THE BEGINNER’S GUIDE TO CHURCH AUTOMATION
There’s never been a more exciting time to be administering a church.

Think for a moment about all the ways that technology has completely transformed the way we minister to people in the last 20 years.

- Email, social media, and mobile applications have changed the way you communicate with your church members.
- Cloud computing has changed how you store your files and collaborate with volunteers.
- Biometrics and security software have changed the way children are cared for.
- Electronic payment processing has changed the way you collect offerings.
- Software-as-a-service has changed how you manage your member database and plan your weekend services.

Technology has made the incredible scale of churches possible. How difficult would it be to organize services, manage a database, handle finances, and communicate effectively with more than a thousand people, all without the use of modern computing? It would take a massive staff and an endless amount of hours.

Yet, all around the world, churches of multiple thousands are run and administered by a relatively small staff, largely thanks to the possibilities of technology.
But technology doesn’t always mean easy.

As much as technology has enabled the explosive growth of churches, it hasn’t always made things simpler on church staff. Updating systems, training the old guard on new technology, and managing all the hardware and software – for all the advancements we’ve made, we’re still putting in a lot of work.

The directive of the church is to “Go into all the world and make disciples of all nations.” Yet, if someone were to observe your church staff all day, they might say your directive is to update a spreadsheet, sort through emails, or manage a database.

While technology has enabled scale, ministers and staff spend too much time doing tasks that aren’t related to their core mission. These tasks are an important part of achieving your goal, but also seem like a distraction.

That’s where the next looming technology trend comes in.

Automation.

At first, you may think automation is only something for car manufacturers and high-end software designers. But even small businesses and churches are seeing how automation can help them make that next quantum leap into scaling the operations of their churches.

Automation is the next piece of the puzzle that lets us truly leverage technology without becoming a slave to it. Automation will save your church time and money, but most importantly, it will allow your team to focus on the important tasks of person-to-person ministry rather than sitting in front of a computer all day long.

This ebook will help you understand what automation is, learn how to immediately apply it to your regular church processes, and see how other churches are implementing it.
Broadly speaking, automation is the delegating of manual tasks to a computer or system.

For example, if you use a Connection Card during your weekend services, that card must be filled out, collected, and manually sorted by a human. Then a human has to enter that data into a system and pass along details to other relevant staff.

With automation, the information can be entered once electronically. Then, a system takes care of automatically collecting, sorting, uploading, and dispersing relevant data to the right people.
“But a church could never be fully automated! The work of the church is too personal.”

You are right! In the church world, most of the core ministry can only be done from one human to another.

However, in the world of automation, we use the phrase ‘The Human-Computer Symbiosis’ a lot. Now that we have such amazing technology available to us, it makes sense to let humans do what they do best and also let machines do what they do best.

**Humans are great at:**

- Perceiving needs
- Initiating new programs/ideas
- Caring for each other
- Making personal connections

**Computers are great at:**

- Processing data without any errors
- Handling scale and speed
- Providing rational analysis
In the church world, ministers and staff are often burdened with lots of manual tasks that are not at the core of what a church should provide. It makes much more sense to bring in systems that can automatically carry out some of these tasks to free up ministers and staff to focus on their essential ministry roles.

For example, let’s look at hospital visits – something that seems beyond the realm of technology, right? However, the entire process may be filled with more tasks suited for computers than you would at first think.

Of course, humans need to be the ones to actually walk in the room, talk with patients and families, and take notes if a follow-up visit is needed. These are essential tasks that can’t be delegated to a computer.

However, a system can receive a request for a visit, validate the data coming in to make sure the minister doesn’t end up at the wrong place, assign the visit based on a schedule or based on relationship with the patient, disperse notes about the visit to other staff, and schedule another visit.

Creating a great symbiosis here means leveraging your systems to handle all the routine tasks and allowing the minister to focus on the high-touch, interpersonal work, rather than wondering if he’s at the right room number.

Can you see how creating a symbiotic relationship can bring a whole new level of effectiveness to ministry? Think about these examples:

**New Member Onboarding**
Imagine joining a church, but feeling like you are getting ready for a doctor’s appointment with multiple (often duplicate) forms and phone calls to confirm your information. What if you let a system take care of all the database updates and let your staff focus on making someone feel at home and welcome?

**Funeral Service Request**
When a church member loses a loved one, a minister needs to be fully dedicated to the family. Delegate all the scheduling and notification tasks to a system.

**Communication Request**
How many hours are wasted at churches trying to figure out whether a notice about the upcoming church picnic should be mentioned from the pulpit, or just be a slide before the service? These can be quick approvals that don’t waste time that can be used elsewhere.

In so many ways, church automation is all about helping bring back the humanity to the jobs that ministers and staff perform at a church.
Chapter 2:

THE LOW-HANGING FRUIT OF AUTOMATION

Automation can take many shapes and sizes, but the easiest way to see it in action in a church is process automation.

Every church has dozens of routine processes. Processes may be highly structured and organized (like handling payroll), or they may be loose and ad hoc (like assigning specific prayer requests to staff). Some processes may be long and complex (like taking a new church member through a series of classes), while others may be very short and simple (like approving a mileage reimbursement).

A good definition of a process is anything that happens in your church that involves a **form** (or a set of data) and a **workflow** (a path for that data to follow).
Here is a quick list of typical processes in a church:

- New Member Registration
- Building Use Request
- Wedding Service Request
- Purchase Request
- Communication Approval
- Volunteer Registration
- Staff Onboarding
- Resignation & Exit Review
- Performance Appraisal
- Leave Request
- Expense Claim

In each of these situations, someone needs to provide some data in a standard format and that data has to go from person to person until it is completed.
So what does process automation mean?

Process automation means you take an individual process and figure out how to reduce the amount of manual work involved by humans. Or, in other words, trying to achieve a better Human-Computer Symbiosis — allowing humans and computers to do more of the work they are better at.

Let’s look at how this played out in a real church that was trying to automate their leave or vacation requests. In the old manual system, if Heidi wanted to schedule a week off over the summer, she would send an email to her manager, Tony (in other churches it might be a paper form to fill out). Tony would have to check the ministry calendar. If he approved, he would send it to the senior minister to look at. Then, it would go to the office manager, Kay, who kept separate paper calendars to track the number of vacation days for each of the 15 employees on staff.

Let’s say that Kay found that according to her calendars, Heidi didn’t have enough leave days remaining. She would send out another email to everyone, rejecting the claim. Then, Heidi would have to go over to Kay and point out that she had changed her dates for her previous vacation, but that didn’t reflect in Kay’s calendars.

After a lot of sleuthing through emails, Heidi would have to get Tony to forward Kay all of his records. Kay would grumble and erase her markings in Heidi’s calendar and update it with the new request. All of this would happen over about a dozen emails and perhaps a few hours of combined work.
Seems a bit excessive, doesn’t it?

Manual processes like these take a lot of work. They are slow, time-consuming, difficult to track, and prone to errors. Anyone who’s been involved in a system like this knows how it sucks the life and time out of you and prevents real ministry from happening.

This church decided to automate the leave request process. Now, Heidi can pull up an automated form to complete online. On the form, it will show her how many leave days she has in total and how many are remaining. If she doesn’t have enough days, she can’t complete the form. It can also have a link to a shared calendar so that she knows if her dates fall at a bad time.

After submitting her form, Tony gets a notification to review the form, either on his desktop or from his mobile. He can also check the calendar and quickly give an approval or send it back with a question.

After he approves, Kay gets a notification to give a final check, but she doesn’t have to check her paper calendars anymore. Heidi’s request will automatically be added to a shared Google Calendar that shows when everyone is off. At the end of the process, Heidi and the senior minister both get a quick email notification that the request has been approved.

Over a three month period, this church processed 46 leave requests. With the automated system, each person in the three-step workflow spent on average about 5 minutes looking over the request and it took an average of 12 hours to get each request approved, logged, and on the calendar.

Churches like this one that automate their processes:

- have less errors
- complete individual items in a process faster
- have more integrated systems
- can easily pull up the status of any current or completed request

Do you think it’s time you looked at automation?
Chapter 3:

FIRST STEPS TO AUTOMATION
While the benefits of automation might be very clear, it’s harder to know how to actually start it at your church. Here are a few easy steps you can follow.

**Step 1: Choose the Right Process**

Not every process in your church can or should be automated. You want to start by selecting the best process.

Processes that are good candidates for automation:

...**already have some structure**. If you have a form (electronic or paper) and a generally accepted workflow, you've got a great process for automation.

...**are a source of friction**. Start with processes that are similar to the leave request mentioned above that suck up a lot of time and are a pain to push through every time. Other areas of frustration may be miscommunication, accountability, or impossible tracking.

...**have some metrics that can be collected**. While the feel-good factor of automation is great, you’ll want some clear metrics on how automation improves things. This might be processing time, number of errors, or cost.
Step 2: Create the Ideal Form and Workflow

Using just pen and paper, map out the ideal flow for your process. Who needs to be involved? What data do they need?

At this point, don’t be limited by asking “Is it possible?” For example, you may be so used to a manual world that you wouldn’t imagine that at the end of a Wedding Service Request your systems could be integrated to automatically update your member database with new names and addresses for the newlyweds.

The key focus at this point is to bring in all the important shareholders and ask them what they really need to do their work well.

Step 3: Find a Process Automation Platform

There are several options to choose from, but now that you know what you want from an automated system, you can quickly weed out software that doesn’t have the features you need. You can compare the pricing plans for each option as well as other technical details like on-premise vs. cloud, how much programming you’ll have to do, if there’s native mobile support, reporting, and integration options. (We hope you’ll have a look at Kissflow to start!)

Step 4: Create Your Form and Workflow

Use your new platform to simulate your automated processes. If everything looks good, test it live with a few users, gather data and improve the process as it goes.
Chapter 4:

COMMON QUESTIONS

At this point you are probably feeling both excited and skeptical about the possibilities of automation for your church. There are a lot of potential benefits, but will it actually work for you?

Here are some common questions churches raise before jumping into automation.
Isn’t something like this pretty expensive?

You can spend as much as you want on automation. There are some very expensive enterprise options out there, but you don’t need to start with them. Some platforms offer a monthly rate per user, or a monthly rate per process to help you control your costs. Automation platforms for a small team of 10 can start at less than $100 per month, while even churches wanting to fully embrace automation should be able to spend less than a thousand dollars a month. Compared to the manual cost of performing these tasks, the advantages are obvious.

You could also build an automated system yourself using Google Apps Script or Microsoft SharePoint, but you will need to have someone on staff who has a lot of programming knowledge to create and maintain it.

Do we really need yet another software platform?

Aside from your general productivity suite, you likely have a member database, service planning software, and perhaps an entirely different system for your teen or children’s ministry. Why load your team (and your budget) down with yet another application?

The brilliant thing about a cloud-based automation platform is that it can connect all of your systems together around the way you use them. If your existing systems have open APIs or Zapier endpoints (even easier!), you can set up automatic data transfers so that each of your systems is more effective.

You already use a workflow to connect these systems, it is just a very manual one that requires a lot of data transfer by humans. With an automated system, you can get more value from the software you already use.
We aren’t a really technical church yet. Can we still use this?

This all depends on the automation platform you choose. Some options require the process designer to know a lot of coding and programming notation. However, there are also several ‘human-centric’ options out there that are much easier to use. The person who sets up the processes at your church doesn’t need to be a programmer – just proficient with most standard web-based tools. You can design workflows and forms in the way that makes sense to you without the need for any coding or technical work. If anything gets too complex, our support team is available on instant chat.

But what about the rest of your staff? If you have a lot of ‘digital immigrants’ who are still new to a lot of the technology you use, it is important to make sure your automation software is easy to use. For most users, there is nothing more complex than filling out a form or clicking an ‘Approve’ button. A good automation platform will automatically handle all notifications and will also allow you to chat about individual items.

Automation tends to be easier for digital non-natives, because it just makes sense. It also requires each team member to only be responsible for their tasks and they don’t need to worry about sending emails to the right person or making sure they change the filename of a spreadsheet.

Should I be concerned about maintenance and security?

If you choose a reputable cloud-based solution, your data is most likely safer than if you tried to keep it close by and guard it with your own servers. A quality vendor will take care of all the necessary maintenance, provide regular updates and improvements, and keep the bad guys out of your account. You can ask where they host the data and what security systems they depend on.
Questions Answered?

Automation can be a big step for some churches, but these questions shouldn't stop you from experimenting with automation. Once you try it, you will realize how much automation can augment your existing business practices at a price that easily pays for itself.

Try automation today and see how to use the next great technology trend at your church!
About KiSSFLOW for Churches

KiSSFLOW for Churches is a workflow automation platform with ready-made automated processes prepared specifically for churches. KiSSFLOW is easy to use, accessible from the cloud, and priced right to allow a church of any size to take advantage of automation. Learn more at https://kissflow.com/church/.