may need to go to different ministers depending upon the context. For example, if a student selects this item, it may need to be routed to the youth pastor; while an adult selecting this option may need to be routed to the men's or women's pastor. If this is the case for your church, you may want to create different contact items: Prayed to accept Christ - Youth and Prayed to accept Christ - adult.

Step 3: Create the Contact Form

In the final step, you will combine the two previous steps to create your contact forms.

To create the form

1. Click Admin > Contact Setup > Build Forms. The Contact Form Builder appears. The Service option is selected.
2. Select the correct Form name from the drop-down list.
3. Optionally, associate service times with your form by selecting the correct Ministry and Activity from the drop-down lists. All scheduled dates for the selected activity appear in the box on the left side of your screen.
4. Select the first option and hold your mouse button down and drag it through the entire list. This will select all available dates. Click Add to move all selected dates to the box on the right side of the screen.

Note: Fellowship One builds schedules out 4 months into the future at any given time. Make sure you set yourself a calendar appointment as a reminder to come back into this form and add future dates. Additionally, you can clean up old dates from the box on the right side of the screen by selecting past dates and then clicking <<Remove.

5. Optionally, select the Registration option at the top of the form. This selection allows you to associate different activities with your form for quick registration. For example, if you have an option such as "Register me for the next Membership class" on your communication card, instead of creating a contact item, you can associate the membership class activity to your form. See contact form registration for more information on this option.
6. Select the Items option at the top of the form. All available contact items appear in the box on the left side of the screen.
7. Select the an item you want to associate with the selected form name and click Add. The item will move to the box on the right side of the page.
8. Use the Move up and Move down buttons to re-arrange your items to make data entry easier.
9. Optionally, select the Individual attributes option at the top of the form. The Attributes form appears. This selection allows you to associate any of your individual attributes with the contact form. Select the correct Attribute group from the drop-down list and then click on each attribute you want to apply to your form (hold down the Ctrl key to make multiple selections). Click Add to move the attribute to the box on the right side of the page.

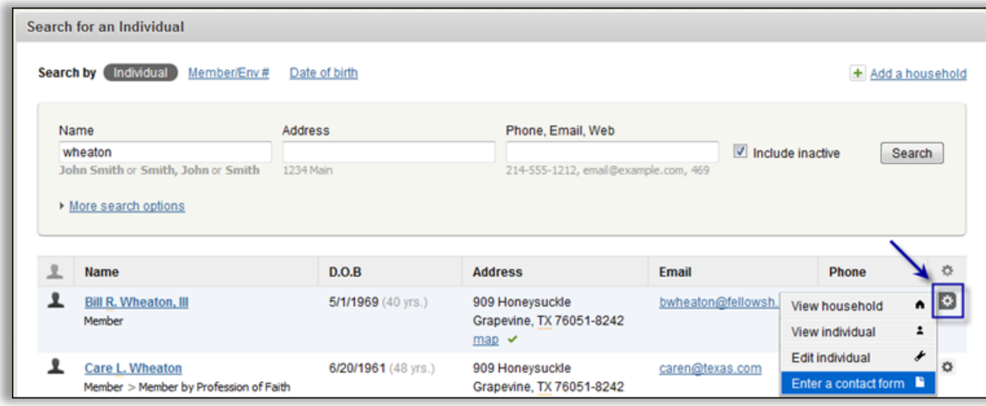
Your contact form is now complete and ready to use! Follow these steps for each paper contact form used at your church.

Contact Data Entry

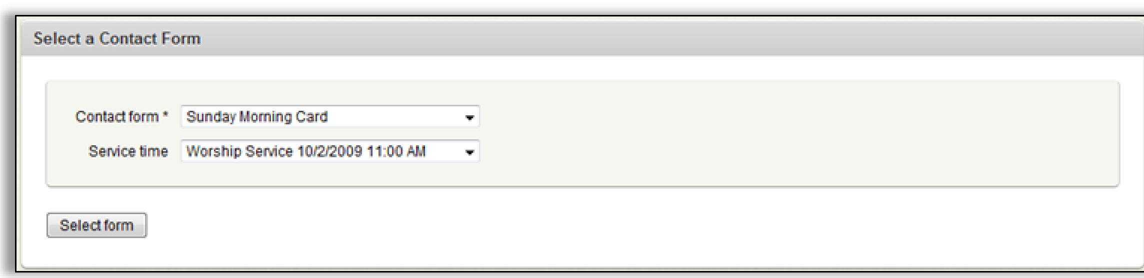
Entering a contact begins with searching. Always try searching for an individual in multiple ways - for example, by partial name and by address or phone number. Click People > Search > Find a Person to display the advanced search form. This practice prevents creating duplicate records. If the individual cannot be found, you must add a new household.

Tip! People entering contacts should have the People Edit, People Contact, Address Edit, and Communication Edit security access rights. These rights allow entering contacts and updating addresses and communication values.

If you find the individual record, or a family member of the individual, you can click the actions gear in the search results listing to enter a contact form.



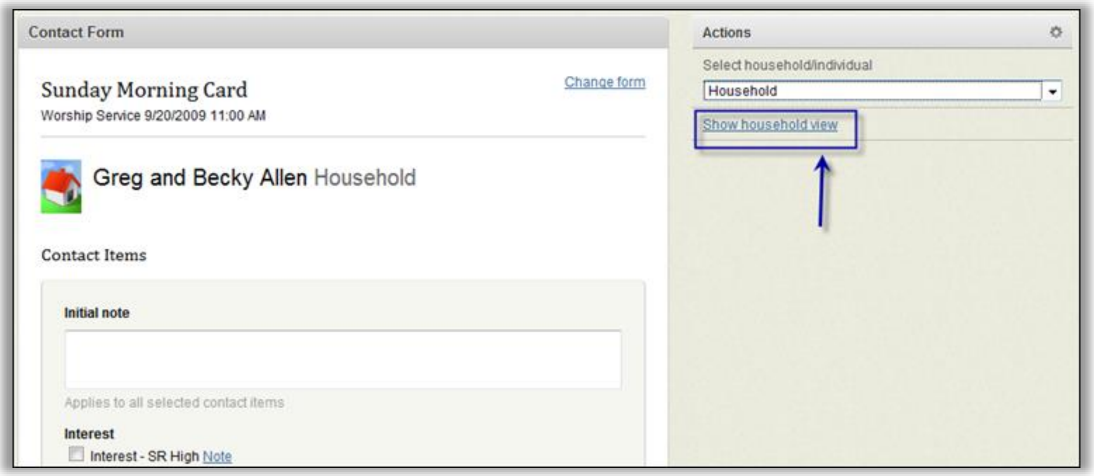
The first time you enter contacts, you will be asked to select a form (and possibly a service time). Once you have selected these options, FellowshipOne remembers your selection until you close your Internet browser. You will only see the Service time drop-down list if you have chosen to associate service times with your contact form. See Create a Contact Form for details.



If you need to change any the form selection, simply click Change Form at the top of the

form.

Next, check the address and communication values by clicking Show household view in the contact form, this takes you to the household view for the selected individual. You can see all communication and address values as well as all household members.



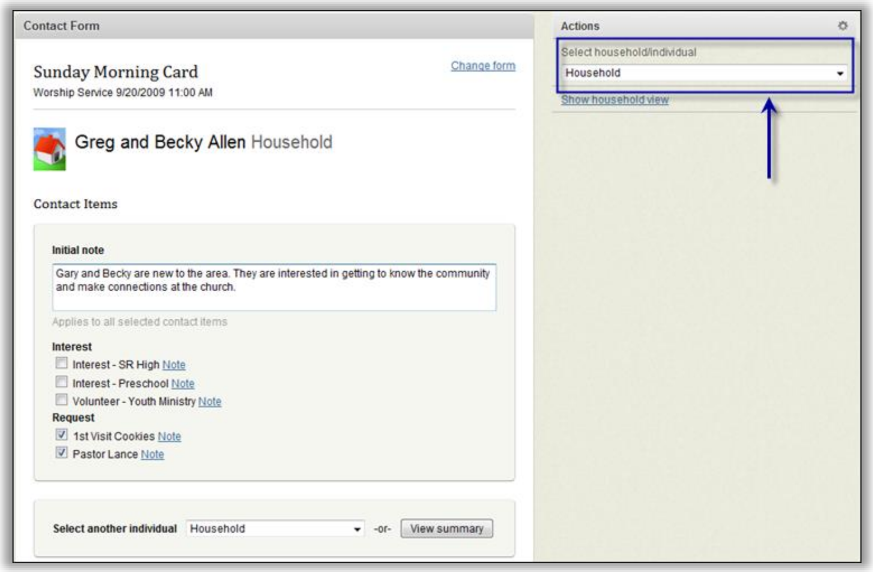
In the household view, you can also enter additional family members. Often, children will have records in the database due to Check-in for activities like Children's service. Parents are often asked to complete visitor cards. These cards are typically entered through the contact data entry process after an activity has occurred.

When you have updated the household record, click Enter a contact form in the Actions area on the right side of the household view. This will display the contact form again.

Adding a Contact to a Household or Individual

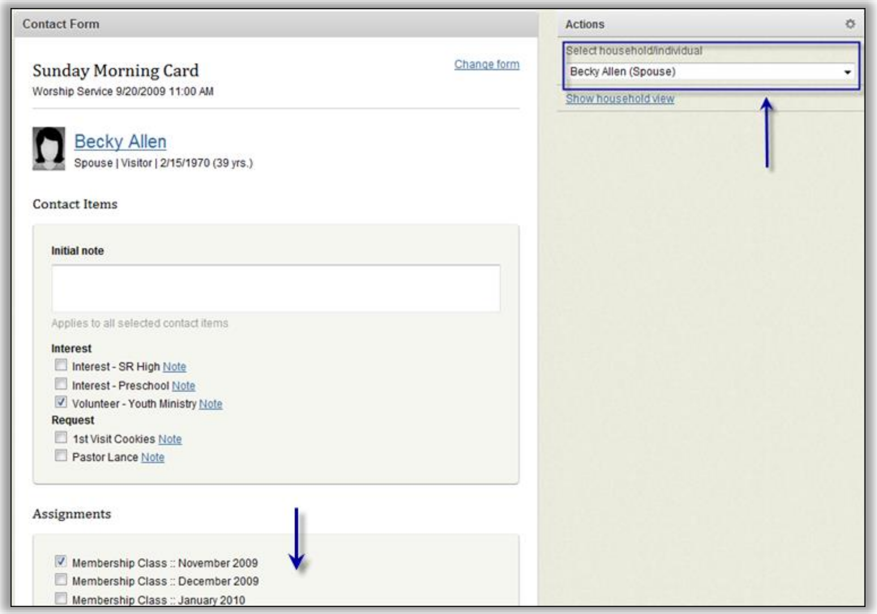
You are given the opportunity to enter contacts for either the household or the individual. Some items lend themselves to households - like first visit/guest contact items. Other items are particular to the individual - like women's, men's, or children's ministry requests. You may enter some items for the household and others for individuals in the household.

Open Household Contacts



Open Individual Contacts

Entering contacts for individuals has the benefit of also allowing assignment registrations and applying individual attributes. See Create a Contact Form for details on how to associate activity registrations and individual attributes with contact forms. These options only display when entering contacts for individuals.



Initial Note

The text entered into the Initial note field can be seen by everyone working tasks from this form. For example, if both the First Visit and Interest - Small Groups contact items are selected, both Fellowship One users responsible for these items will see the initial note when working these items.

Contact Item Notes

The Notes option beside each contact item allows you enter notes specifically for the person responsible for working the contact item. These notes will not be seen by the other people working contact items on this card. They are not private, they can be accessed by all staff that have the Ministry Read access right to the associated ministry.

Entering Contacts

The steps to enter a contact are

1. Use people search to try and locate the individual in at least two ways. If the person cannot be found, you must add a new household.
2. Check to make sure all address and communication values are up-to-date.
3. Click Enter a contact form. This option is available from the actions gear in search results or from the actions gear in the individual view or from the list of available actions in the household view.
4. Optionally, apply a service time to the contact form. This option is available if you have associated service times with your contact form. See Create a Contact Form for details.
5. Select either Household or one of the individuals in the household from the Select household/individual drop-down list on the right side of the screen.
6. Enter an Initial Note if appropriate.
7. Select each contact item that applies to the selected individual or household. Remember that you can add notes for specific contact items by clicking the Notes option beside the contact item.
8. Optionally, select another individual in the household and continue selecting contact items.
9. Click View summary and review your entry.
10. Click Save contact. Your contact is saved!

Communication

It is vital for the church to reach out to those individuals who provided some kind of contact information.

- E-mail
- Letter
- Phone Call

Aside from the information available on the contact itself, you will want to get a "360 degree view" of the person you are about to contact. This involves a review of the person's:

- Family Members, Birth dates, Address
- Contact & Note History for entire family
- Attendance History
- Volunteer Participation
- Attribute & Requirement History

Your objective is to know whatever anyone else knows about the congregant before you make contact. With this knowledge you are less likely to be caught "off guard" when communicating with the person who initiated the request. Each time a congregant talks with someone at the church, in their mind they are talking to "the church". When another staffer contacts them, people expect that staffer to know everything that was said earlier (unless it was confidential) because they represent the church. This expectation is common in today's information age.

Congregants expect everyone at the church to understand and know the previous interactions they have had with their family. That is a basic level of "care" a church staff can provide: to know what that family has revealed to the church before. The only way that can happen is to do the research in Fellowship One and discover this information. When all departments work together using the same procedures, everyone wins.

Prepare Response

Some situations will necessitate a very individual response while others may allow you use a standardized approach to your response. Gather together any information you may need to address the specific request they have made. Be ready to email any supporting information while on the phone. If a face-to-face visit will take place, prepare any materials you need to bring along. Don't make contact with people unprepared to meet the need they have.

This is also a great opportunity for you bring the power of God into the process. Take a minute and ask God to help you prepare your response and also to prepare the heart of the person who will receive your contact.

Make Contact

Contact the congregant who submitted the contact. If you plan to respond with a phone call, have paper and pencil available to jot down notes during the call. You may learn about additional opportunities to serve other family members or friends during the call. If so, think about whom else within the church should reach out to this family.

If you respond in writing, consider saving your response for future use.

Enter Notes

Enter the information you have learned into the contact notes section of the specific contact you are performing. It will automatically record your user ID and timestamp of the notes. Anyone with read permissions or better in the Ministry that "owns" the contact will be able to read your notes. If your information would be considered confidential, there is also a confidential contact notes section to enter notes. Only users with the Confidential Contact security permission will be able to see or read those notes.

If your contact method was by phone and you were unable to get through, be sure to document that a voice message was left. The status will remain In Progress while the history will list every time you attempted to reach the family if you do this.

Churches should consider developing some guidelines and/or policies for working contacts and recording contact notes. This would include things like the number of days or hours that a contact should remain open and the level of detail to record in the notes fields. It should also detail when to consider a contact as "closed".

Repeat Until Done

Contacts are given a status of Open when initially created and remain as such until a note is added to the contact history. At that point the status is changed to In Progress and remains so until it is "closed" by a portal user. Most contacts should be viewed as short term assignments or tasks that should be completed within a few days. There are some circumstances, such as long term health issues, that may require a contact to be kept In Progress for a longer time however these will be the exception rather than the rule. Churches should establish policies regarding how long a contact records should remain Open or In Progress. If several unsuccessful attempts to connect have been made, the contact should be closed.

The contact should exit this task when the staffer assigned to the contact has done all of the follow up they are going to do. After which they will either close the contact or transfer it to someone to do additional follow up.

Transfer or Close

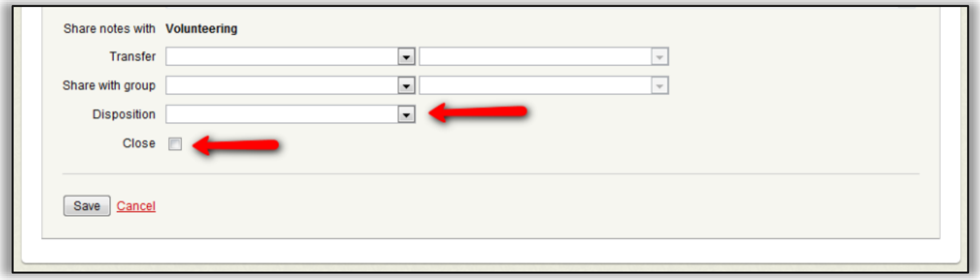
Once the assigned staffer has fulfilled their follow up responsibilities, they will either transfer the contact to another portal user or set the final disposition and close the contact.

Transfer

To transfer an individual contact, you are required to first select a Fellowship One ministry followed by a specific portal user that has Write security permissions to that ministry. If the person you want to transfer the contact to is not listed in the second select list, you will need to contact your Fellowship One Champion to get them added to the ministry or choose a different ministry that they may have write permissions to. When transferring, the contact should remain In Progress so the next person can continue to add notes to the history. The Portal should not allow you to close the contact when Transfer selections are made.

Closing

To close the contact, check the Close checkbox and click Submit. That will change the status to Closed and remove the contact from the staffer' default display list. The contact still exists for historical and reporting purposes.



To facilitate how effective follow up has been, Fellowship One offers an ability to "tag" each contact with a Disposition. A church can define multiple values for their own use in the Admin area and used when closing or updating a contact. Simply make a selection from the Disposition pull down menu. Each value represents the end result or final outcome from working the contact. Some examples might be:

Information Provided

- Joined Small Group
- Talked With Person
- Refused Services
- Attempted Contact – No Response
- Bad Contact Info
- Staff Follow Up Needed

Reporting

Each step in the Assimilation Process represents a set of tasks, to-dos or smaller processes that have been completed

Assimilation Analysis (Report Examples)

- Core Report M4010- Contact Item without Individual Attribute – who has been followed up with as a 1st time guest, but not made a specific next step for assimilation

- Core Report: A1517- The output is an 8.5 x 11 portrait Profile Summary on one or more people and/or their family. You choose what informational sections to display and which items in each section to display.

- Report M4025E- Gives a listing of contacts and information made during the contact and the church user.

- Report P6050E - Individual Information by Attribute Groups with Total Counts – allows you to gauge how many are at any given stage of the assimilation process

- Report 6021E - Individual Lacking an Attribute – identifies all who are missing the specified assimilation step.

Process Name	Assimilation - Visitor Follow-Up							
Ministry Objective (What?)	Provide Visitors multiple opportunities to identify themselves and connect with people in the Church							
Return on Ministry Benefit (Why?)	Each Visitor comes to the church with a different set of expectations and we provide multiple methods for the Visitor to connect at a pace and method that is most comfortable to him/her							
Process Owner	First Impressions Ministry Pastor							
Ministry Notes								
Task Step Number	Step 1	Step 2	Step 3	Step 4	Step 5	*Optional - Step 6*	Step 7	Step 8
Task Name	Focus on Visitors	Collect Visitor Information	Follow-Up - Send Pastor's Visitor Letter	Follow-Up - Person makes Visitor Contact 1	Follow-Up - Ministries Respond to Request for Info	*Optional - Follow-Up - Person makes additional Visitor Contacts*	Monitor Visitor Follow-Up	Reports
Information Source (Input)		Communication Card	Assigned Visitor Letter Contact Item	Assigned Visitor Call Contact Item	Assigned Ministry Info Request Contact Item	*Assigned Visitor Call 2 Contact Item*	Contact Items	Fellowship One Report Library
Task Action (What?, Where?, How?)	Provide multiple methods to make it easy for Visitors to connect such as: - Visitor Parking Signage - Guest Info Center in Lobby - Sunday Service Announcements - Bulletin Communication Card - Visitor Welcome after Service - Church website	Throught the various methods in Step 1 the Visitor's Information is Collected using a Communication Card (contact form) providing a place to identify him/her self as a Visitor and request more information about the church. The Visitor info is input into Fellowship One (F1). This begins the 360 degree view of the Visitor through the F1 People Record and Contact Manage features.	Send the Visitor Letter to those who visited last Sunday. Close this Contact Item thereby showing contact history on Visitor's F1 People Record.	Task Assignment to Call the Visitor appears on Follow-Up Person's F1 Home Page (and optional email notice is sent). The Follow-Up Person records notes from interaction with the Visitor. Once the church's definition of "completed" contact is achieved, the Follow-Up Person closes the assigned contact item providing a disposition of the outcome of the Visitor interaction.	Task Assignment to contact the visitor with requested ministry information appears on Ministry Person's F1 Home Page (and optional email notice is sent). The Ministry Person records notes from responding to the request with the Visitor. Once the church's definition of "completed" contact is achieved, the Ministry Person closes the assigned contact item providing a disposition of the outcome of the interaction.	*If the Church's Follow-Up strategy involves multiple Visitor Calls, optionally add those here. Some Churches assign multiple people to call the Visitor. Other Churches assign a time delayed Follow-Up additional call 2 weeks after initial call. In such cases, the Church creates additional Contact Items named accordingly (e.g. Visitor Contact 2 Week). The Task Action is the same as shown in Step 4.*	Church Leaders may monitor the status of Visitor Follow-Up contact items by navigating in F1 to ***Ministry › Contacts › Monitor Statistics.***	Report Library provides many reports. Three examples are provided here: - M4010 Communication Card Contact Summary Report - A1517 Communication Card Personal Profile Summary Report - M4025E Visitor Follow-Up Contact Items
Information Results (Output)	Visitor identifies himself	F1 People Record & Contact Item(s)	Letter Sent & Contact Item Closed	Follow-Up Calls Completed & Contact Item Closed in system	Request for Info Fulfilled & Contact Item Closed in system	*Follow-Up Calls Completed & Contact Item Closed in system*	Contact Item Statuses Monitored	Ministry Staff Reports
When?	Every Sunday	Mondays	Mondays	Within the week	Within the week	*Within the designated time frame*	as needed	Weekly
Task Owner (Who?)	Sunday Announcement Person & those repsonsible for the various methods	Office Assistant inputs Communication Cards into F1	Office Assistant	Assigned Follow-Up Person	Assigned Ministry Person	*Assigned Follow-Up Person*	First Impressions Ministry Pastor	Office Assistant
Task Notes		See Input Visitor Info tab below	See Work the Contact tab below	See Work the Contact tab below	See Work the Contact tab below	*See Work the Contact tab below*		See Report Code (M4010, A1517, M4025E) tabs below
Task Step Pre-requisite		Configure Communication Card (see tab below) in F1 Contact Management feature set						