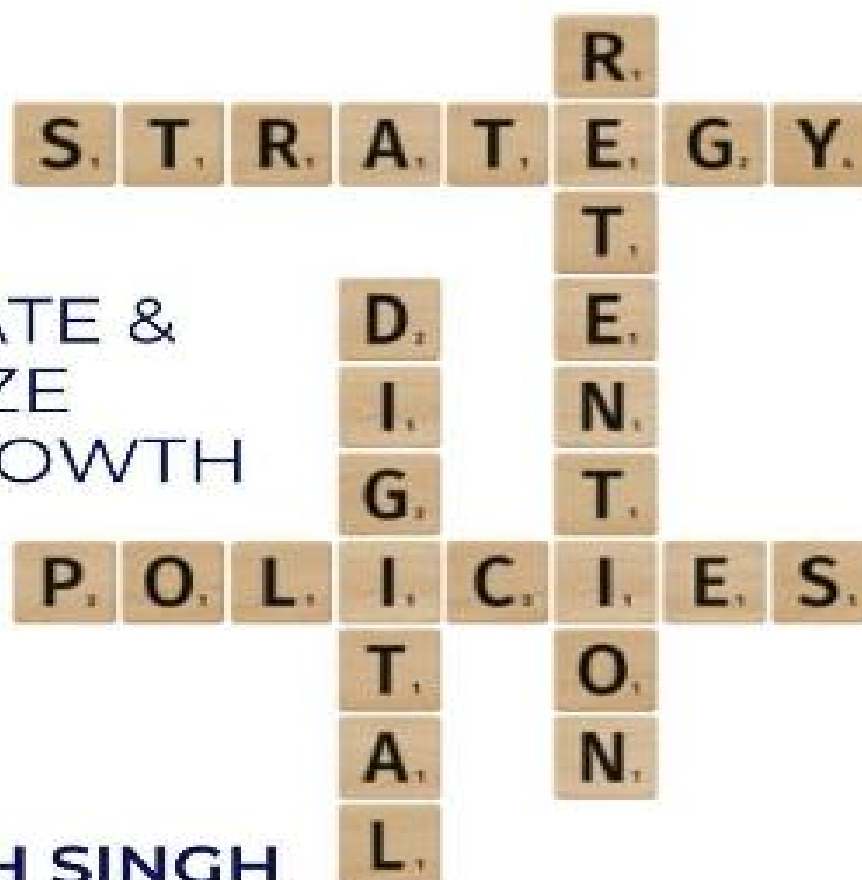


CHURCH LEADERSHIP 4.0

PLAN,
INNOVATE &
OPTIMIZE
FOR GROWTH



AMITABH SINGH

Church Leadership 4.0

PLAN, INNOVATE & OPTIMIZE
FOR GROWTH

AMITABH SINGH



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I dedicate this book to
all the volunteers at
Mukti Volunteer Village
(www.muktivillage.ca),
a Canadian charity,
dedicated to helping children
with little or no access to education.
I enjoy volunteering with you.

I also dedicate this book to
elders, pastors, and the staff of
PORTICO Community Church
in the Greater Toronto Area of Canada.

You are awesome.
I cherish the diversity,
spirit of service,
and the skillset
that we collectively offer.
How humbled I am that God has
chosen to use us in these last days.

I finally dedicate this book to all the Executive Pastors
and administrative team members who work
diligently behind the scenes, day in and day out.
It is a real honor for me to offer free resources
and affordable solutions to you
as we serve the capital C – The Church.
May this book be a blessing to you.

CONTENTS

[Foreword](#)

[Introduction: What Every Leader Must Consider \(Before It's Too Late\)](#)

[Leadership Mindset, Skillset, and Toolset](#)

[Fixed Mindset](#)

[Different Pain Points](#)

[The Four-Car Model: Optimize and Automate](#)

[Leadership Mindset](#)

[Skillset](#)

[Toolset](#)

[Church 4.0: The New Normal of Leadership](#)

[Church 4.0](#)

[Marketing 4.0](#)

[Admin 4.0](#)

[Senior Pastor & Executive Pastor in Church 4.0](#)

[Senior Pastor](#)

[Executive Pastor](#)

[First 90 Days: Discovering the Church Culture](#)

[Church Culture:](#)

[Initial Discovery:](#)

[MoSCoW Technique for Prioritization:](#)

[The Ranking Method:](#)

[The Balanced Scorecard:](#)

[The Dash: One to Ten](#)

[1. Church Governance 1-2-3](#)

[One: Governance](#)

[Two: Matters for Church Board](#)

Three: Board Recruitment & Development

2. Finance & Budget 1-2-3

One: Church Finance Policies

Two: Church Budget

Three: Church Compensation Strategy & Church Roles

3. Human Resources 1-2-3

One: F.R.I.E.N.D.S. Skillset

Two: Jigsaw Developmental Model

Three: Human Resource & Safeguarding Policy.

4. Church Policy 1-2-3

One: Church Policy – Facilities

Two: Church Policy – Marketing

Three: Church Policy – Information Technology (I.T.) and others

5. Risk Management 1-2-3

One: Risk Appetite: Removing, Decreasing, Accepting & Managing

Two: Removing Blind Spots – Risk Assessments

Three: Risk Scoring & Compliance

6. Emergency Preparedness 1-2-3

One: Fire & Medical Emergencies

Two: Lockdown

Three: Temporary Leadership

7. Document Retention 1-2-3

One: Document Retention Policy & Procedures

Two: Naming Convention & Purging Approvals

Three: Personal Data

8. Church Relationship Management (CRM) 1-2-3

One: Traditional CRM to Social Church Relationship Management (CRM)

Two: CRM Mindset

Three: CRM Checklist

9. iChurch Online 1-2-3

[One: Is Internet Church \(iChurch\) Really A Church?](#)

[Two: Platforms for iChurch Online](#)

[Three: Moving Measuring from ABC to DEF](#)

[10. Growth Strategy 1-2-3](#)

[One: Google Ads Grants & Search Engine Marketing.\(SEM\)](#)

[Two: Reviews and Online Directory.](#)

[Three: Engagement for Retention or Multiplication](#)

[Last 90 Days As An Executive Leader](#)

[Put Your Ego Aside – You Are Here To Serve](#)

[The M.A.I.N. Thing – Next Step is Self Assessment](#)

[Self Assessment of Your Church Ecosystem:](#)

[How To Get More From This Book](#)

[Glossary of Terms:](#)

[Acknowledgments](#)

[Disclaimer:](#)

[End Notes](#)

[Ask Amitabh: Organizing for Growth and Optimization](#)

[Also By The Author](#) [Available at askamitabh.online/books](http://askamitabh.online/books)

[The Innovation Gap Course](#)

FOREWORD

In reading Amitabh Singh's book, I was immediately reminded of a statement made years ago by the American futurist and philosopher, Alvin Toffler, who stated, "The illiterate of the 21st Century will not be those who cannot read and write, but those who cannot learn, unlearn and relearn." Needless to say, organizations, including the church, are experiencing significant change today. Perhaps a distinguishing factor of the present compared to periods of change in the past, is the pace with which we are observing the change occur. The rate of change alone has the potential of leaving some feeling disoriented and confused. Do you remember the playground merry-go-round when someone cranked up the speed? It is in this context, that Amitabh's book provides much needed clarity, wisdom, and hope. Yes, change is inevitable, but it need not be overwhelming and debilitating.

While it is not a stated objective, one of the serendipitous values of this book is the importance placed on the various dimensions of expertise required to see organizations not only flourish in the short-term but be sustained in the long-term. In the church, we identify these as spiritual gifts and note that Scripture encourages the exercise of all gifts to ensure viability and sustainability. Using the metaphor of the body, the Apostle Paul stated, "eye cannot say to the hand, I do not need you." One of these necessary gifts is the gift (or gifts) of administration. 1 Cor 12:28. In my nearly 50 years of first-hand experience in business and church leadership, I have witnessed on numerous occasions the unfortunate practice of pedestalizing certain gifts above others and have watched the predicable calamitous results. Organizationally, two essential gifts are required. Leadership and administration. Leadership sets the course. Administration gets you there. Administration is a necessary complement to the gift of leadership to ensure the vision and mission of the organization are accomplished effectively. Both must function effectively for the organization or church to thrive. Unfortunately, I have observed ministries

where the gift of administration has said to the gift of leadership, “I do not need you.” In time, that ministry becomes mired in bureaucracy and details, and the vision is lost. On the other hand, and equally unfortunate, I have witnessed the gift of leadership say to the gift of administration, “I do not need you.” Consequently, ministries have been led to the financial precipice resulting in financial and relational casualty. Without actually stating it, Amitabh Singh outlines why the gift of administration is so essential to a charity or local church. Diminish or dismiss it to your peril.

Yet, at the same time, he honours and recognizes the importance of the gift of leadership. Amitabh captures the necessary synergy between these two gifts like few others.

While the title of the book is Church Leadership 4.0, there are numerous leadership and organizational insights and transferable principles to provide significant value to administrative leadership in any not-for-profit ministry, business, education, and government. And, as an added bonus, Amitabh writes not as a philosophical idealist but as a seasoned veteran. His idea has been shaped on the anvil of real experience and proven trustworthy in actual organizational life.

David E. Hazzard*

General Secretary-Treasurer
PAOC, Canada

**Rev. David Hazzard met his Lord and Savior face to face on May 27, 2021. As a member of the PAOC Audit Committee, it was my honor to serve alongside David. I will personally miss him.*

INTRODUCTION: WHAT EVERY LEADER MUST CONSIDER (BEFORE IT'S TOO LATE)

I have been living in Mississauga, a city west of Toronto, since 2011. In 2003, my journey to the USA transitioned me from Executive Director of a hospital in India to serve as Director of Finance of a USA 501c3 operating in 19 countries. Much of my work life has been non-profit management, consultancy, teaching, fundraising, human resource, healthcare, marketing, process improvement, automation, and CRM.

In 2004, Jaico Publishers in India released my book *“What Employers Want But Business Schools Don’t Teach.”* John Maxwell, author and management expert, wrote the foreword of the book in which he said:

“The words you’ll read are the words of a wise mentor. They are words you may not have heard from your professor. Take them to heart. Apply them to your life.”

Yet, Yasmin D’Souza, my co-author, and I were only half right. We were not wise enough to envision the pace of change. Learning at a school or university is a good exercise. However, it is no longer enough to equip us with all the expertise needed to provide executive leadership.

If it were not for my Dad, I would be in serious trouble today. When Dad was 50, he was diagnosed with liver cirrhosis. The doctor’s prognosis put a lid on his dreams. They told him that he was dying.

“How long do I have to live?”

Dr. Biswas gently explained that it could be five, ten, or a maximum of fifteen years. Dad was a smoker. The doctor encouraged him to stop smoking.

George Bernard Shaw had said:

“Progress is impossible without change, and those who cannot change their mind cannot change anything.”

Dad changed his lifestyle and quit smoking. He modified the way he ran his lock business. I watched how he wrapped up open-ended issues. As I observed him on his last lap, I made a silent resolution. I decided then that I would change my life when I am nearing my 50s. On my 48th birthday, while serving as an Executive Pastor in Canada, I remembered this resolution.

Here is what I thought:

“It doesn’t matter how you have run the hospital in India or worked as a management consultant. Neither does it matter that you have hosted over three hundred television programs. It matters little what you did as Director of Finance in the United States. You traveled for more than 200 days each year for over five years and served as head of North American charities. It doesn’t matter, Amitabh, what you did in the past. You are dying if you won’t change!”

I decided to press the reset button in 2015. I asked myself this one question:

“If I was graduating from university today, how would I choose to run my business or a charity or a church?”

This one question, inspired by what I had learned from my father, took me on a beautiful journey. After hundreds of hours of research, studies, brainstorming with experts, and getting my hands dirty in the workplace, I relearned how to organize for growth. In those years, I deep dived four areas of church administration:

- How do we increase revenue?
- How do we increase attendance?
- How do we decrease cost?
- How do we pursue excellence?

I ended up rewriting my mission statement and hung it on the wall. It reads:

“To help you achieve inspirational goals so that we can pursue excellence and change lives.”

I am part of a denomination in Canada where 68% of our churches have less than 100 people in attendance. This book is for you who wonder how change is possible within your limited budget or human resources constraints. I want to help you overcome obstacles that hinder you from growing and achieving the goals that inspire you and change lives.

This book has not been written for Fortune 500 company leaders with bigger budgets and a larger pool of available resources. The content of this book is relevant for churches, charities, and small businesses.

Change is inevitable. Learning to grow during change is a choice. I will help you take advantage of both.

Some are living in denial that they need to change. If you are tired of the status quo or afraid of the future, I have a few things to share with you. Here is what every leader should know before it's too late. In a nutshell, by the time you reach the end of this book, it will all rest on one word that can take both of us forward.

Change!

LEADERSHIP MINDSET, SKILLSET, AND TOOLSET

*“We shape our buildings, and then they shape us.”
- Winston Churchill.*

In 2020-21, COVID-19 was the single biggest blessing in disguise of our time. It woke us up to the possibility of accepting change and the reality of the need to change. In Europe, God’s temple became museums where tourists replaced worshippers. Admission fees are collected instead of alms. Alter ropes cordon off the fragile and not the sacred. Our location-based churches (Church 1.0) were in danger of becoming empty buildings like European cathedrals, evoking the absence of God.

Fixed Mindset

Carol Dweck, an American psychologist, and Professor of Psychology at Stanford University, is known for her fixed mindset psychological trait. Carol explains “fixed mindset” as when you believe improvement cannot happen so that you won’t try. You create a self-fulfilling prophecy. Carol suggests not accepting your current status and adopting a “growth mindset.”

Romans 12:2 NLT puts it another way:

“...let God transform you into a new person by changing the way you think. Then you will learn to know God’s will for you, which is good and pleasing and perfect.”

I like to read the book of Acts to understand the ecclesia. New Testament identifies the church in three different ways. Locally as the church that meets in a house. Regionally as the church in Galatia. Most broadly, as being universal because Jesus died for the church. The purpose of us as church leaders is to bear witness to the gospel. Our church marketing centers around the mission of the church. We are to make disciples of Jesus

Christ for the transformation of the world. It is essential to our leadership mindset.

Different Pain Points

Churches that are growing cannot afford to be in a maintenance mode. Church teams need to be agile and resilient as we pull in the same direction. The entire team needs to embrace a new way of working.

The administrative team faces different pain points that are dependent on the size of your church. There is no exact science to determine a specific attendance number for a growth phase. I share five growth phases that a church may encounter.



Growth Phases	Characteristics	Size of the Church
Start-up Phase	Highly relational, led by a Pastor or two.	0 to 200 people
Ramp-up Phase	Program driven church, led by Pastor and staff.	300 to 800 people
Maturity Phase	Strength of the organizational structure, led by Pastors and teams.	900 to 1500 people
Expansion	Traditional to Social CRM, led by Pastors, staff,	2,000 plus people (Canada) /

Phase	teams, and supported by technology.	3,000 plus people (USA)
Mega-churches	They are organized differently based on size, structure, and multi-campus requirements.	Over 100 staff members

A church in the Maturity Phase or the Expansion Phase is not a larger version of the Start-up Phase or the Ramp-up Phase. They are different, with an entirely different set of challenges.

With 0-200 in attendance during the Start-up Phase, the church has one or two strong leaders. The Pastor is a preacher, counselor, facilities director, recruiter, administrator, and even a janitor.

Based on the size of a church, the church leadership will have to determine if they need an Administrator/Executive Pastor.

The pain point in the ministry listed below is how a few North American Senior Pastors shared about these phases.

Phase	Pain Point Scenario
Start-up Phase (0 to 200)	It depends on the ability of 1-2 strong leader(s): • In the early part of the Start-up phase, there is enough to pay a Pastor, know everyone in the congregation, and sustain a small program. • In the latter part of the Start-up phase, the church can sustain two staff members, know everyone in the church, and have enough finances to do pastoral care well, and run more dynamic gatherings. • The Pastor may have aspirations to grow beyond 200 attendees.
Ramp-up Phase (300 to 800)	It depends on the strength of the team: • In the early part of the Ramp-up phase, the organization increasingly becomes complex. • Staffing issues now dominate the leader's time. • Old paradigms like care ministries demand a lot of pastoral input. • The Pastor, part-time and full-time staff, volunteers begin to experience pain. • In the latter part of the Ramp-up phase, the church Administrator tries to structure the church differently. The church may lack the energy and

	vision to move beyond this phase.
Maturity Phase (900 to 1500)	Depends on the strength of the organizational structure: • Senior Pastor, Executive Pastor, full-time staff, structured by department, and backed by volunteers. • The church may still be using the same system they used to break into the Ramp-up phase. • It becomes difficult to shed the old systems, structures, and ways of doing ministries to move into the maturity phase. • It becomes increasingly more challenging to maintain a church family feel. • Leadership may avoid multiple gatherings because they already feel taxed enough with existing ones. • It may be necessary to simplify processes, decrease the number of programs while focusing on spiritual formation and small groups. • Developing volunteers becomes an integral part of strategy alignment discussion.
Expansion Phase (2000/3000 plus)	It depends on the ability of the leader, team, and organization to adapt and innovate: • Senior Pastor, Teaching Pastor/Senior Associate Pastor, Executive Pastor, Directors of Departments, full-time staff, consultants, and volunteers in place. • The size of the building and parking lot become part of the discussion. The church may need to carry out a construction project. • Not everyone is interested in moving to an expansion phase.
Mega-churches (Over 100 staff)	Mega-churches may have to organize themselves differently. • The role of an Executive Pastor may look different in mega-churches.

There is no “one-size-fits-all” guide available to leaders. We understand that some strategies work best for small DIY (Do-It-Yourself) churches.

Others may work better for larger churches. Irrespective of the size and budget of your church, three areas must be in alignment:

- Front-end guest experience.
- Back-end systems and automation.
- Church Relationship Management (CRM) builds a connected ecosystem for optimization.

The Four-Car Model: Optimize and Automate

The 4-Car model is a way to share with leaders the difference in toolsets used for optimization and automation. All toolsets are not equal. Using the wrong car will still move you towards your destination, but a frictionless experience is what will get compromised. When your team is carrying out manual tasks and live reports and dashboards are missing, it's a clear sign that a new toolset is required.

Your church is in one of these four metaphorical levels:



The 4-Car Church Model:

Level 1: Sedan – Standardization

- The church is Pastoral-based, with Pastors, Elders/Deacons, and volunteers to manage the workload.
- Many of the processes are manual.
- The need is to get things standardized so that it becomes easier to manage.

Level 2: Minivan – Optimization

- The church is Platform-based but using low-end traditional Customer Relationship Management (CRM).
- Platforms like Planning Center, ACS Technologies, Church Community Builder, Shelby, or Rock RMS are popular. These platforms are not at the cutting edge of automation and artificial intelligence (AI). Data integration across platforms is weak.
- Processes are not entirely manual, and internal processes are fragmented.
- Reports for Pastors are manually put together. Live dashboards and real-time data are missing.
- What you regard as “CRM” is not a system of records. Digital platforms have created data silos and you cannot share them across systems and departments.
- Everyone is responsible, but no one is responsible. You are thinking, *“How do I make the process better, increase revenue, decrease cost, and manage risk better?”* It is clear to you as a leader that what got you to this point will not take you any further.

Level 3: Hybrid Car – Automation

- The church is using a marketing platform, but your data lives in silos.
- Traditional communication channels like phones, emails, and surveys are still dominant.
- Social channels, document scanning (O.C.R.), and Learning Management System (LMS) do not integrate with your CRM.

- You are beginning to experience the pain of many-to-many communication due to an increase in the social media and messaging channels.
- You are better at posting your content than listening to the silent and anonymous digital lurkers.
- Automation is creating the need to restructure human resources. A team-based approach is needed. Automation is changing how the church manages events, volunteers, information technology, front desk/reception, training, finance, donations, facilities, human resources, reporting, and marketing.
- Everyone knows things need to change. There is a lack of understanding when it comes to what is required.
- Both the skillsets and toolsets need attention.

Level 4: Electric Car – Innovation

- Innovation leads the church to move from traditional to social Customer Relationship Platform (CRM) as you manage “*return on relationship*” (ROR).
- Many-to-many communication is thriving while people are on 20 plus channel networks, 10 plus messaging channels, and chatbots. Anonymous online lurkers are part of your CRM.
- You can view legally available unstructured data like videos, photos, and in 90 languages. You can receive structured insights. You have a 360-degree view from multiple touchpoints, and learning is in real-time.
- Multi-faceted platforms are all part of a connected ecosystem.
- Automation has eliminated the manual process and data entry.
- Back-end functions and visitor follow-up are fully automated.
- Cross-platform integration has removed the digital culture of data living in silos and manual data tracking.
- Artificial Intelligence (A.I.) provides insights into a visitor’s patterns, attendance routines, and details that help you serve your visitors where they are.

- Your marketing and backend office processes are not fragmented. You can listen and learn in real-time. You are at the cutting edge of automation, A.I., document retention (O.C.R.), e-signatures, pre-filled forms, learning management systems (LMS), voice-enabled workflows, and digital marketing.
- The live dashboard with critical insights is readily available to the Senior Pastor.

Leadership Mindset

Everything grows or stagnates based on a leadership mindset.

Let me present the leadership challenge in terms of mountain climbing. Before a church team plans to climb a summit, they need to be clear about the vision. Leaders need to identify the mountain their team is trying to climb.

- Mount Everest is the highest peak in Asia.
- McKinley or Denali is the highest peak in North America.
- Mount Elbrus is the highest peak in Europe.
- Mount Vinson is the highest peak in Antarctica.
- Aconcagua is the highest peak in South America.
- Mount Kilimanjaro is the highest peak in Africa.
- Mount Kosciuszko is the highest peak in Australia.

Kosciuszko is the easiest to climb in all aspects. Kilimanjaro is the next easiest to climb. Elbrus, Mount Vinson, and Aconcagua are similar in terms of overall difficulty. Denali (6,190 meters) and Everest (8,848 meters) are both challenging mountains. Everest is the hardest to climb since it's the highest and technically more complex than any other mountain. Denali is the second hardest in terms of the overall problem.

They are all mountains, but they come with different levels of challenges. The summit defines the roadmap and helps the team prepare for the challenges. Leadership mindset, in the church context, enables us to determine the path to automation and optimization. A leadership mindset helps us to understand our shared goals.

We all want to experience the joy of climbing the summit. We, at times, fail to realize that the desire to climb any summit requires preparation. Ben Webster had planned the 2004 Mount Everest expedition for two years before he attempted to climb it.¹ Ben raised half a million dollars to have someone reach the top of Mount Everest. He arranged for six tonnes of equipment, 3,000 pounds of food, 100 bottles of oxygen, 16,000 liters of fuel, and 1,500 meters of rope. Ben arranged for Nepalese park permits, yak caravans, lanterns, radio systems, planning for how and when to climb.

When a leader says, we are going for Mount Everest, the executive leadership should think of the administrative vision behind this mindset. If we climb Everest, the central support at the Base Camp needs 30 people. There are camp staffers, porters, runners, cooks, doctors, communication experts, and the Sherpa climbers. If the aim is to climb Mount Everest, we need to hire 16 of the best Sherpas, a member of a Himalayan people renowned for their skill in mountaineering. If the vision is to climb Kilimanjaro, these resources aren't needed.

The roadmap to the summit is determined based on the mountain we are trying to climb. You will probably take the "normal route" to the top of Aconcagua and the "West Buttress" to the top of Denali. To climb Everest, you will probably take the "South Col Route" used successfully by Sherpa Tenzing Norgay and New Zealander Edmund Hillary on their first summit in 1953.

For executive leadership, understanding the leadership mindset is critical. According to the Himalayan Database, which maintains records of climbs, 5,789 people have reached Everest summit 10,184 times. Mount Everest is not kind. Since 1924, at least 311 people have died on both the Nepal and China side of the mountains. Some of them are buried in a deep crevasse. Over 100 climbers have died attempting to climb Denali.

Reaching a goal is not something that comes to us on a silver platter. There is a cost for any climb. For an individual climber, climbing Aconcagua costs \$3,500. Climbing Denali costs \$8,000. Everest costs \$42,000 per person. It takes half a million dollars to organize an expedition to Mount Everest.

Four possible areas of improvement should be part of a leadership mindset as we consider what summit to climb.

1. How can I offer a better experience?
2. How can I increase revenue or attendance?
3. How can I decrease costs?
4. How can I manage risks better?

In the long run, everything rises and falls on the leadership mindset. You and your leadership team needs to embrace an automation mindset.

Skillset

“None of us is as important as all of us.” - Ray Kroc, founder of McDonald's.

The industrial age was the beginning of bureaucratic organization. The term “organizational chart” was first used in the early twentieth century. George Holt Henshaw drew the first chart created by the Scottish-American engineer Daniel McCallum (1815-1878). Organizations are not operating the way we have laid it out in a traditional organizational chart. Technological advancement overthrew the factory and productivity system. The organizational chart is static and not agile. Automation, A.I., and collaboration tools have replaced time and motion studies.

Church administrators have historically organized a church in a hierarchy. Church leaders are at the top, and everyone else is placed lower down the food chain. This hierarchy of accountability is becoming increasingly outdated. Management is now getting decentralized as we work in teams. Each team member is an expert in their area. The Jigsaw model is disrupting the traditional top-down management system that we follow in most churches.

Collaboration tools create improved real-time communication and feedback that is eliminating bureaucracy and red tape. Effective teams do not need to go through multiple levels to get the idea to the key person making the decision. Five generations of people working in our workplace are making team members communicate on a peer-based level. Multi-generational teams will push us to embrace a different team structure.

In 1 Corinthians 12:12 (NLT), Apostle Paul uses the body as a metaphor:

“The human body has many parts, but the many parts make up one whole body. So it is with the body of Christ.”

One way you can structure your administrative team effectively is to pivot away from one person having a single function as their sole responsibility, with limited knowledge of anyone else’s role on the team. It is necessary to train other team members to jump in as needed as their secondary responsibility for any team member. Succession planning for each critical role eases the transition and avoids gaps in workflows when team members are on vacation, on sick leave, resign or retire.

With the rapid technology change, the skillset in the church will confront critical projects that require accelerated learning. We will find ourselves working in interconnected teams. Organizational charts separate different employees and do not show us how teams are working on various projects. Organizational charts are ineffective when they tend to lose sight of the overarching goal of marketing penetration.

Toolset

You may have heard this quote:

“If your only tool is a hammer, then every problem looks like a nail.”

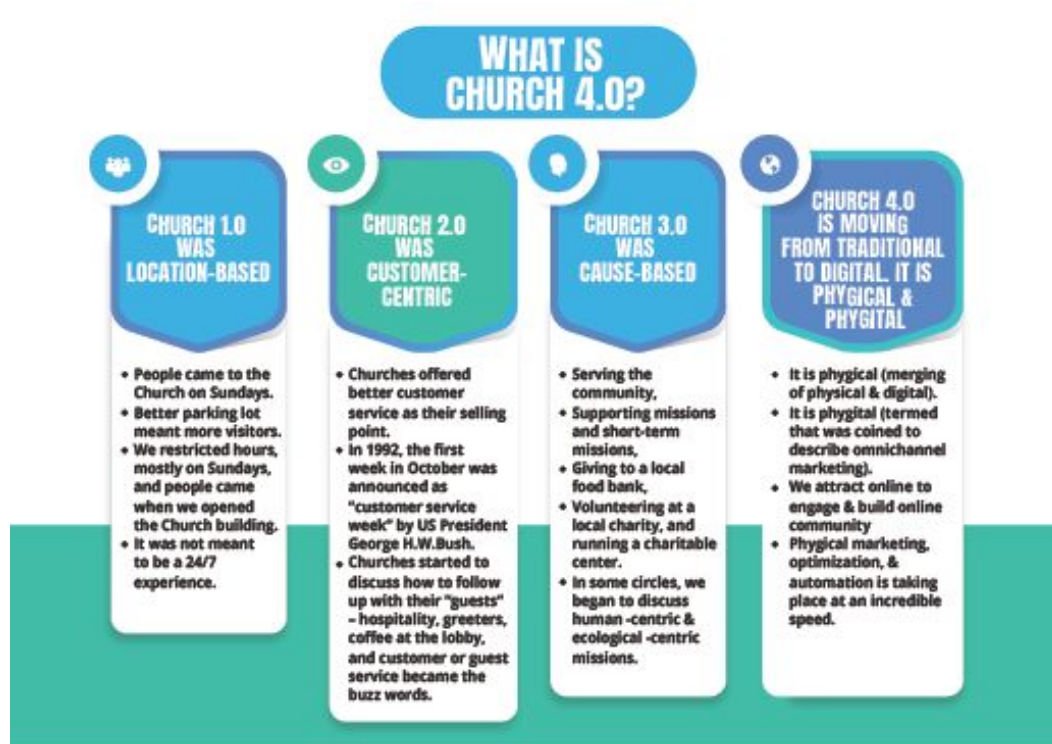
I believe many churches do not go for the best Customer Relationship Management (electric car) because they are happy with the hammer or the process they are using. Automation is all about eliminating manual processes. The toolset that we employ in church administration reflects the leadership mindset and skillset of the team. More than money, the skillset of the team members is the biggest obstacle to getting the right toolset.

We do not go forward by looking into the rearview mirror. The way you go forward is by looking at what is ahead of you. If you plan to organize for growth, you need the best CRM platform to create a connected ecosystem. Progress becomes easier when you have the right technology (toolset). The toolset that we utilize in our church administration is a reflection of our automation mindset.

CHURCH 4.0: THE NEW NORMAL OF LEADERSHIP

I wrote, “*The New Normal for Leadership: Innovation & Technology for Church 4.0*” for Senior Pastors. The new normal is about understanding Church 4.0, Admin 4.0, and Marketing 4.0.

Church 4.0



Church 1.0 was location-based.

Leaders erected church buildings. People came to the church on Sundays. Having a better parking lot meant more visitors. We had restricted hours, mostly on Sundays, and people came when the doors were open. It was not a 24/7 experience.

Church 2.0 was customer-centric.

It was about taking care of “my people.” The 1990s was about better service. In 1992, the first week in October was announced as “customer service week” by President George H.W. Bush. Churches adjusted to better customer service as their selling point. Churches started to discuss how to follow up with their “guests” – hospitality, greeters, coffee in the lobby, and customer or guest service became the buzzwords.

Church 3.0 was cause-based.

Serving the community, supporting missions and short-term missions, giving to a local food bank, volunteering at a local charity, and running a community center became the priority for churches. In some circles, we began to discuss human-centric and ecological-centric missions.

Church 4.0 is moving from traditional to digital. It is phygical and phygital.

Phygical is the merging of physical and digital. Church 4.0 is the marriage of online and offline environments that creates a closer and an authentic engagement. All marketing channels have to work together to create a frictionless and seamless experience.

Phygital is a term coined to describe omnichannel marketing.

Phygical marketing, optimization, and automation will take place at an incredible speed. Take the case of Zappos. It is an online shoe and clothing retailer. They provide personal touch through their call center that removes the barrier of buying shoes online. Likewise, church leaders will utilize online tools to attract and merge with human-to-human engagement. We go to Twitter for breaking news. We eventually return to Fox News or CNN.

There is no “one-size-fits-all” guide available to leaders. The overall size of the church helps to decide the scale of administration.

- Small churches need to attract online viewers and engage with them locally to grow.
- Mid-size churches face the challenge of expansion but controlling costs.
- Large churches need to innovate to avoid burnout.

Marketing 4.0

Marketing has evolved.

- The 1960s - awareness.
- The 1970s - pricing.
- The 1960s and 1970s - unique selling point (USP).
- The 1980s - quality.
- The 1990s - better service.
- The 2000s - technology.
- The 2010s - “phygical” (physical and digital). The “prosumer” now consumes and produces.
- The 2020s - Social CRM is the new reality. We are now looking at creating a community and offering a frictionless ecosystem for generating brand loyalty.

In both his books, Marketing 3.0 and Marketing 4.0, Philip Kotler takes a look at changes that have been taking place. Kotler, in “*Marketing 3.0: From Products to Customer to the Human Spirit*”² discusses the major shift from product-driven marketing (1.0) to customer-centric marketing (2.0) to human-centric marketing (3.0).

Marketing 1.0 is about reading the client’s mind. Companies at this stage do a good job, offer excellent quality products to people, and generate healthy earnings.

Marketing 2.0 is where companies are learning about who they are selling their products to, understand their clients through large databases, offer them a differential service, and set up to fabricate and sell quality goods.

Marketing 3.0 is about providing products, service, and value. “*Only a few advanced companies work in this instance. At this stage, it comes down to understanding that getting to know the client is much more than finding a person interested in your product.*”

Marketing 4.0: “*Online and offline interaction between companies and customers... Marketing 4.0 leverages machine-to-machine connectivity and artificial intelligence to improve marketing productivity while*

leveraging human-to-human connectivity to strengthen customer engagement.” ³

In the Prologue to the book, Marketing 4.0, Kotler writes:

“A lot has happened since we wrote Marketing 3.0, especially in terms of technological advancements. The technologies we are seeing today are not new. But they have been converging in recent years, and the collective impact of that convergence has greatly affected marketing practices around the world. New trends are emerging from this: the “sharing” economy, the “now” economy, omnichannel integration, content marketing, social CRM, and many other things. We believe that technology convergence will ultimately lead to the convergence between digital marketing and traditional marketing. In a high-tech world, people long for high touch. The more social we are, the more we want things that are made just for us.”

Online iChurch (internet church) offering multilingual services will manage 90 languages in their social CRM. We will have to connect over 20 plus social channels to our marketing engagement dashboard. Social CRM is the new reality of the 2020s.

Admin 4.0

We are now at the cusp of the 5th industrial revolution.

- 1st industrial revolution – Mechanisation. Steam and water as the source of power (the late 1700s).
- 2nd industrial revolution – Electricity. Assembly lines for manufacturers (the late 1800s).
- 3rd industrial revolution – Internet and computers. Digital innovation started around the 1980s.
- 4th industrial revolution – Artificial Intelligence (A.I.), robotics, internet of things, connecting at lightning speed, 5G, and voice-enabled technology (start of the 21st century).
- 5th industrial revolution – Next decade.

If you don't remember anything else from this book, remember this one line:

Those who do not understand the online subscription model will get wiped out as content providers.

Every content provider is about to be rocked by Artificial Intelligence (A.I.) in the first five years and Virtual Reality (VR) in the next five years. Universities, schools, and churches should brace themselves for dramatic changes in consumer behavior. Content will be available on-demand, frictionless, and interactive with A.I. to create an experience based on your individual preference.

As a leader, don't drink the Kool-Aid about the new normal. Could it be true that what is new for you has been standard for others? The world is digitally connected. More than half of humanity was online much before the 2020 pandemic. Online the world had already connected 4.2 billion people. 3.4 billion people were sharing their personal information with the world publically through social media channels.

Internet and social media changed the world. Leaders across different industries have failed to understand this change. The irony is that many successful organizations do not feel the need to bend the curve. Some companies choose not to notice what others are already doing. Most organizations don't feel a need to change.

The largest transportation company didn't come up with the idea of Uber. Yet, the old taxi system started to crumble when Travis Kalanick and Garrett Camp founded Uber. Formed in San Francisco, a software app allowed for driver recruitment and customers to order cab services. By November 2015, Uber was valued at USD 70 billion and had spread to over 250 cities around the world.

Hotels like Hyatt or Marriott did not feel the need to introduce Airbnb. Retailers like K-Mart or Walmart did not think about experimenting with online shopping. Yet Amazon survived the dot-com bubble burst by becoming a significant player in online shopping.

Restaurants started to change the way they served their customers. Starbucks launched its mobile ordering app in 2015. McDonald's started rolling out ordering kiosks in 2016.

The entertainment industry was changing too. In 2019, Disney introduced “Disney Plus,” which quickly rivaled Netflix. In just one day, Disney+ had 10 million subscribers. In contrast, it took HBO three years to get five million subscribers.

The banking sector experienced change. In 2015, Atom Bank received its banking license in the UK. It was a move away from traditional banking. The bank had no physical branches or bank tellers. This digital-only bank launched its mobile App. Atom used the Google cloud platform to keep with its growth. By 2017, it became the most preferred bank in the UK. This first “mobile-only bank” was the Uber of banking.

Tractors, bus, and car owners will experience significant disruption due to electric vehicles. Electric cars will be the norm as internal combustion vehicles will be the more expensive option. It is only a matter of time.

The following is taken from the Toronto Hyundai 2017 website:

“Studies have shown that 95 percent of all car shoppers now conduct their research online, and spend 11 hours, on average, researching this purchase. During those 11 hours, consumers will visit manufacturer and dealership websites, dealer review sites, consumer websites, and auto journalist sites and social media platforms.” ⁴

Leaders are still not realizing the full scope of 5G, the internet of things, and voice-enabled technology. Take a picture of all the electronic gadgets you are using today. They will all look slower and uglier in the next decade. Education, entertainment, and experience are the three legs of our stool about to be battered by a tsunami of change.

We were getting clear signals of change in customer behavior much before 2020. Some church or charity leaders still choose to ignore these signs. 2020 was the tipping point. 2021 to 2030 will record a technology carnage that humankind has never seen before. Yet, some leaders are still in denial.

The organizational structure of the 4th Industrial Revolution has changed. Automation and A.I. are changing our toolsets, and we can continue to anticipate changes in our digital marketing approach. Alignment discussions will have to occur as we face a technological revolution covering our website, App, landing pages, webinars, digital content, event

registrations, and survey platforms that help us integrate all data with our CRM.

Executive Pastors now need to have a clear administrative vision about the front-end guest experience, back-end operational structure, and how to build a connected ecosystem by introducing the best CRM. We will have to develop and manage an interconnected ecosystem that provides a better guest experience and data integrity. We will have to go beyond risk assessment to create a risk scoring system for monitoring and compliance. We will have to go beyond hard copies to a document retention platform with O.C.R. scanning. Learning Management System (LMS) needs to integrate into our CRM.

Admin 4.0 is cloud-based. We will have to identify what adds value through customer differentiation and targeting. Digital marketing needs to focus on custom buttons, links, online forms, and landing pages. Leaders cannot ignore automated A/B testing, search engine optimization (SEO), search engine marketing (SEM), and social channels. Marketing campaigns call to action (CTA) involves analyzing metrics that affect our website traffic, target leads, identify changing trends and technologies. We now grade, score, and track our customer communication and engagement, to analyze our customer's needs.

C. K. Prahalad and Venkat Ramaswamy, in their book, *The Future of Competition* ⁵, warn organizations against ignoring a “prosumer.” People are no longer consumers. They are now “prosumers.” They not only consume but also produce. They post about you on their 20 plus social channels. Their review about what they experienced with your service is more reliable than what you say on your website and social posts. Your customers are connected even when your church team is not. The internet and social media have changed the world.

In an era where we are witnessing rapid innovations across all the platforms that we are using, we will have to keep pace with the technological revolution to stay relevant. An understanding of CRM, automation, A.I., data integration, HTML, and CSS is a requirement for those who are leading digital marketing. Admin 4.0 cannot continue in a silo anymore.

SENIOR PASTOR & EXECUTIVE PASTOR IN CHURCH 4.0

The Wharton School of the University of Pennsylvania started as the first school of business in 1881. In 1899, eight hospital superintendents met in Cleveland to establish guidelines for medical practices, which resulted in the formation of The Association of Hospital Superintendents. The Tuck School of Business at Dartmouth College offered the first advanced business degree in 1900. The first MBA program, established by the Harvard Graduate School of Business Administration, a former seminary, was offered in 1908. Business administration has witnessed significant progress. Church administration is still in a modest development phase. Church administration will remain in an infancy phase as long as standardized systems and automation of processes continue to be our anathema.

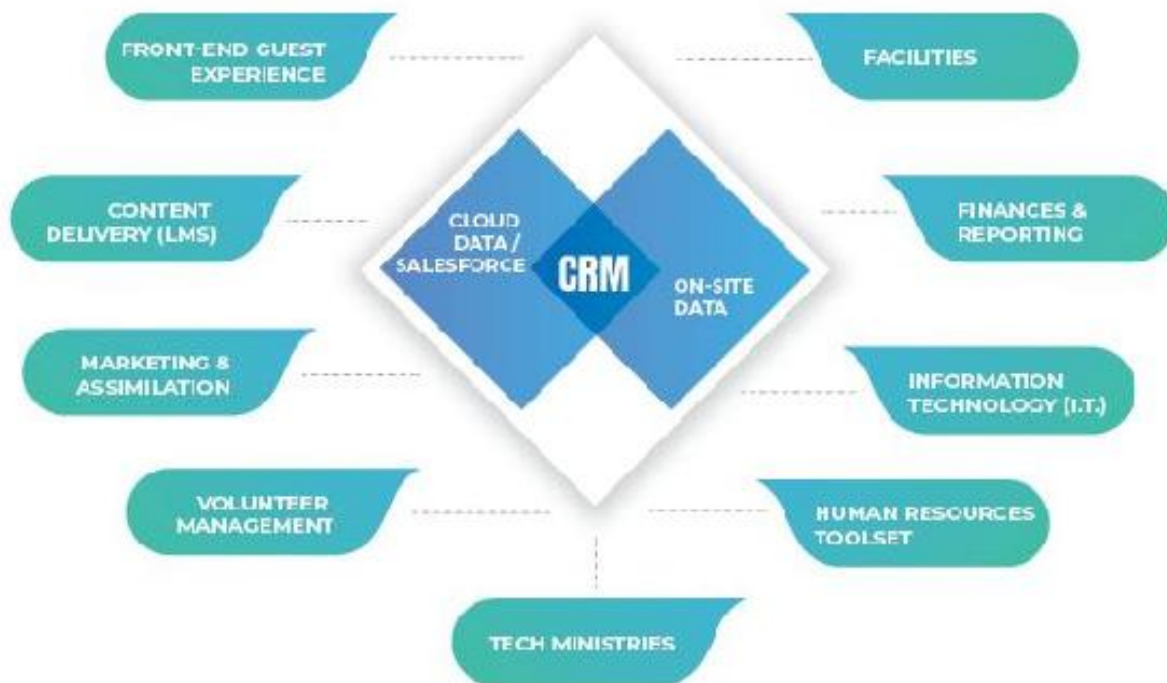
In a church setting, church board and Pastors are not often comfortable with the use of business terms. All leaders are comfortable with driving a car. The last time I checked, a car was an energy converter and a machine that *“releases the energy locked in a fuel like gas or diesel and turns it into mechanical energy in moving wheels and gears.”*⁶ Pastors don’t struggle with energy converters, petroleum fuels made from hydrocarbons, combustion, pistons, inlet valves, outlet valves, sparking plugs, 12-cylinder engines, or using winter tires. No one over-spiritualizes these terms.

Church leaders struggle with business terms like lead management, customer relationship management, social media marketing, and artificial intelligence. We do not have to pull out Bible verses to justify using a GPS in our car. Siri on our iPhones is acceptable. Yet, the integration of A.I. in our churches makes us uncomfortable. We want God to use us. However, we find ourselves throwing stones at mega-churches with 20,000 plus in attendance who use technology.

You can bring in a string of consultants to fine-tune your strategy. Yet, the winning design for a church comes through a soul-searching exercise carried out by the church board and the Senior Pastor. It is a spiritual exercise. The administrative mindset of the Senior Pastor and Executive Pastor needs to embrace optimization. Technology will continue to change the way business is done.

In Admin 4.0, innovation and technology are practical ways to optimize and automate. Branding, better guest experience, audience engagement, multi-generational marketing & connected ecosystems are here to stay. The management and process that churches now need to cover are:

- Strategy & Alignment.
- Finance & Budgeting.
- Human Resource & Training.
- Project & Event Management.
- Marketing and Promotion.
- Risk Management.
- Information Technology.
- Operations.
- Facilities, Inventory, and Emergency Preparedness.
- Business Process Improvement.



Senior Pastor

The Senior Pastor is the spiritual leader, vision caster, teacher, and strategic storyteller. The Senior Pastor is the champion of the church's values and culture. The church needs a clear vision from the Senior Pastor. Without one, it's difficult to achieve buy-in. The Senior Pastor needs to answer three soul searching questions:

1. Who are you as a church?
2. What do you do as a church?
3. Why does your church matter to your community and a new seeker?

In 2004, if Craig Groeschel, Senior Pastor of Life Church, focused on the missional use of technology that allowed them to reach people worldwide. If they had not moved forward with the start of Church Online, they would

not have hired many of the 800 staff members at Life Church. There would perhaps have been no need for Bobby Gruenewalk to serve as their Innovation Leader.

It is the mission and vision that determines the church structure and outcomes. The Senior Pastor should articulate the differentiator. The church marketing team members should not choose the niche in which the church operates. When the senior leadership cannot point to the goal post, team members will aim and shoot all over the place. The leader should identify the main focus of the church.

In a church today, leaders have to wear four different hats.

1. **The Community Hat** – People attend the church or are part of a small group because they want to belong to a community or tribe.
2. **The Cause Hat** – Volunteers give their time and energy to the church because of the cause.
3. **The Care Hat** – People reach out for prayer, counseling, or benevolence as they expect the church to care.
4. **The Corporate Hat** – Board members and meetings, annual business meetings, audit or finance committee, external auditors, and the governance model are all part of a church running like an organization or a corporation (legal entity).

Church leaders have to wear all four hats at different times. The priority must always be about community, cause, and care. The business or corporate hat needs to take second place. There will always be a clash of cultures in a church setting if the focus isn't on ministry first.

The Corporate Hat is always going to be a difficult one to wear. No one in leadership wants to reduce church staff, but it is a reality that we have to face. During the 2020 pandemic, a Christian organization in Mississauga, Ontario (Canada), had to let go of 100 of its 450 staff members.

In church administration, the Senior Pastor must remain the key person involved with the decision to terminate employment and its communication. If done as a last resort, it is best to be transparent about this decision. Delegating such a sensitive matter to Human Resource personnel is not a

good idea. Be generous with the severance package. Be attentive to the emotional needs of staff that remain at the church. Staff morale and confidence will be low as you re-allocate responsibilities. The Corporate Hat makes the tough decisions, but the focus needs to move back to the Cause Hat and Care Hat as you minister to the community.

Members of the team wear different hats. Senior Pastors may approach things from a community, cause, or care perspective. The Senior Pastor provides leadership to ensure that the three legs of the stool are working together effectively. The Executive Pastor probably wears the Corporate Hat most of the time. It doesn't mean that the corporate/executive side of the work is of greater importance than the spiritual side. In a healthy church, all hats are valuable and essential.

In the Start-up and Ramp-Up Phase, it is common to see the Senior Pastor as the primary connection to church staff. In the Maturity and Expansion Phase, the Senior Pastor may want to connect to the Pastoral team directly. In contrast, the Executive Pastor serves as the direct connection to the administrative team. It's not uncommon in the Expansion Phase and Mega-churches for the Senior Pastor to directly connect to the church board and big donors. In contrast, the Executive Pastor serves as the primary connection to the staff.

While hiring, a church should look for exemplary character, chemistry, and competency. The Senior Pastor must be part of both the hiring and firing process. Executive Pastors should not hire outside the Senior Pastor's knowledge. Executive Pastors should ensure that job offers are based on skills and not due to compassion. Administratively, all staff, including pastoral staff, except the Senior Pastor, should directly or indirectly report to the Executive Pastor. Human Resource activities like hiring, firing, discipline, and termination process need proper and confidential oversight.

Different leaders will have different leadership styles:

- Authoritarian style: Senior Pastor works alone.
- Participative style: Senior Pastor involves group members and those doing specific tasks.

- Laissez-faire style: Senior Pastor does not give any direction to the group.

Mike Bonem and Roger Patterson, in their book, *“Leading from the Second Chair: Serving Your Church, Fulfilling Your Role, and Realizing Your Dreams,”* present the paradox of an Executive Pastor being a leader in the church and a subordinate to the Senior Pastor. It’s a good read.

The Executive Pastor needs to understand the Senior Pastor’s mindset. This role involves knowing what the Senior Pastor thinks, why the Senior Pastor is feeling this way, and where the Senior Pastor is going with the church. It is essential to recognize the leadership style of the Senior Pastor and how the leader operates. Try to observe which of the two rooms your Senior Pastor spends more time in:

1. Strategy Room: What to do?
2. Execution Room: How to do it?

In determining a Senior Pastor’s mindset, consider two scenarios:

- If the Senior Pastor has been in a small church for a long time, they may like to be hands-on. They want to be involved with every micro issue. Some do not like strategic planning. They spend more time in the Execution Room and less time in the Strategy Room.
- Other Senior Pastors face time constraints better. They give importance to all macro and some mezzo (mini) issues. They do not want to be bothered with the micro issues.

Executive Pastor

“The significant problems we have cannot be solved at the same level of thinking with which we created them.” - Albert Einstein.

Church leaders may be uncomfortable using business terms for church leadership roles. You can understand the role of an Executive Pastor in terms of a COO – a Chief Operating Officer. Executive Pastors have a spiritual function, but they also act as church administrators.

An Executive Pastor is a senior church leader who oversees the administrative operations of the church. This person typically is not hired to carry out a weekly preaching responsibility. In some churches, the Executive Pastor may be called an Administrator or Administrative Pastor. Other churches may use the title Business Manager or may split the responsibility between an Associate Pastor and a Chief Operating Officer, an HR Director, or an Operations Director.

The Executive Pastor needs to understand their multipurpose role, duties, and responsibilities. They need to understand the level of authority related to other staff as outlined by the Senior Pastor. The role of an Executive Pastor is defined differently. Some churches choose to hire an Executive Lead Pastor or go with a hybrid between an administrator and a Senior Associate Pastor, managing ministry leaders.

Start-up Phase (0-200 in attendance) will not need an Executive Pastor. In a smaller Do-It-Yourself (DIY) Church, the Senior Pastor or volunteers cover administrative functions. As a church keeps growing, operational tasks become more complex than what a Pastor or a volunteer can manage. As the church moves to the Ramp-up Phase (300-800 in attendance), it will restructure the church administrative roles. Professional expertise is eventually needed.

During the Ramp-up Phase, Maturity Phase, and Expansion Phase, a Senior Pastor or the church board may hire an Executive Pastor. As the church grows, there is a need to hire an Executive Pastor who understands finance, human resources, facilities, risk management, compliance, emergency preparedness, information technology (IT), and cybersecurity. Operational oversight has to manage backend risk management issues. Administrative oversight covers legal matters, document retention, liability waivers, parental consent, insurance, and security. Guest experience, CRM & automation, social channels, digital marketing, analytics, and data integration is now an integral part of Church 4.0.

Mega-churches on the other end of the spectrum may design the operations and administrative side of the church differently. Mega-churches hire many more Directors and staff members who manage administrative tasks. Reporting hierarchy is different. Mega-churches may follow a different

structure once they go beyond the Expansion Phase (2000 to 3000 plus attendance).

Let's take a brief look at four Mega-churches in the USA that are structured differently:

1. North Point Ministries (Andy Stanley, Senior Pastor), Alpharetta, Georgia.
2. National Community Church (Mark Batterson, Lead Pastor), Washington, DC.
3. Life Church (Craig Groeschel, Senior Pastor), Oklahoma.
4. Crossroads Church (Brian Tome, Senior Pastor), Cincinnati.

North Point Ministries (Andy Stanley, Senior Pastor), founded in 1995, has grown from one church in Alpharetta to six campuses in Atlanta, USA. Thirty thousand people regularly attend their services each week. By March 2019, North Point Ministries had 541 staff members (excluding Week Day Preschool staff), with 47 percent of their operating budget designated to salaries and benefits. North Point Ministries has an Executive Director of Ministry Services. They also have an Operations Director, Facilities Director, Web Director, Resources Director, Accounting Director, HR Director, and a Director of Special Events. In addition, they have a full-time data visualization expert tracking engagement and retention numbers.

National Community Church (Mark Batterson, Lead Pastor), founded in 1996, now operates six sites in the Washington, D.C. area. Joel Schmidgall, Executive Pastor, "oversees the pastoral staff for NCC's seven locations and pastors the Capitol Hill location. He also provides leadership to missions and outreach initiatives and serves on the weekend teaching team." Jim Tanious, COO & HR Director, became responsible for "overseeing the operations" of NCC when he joined the team in 2011. As the COO, he focuses on human resources, contracts, property, and manages the operations team.

Life Church (Craig Groeschel, Senior Pastor), founded in 1996 as Life Covenant Church in Oklahoma City, was started with 40 congregants meeting in a two-car garage. Life Church has 800 staff members. Bobby Gruenewalk, as their Innovation Leader, overseas YouVersion Bible App,

Open Network, Church Online, Information Technology, Communications team, Creative Media, Spaces, and Places.

Crossroads Church (Brian Tome, Senior Pastor) in Cincinnati was founded in 1996 by marketing pros from Procter & Gamble (P&G). They found their leader, Brian Tome, with a classified ad. The core group had pooled their money to promise Brian a one-year salary. As a group member who founded the church, Vivienne Lee Bechtold, is a former global brand manager at the consumer-products giant. Her husband, Jim, is a retired P&G marketer. Brian Wells wrote speeches for company executives and has worked in marketing for P&G. Four hundred fifty people met in a rented facility in the first year. By 2017, the church had 30,000 members worshipping in nine locations. With an annual operating budget of \$33 million and a staff of 274 people, many with ties to Procter & Gamble, they employ sophisticated marketing techniques.⁷:

“Among the employees is a 75-person “experience team,” the equivalent of an in-house advertising agency, whose branding efforts encompass direct-marketing campaigns, in-church clicker surveys, and customized stage sets aligned with sermon themes. The church also has a lab division—essentially a two-person market-research team led by a corporate brand ethnographer. Its eight satellite churches operate almost as franchises, all of them mirroring the main branch’s tailored signage and other brand imagery. Congregants all watch the same sermons, which are telecast from the main church to the satellites with a brief delay.”

The Senior Pastor and church board are like the pilots sitting in a cockpit, giving direction and building a great program. Beverages being served or not served to the passengers during turbulent times occupies the Executive Pastor’s mind. They focus on the frictionless operational aspects of the church.

The vision of the church comes from the Senior Pastor. The idea behind a connected ecosystem often comes from the Executive Pastor. The Executive Pastor occasionally preaches or conducts a wedding or a funeral. The Executive Pastor or the Executive Lead Pastor is usually not the Teaching Pastor. Every church has someone on the team managing the administrative work like staff, budget, facilities, and operations. The Executive Pastor or

the Executive Lead Pastor focuses on the whole organization to ensure it is not functioning in silos.

The Executive Pastor has to oversee church operations, and as such, they are considered a “jack of all trades.” Therefore, continually gaining expertise on the broadest range of subjects is a requirement for Executive Pastors. In Admin 4.0, this is an ongoing process. Your ability to manage organizational complexity is the differentiator. It does not mean that you have to control everything, but you have to have a broad knowledge of many things. Administrative complexities are managed by involving subject matter experts, delegated to others, or automated.

Operational areas must live out the values of the church. Stewardship is a ministry. A more efficient organization leaves more dollars for ministry. The Executive Pastor is the communicator of this message. Avoiding burnout and the well-being of the team members and volunteers is a concern for any administration.

Church administration needs to focus on stewardship for the Kingdom. Mission, vision, strategy, governance model, policy, and procedures are right at the top of this list. Planning, goals, project planning tools, measurements, and risk scoring need attention. Leadership cannot overlook compliance, legal, human resource, finance, facilities, security, insurance, and emergency preparedness. The Executive Pastor needs to focus on team building, coaching, training, mentoring, and organizational development.

Church administration is an example of servant ministry. The Executive Pastor cannot be business-focused only. The Executive Pastor needs to understand the people’s side of administration. An Executive Pastor is a direct representative of the Senior Pastor. The business tone needs delicate handling.

The reality is that Executive Pastors will occasionally encounter a micro-managing board. Do not be surprised if you find that a church board does not clearly understand its role. All board members are a group of people. From time to time, you might find that a church board consists of the wrong people. You may find that your Senior Pastor is struggling with traditions pushed forward by the board that may not align with the Senior Pastor’s vision for the church.

“It isn’t the incompetent who destroys an organization. The incompetent never get in a position to destroy it. It is those who have achieved something and want to rest upon their achievements who are forever clogging things up.” – F. M. Young.

The job of an Executive Pastor is to ensure that the management is not weak. Executive Pastors have to work diligently to ensure a good relationship exists between the board and church leadership. Church staff should not be incapable of managing church operations properly.

While the Executive Pastor takes the time to understand the Governance model and the Senior Pastor’s leadership mindset, the focus needs to be on building the team’s skillset. The toolset is easier to introduce when your team is willing to accept eliminating manual processes through automation. Here are a few areas that may need attention:

- Know your team – chemistry, culture, and competencies.
- Encourage growth and learning of team members – follow a Developmental Model and not a Replacement Model.
- Value time and create a margin – honor the Sabbath as a day of rest, a value statement that we should hold dear to us as leaders.
- Work ethic – running a church is like running a business. Tasks and timelines matter.
- Multi-generational communication – we are now working with five generations of people at our workplace and in the church.
- Internal communication – emails are an inefficient way of managing projects. In 1970, Xerox management allowed Jack Goldman, chief scientist, to create the Palo Alto Research Center (PARC). PARC first used email in 1971. They are not for project management and team collaboration. The problem with an email culture at the workplace is that you have to read all the emails to find a few action items.

Moving away from an email-driven project management culture is critically important. If your inbox has hundreds of new emails, this is a clear sign that the church does not have an event or project planning tool. Consider utilizing an Internal HelpDesk to move

your team away from email communication to a team collaboration platform. Following the “email way” does not mean it is the right way. A team collaboration toolset is one of the first internal processes that is needed.

- Meetings and agendas – define who is responsible for different functional areas.

Leadership author Patrick Lencioni discusses the “meeting dosage” in his book *Death by Meeting*.⁸ Patrick provides four structure of meetings:

1. Daily Check-in: 5-10 minutes.
2. Weekly Tactical: 45-90 minutes.
3. Monthly Strategic: 2-4 hours.
4. Quarterly Off-site Review: 1-2 days.

Whether you follow this model exactly is less important than paying attention to structure and dosage. When you get these right, you will have to set the agenda around the activities that will drive connection instead of just “*getting together*.”

Meetings are not a religious ritual. Eliminate unnecessary meetings. Cancel meetings if there is nothing on the agenda. Bad meetings do not create motivation.

- Document retention and purging – understand the state of document retention at the church.
- Emergency Preparedness – Are team members prepared for all kinds of emergencies?
- Church administration has much to cover. Both time and money are limited resources. Your administrative vision needs to be clear about your optimization strategy.

FIRST 90 DAYS: DISCOVERING THE CHURCH CULTURE

Church Culture:

“The unexamined life is not worth living.” – Socrates.

In 1940, during the Second World War, France was about to fall to the Germans. Neville Chamberlin was planning on resigning as Prime Minister of England. He called Winston Churchill and Lord Halifax to his office and said: *“One of the two of you will have to replace me. Who is it going to be?”*

Churchill later wrote, *“I know no Englishmen would ever say ‘Give it to me.’ So whoever spoke first would be the loser. It was the longest 30 seconds of my life, but nothing induced me to speak.”* Eventually, Halifax said, *“Well, I suppose you’d better give it to Winston.”* Churchill became the Prime Minister.

Silence is imperative during the first ninety days of your engagement at the church. Listen more and speak less. Unless you are walking into a real crisis, the general rule in the first ninety days is to learn and listen. You need to understand the church’s DNA and its governance model. You want to understand what your Senior Pastor wants from you.

Take the time in the first ninety days to read God’s Word, pray, listen to God and to those who are working with you. The first ninety days are a perfect time to observe and ask questions. It is a time to get to know your team members, personalities, and roles at the church. Think of three questions as you commence a new church assignment.

1. How can we make the church better?
2. How can we solve our problems?
3. How can we add value?

Executive leaders need to learn from the past, assess the present, and have an administrative vision for the future. The first ninety days should include conversations with team members and volunteers involved with various church activities. Keep it informal but intentional. Ask for a response from different points of view:

- In the past, what has the church done well?
- In the past, where did the church fail?
- In the present, what are you hoping the church will do?
- In the future, what do you fear that the church will not do?

The purpose of observing in the first ninety days is to gather information from a few perspectives:

- As a historian, you want to know when did the church start and when did it begin to “go wrong.” If nothing is wrong, you are a very fortunate leader.
- As a photographer, you want to understand the larger picture and where you fit in the picture.
- As a storyteller, you want to understand the significant visible and invisible characters in this story that will impact the story as it moves forward.
- As a student, you want to learn a few lessons before your ninety days are over.

In the 1980s and 1990s, North American churches started too many programs to reach the unchurched. We offered study groups, support groups, and programs based on needs. Offering so much eventually lead to the creation of complex church structures. Many church websites are a reflection of church leaders finding it challenging to eliminate programs. Take a note of what your church is carrying over as part of their tradition, which does not fit with the church’s mission or the Senior Pastor’s vision. If entrenched in the DNA of the church, you may not be able to change it in a hurry. It would be best to be mindful of it.

Try to understand the tensions or thorny issues that you might do well to avoid initially:

- Plank of wood:
What area in the church cannot change easily? Like a plank of wood, it is now part of the church DNA.
- Rope:
Some areas that can be pulled away, provided you have taken the time to tie it with a rope before removing it.
- String:
What is the area where you have to be careful not to try too hard? It is like a piece tied with a string line that will break.
- Glass:
What is the area where you should tread carefully since, like glass, it may shatter?

Initial Discovery:

Determine the Leadership Mindset, the team's Skillset, and the available Toolset. You want to be aware of any other urgent issues. Evaluate ongoing legal problems and situations that require legal advice. Meet with the church attorney, if any, to gain a better understanding. The list of items that need attention includes:

- Incorporation documents,
- Church by-laws,
- Employment law, termination policies, and employment letter template, and
- Financial policies.

Your initial discovery should cover church finance, liability, insurance, taxation, receipt process, wills and estates, hiring and training practices, counseling coverage, contracts, church trademark, copyrights, and church documentation process.

Church Strategy:

Formulate a strategy using both quantitative and qualitative information. Finding what the church has and does not have is insightful. It includes:

- Policies and procedures,
- Financials, audited statements, financial policies, annual reports, and budgets,
- Reports and dashboards,
- Church trademark,
- Church insurance,
- Website,
- Employee handbook, and
- Document retention.

Planning:

Take time to plan your administrative vision. It will cover:

- The skillset of team members,
- The toolset that is in use,
- Guest experience,
- Finance and cash reserves,
- Building and maintenance,
- Compliance, risk assessment, and risk scoring,
- Training, and
- Process change and improvement.

Reorganize, Innovate, Delete (R.I.D.):

An executive leader knows that there are administrative areas that they will have to reorganize, innovate, and delete manual functions. Before any of this occurs, a leader needs to take the time to understand the strategic alignment process in their role of serving the church's vision, the church board, and the Senior Pastor.

In the first ninety days, executive leaders need to understand the size of the church and the team's bandwidth. The goal is to maintain a balance between

what is available and what is required. Sometimes churches try to do more than they can manage well.

MoSCoW Technique for Prioritization:

Will you boil the whole ocean or a few cups of water? The *MoSCoW technique* and the *Ranking method* will help you to prioritize multiple things that may need attention.

Must-Have Requirements	Must (M)	Senior Pastor or the church board wants this to happen.
Should-Have Requirements	Should (S)	High-Priority – compliance issues.
Could-Have Requirements	Could (C)	Nice to have, but it may not be possible at this time.
Won't-Have Requirements	Won't (W)	Not applicable to your church or won't happen.

Must-Have Requirements: Let's assume that there are four things that the Senior Pastor or the church board requires.

Should-Have Requirements: Let's assume you have 20 high-priority tasks.

Could-Have Requirements: Let's assume you have six things that would be nice to do but may not be possible at this time.

Won't-Have Requirements: Let's assume you have 15 things that will not happen. These 15 items do not apply to the church, or you feel you cannot tackle this.

Must (M) Requirements	4	Senior Pastor or church board wants this to happen.
Should (S) Requirements	20	High-Priority – compliance issues.
Could (C) Requirements	6	Nice to have, but it may not be possible.
Won't (W) Requirements	15	Not applicable to your church or won't happen at this time.
Total	45	Areas Needing Attention

The MoSCoW technique gives clarity and will help you avoid trying to boil the whole ocean. In this exercise, applying the MoSCoW technique has narrowed down to 24 cups of water. You may decide to boil six cups of water. You have identified 15 cups of water that you will not use. It will help to apply the Ranking Method.

The Ranking Method:

The Ranking Method will further help prioritize requirements based on importance or higher ROI (Return on Investment).

- **Must (M):** The first 4 cups are what the Senior Pastor or church board wants. They are non-negotiable. The must-haves get the highest ranking of 1, 2, 3, and 4.
- **Should (S):** Rank the list of 20 cups from highest to lowest importance.
- **Could (C):** Rank the list of 6 cups from highest to lowest importance.

You may have many tasks (cups) under the Must (M), Should (S), or Could (C) column. The list of things to do needs be realistic and achievable. By ranking the order of importance within each list, you are able to determine which projects should be tackled first and scheduled for completion later.

The Balanced Scorecard:

I have been using the Balanced Scorecard for over twenty years. A balanced scorecard can help you create internal metrics that will help you monitor performance in four areas. Here is how you can utilize the Balanced Scorecard in the church context.

1. **Financial Perspective:** To achieve our goals, what are we doing in the area of finance?
2. **Church Member Perspective:** To achieve our goals, how should we appear to our church members?
3. **Process Perspective:** To satisfy our church members and volunteers, at what business processes must we excel?
4. **Learning & Growth Perspective:** To achieve our vision, how will we sustain our ability to change and improve?

Bring your tasks down to sixteen:

You used the MoSCoW method to outline 4 “must-have” tasks from the Senior Pastor or the church board, and 12 other “should-have” came from the 12 highest-priority given in the Ranking Method. You need to place four tasks under each of the four Balanced scorecard areas. You are not able to look at 16 jobs (cups) with the highest ROI.

Goal Setting:

During your first ninety days, unless there is a crisis that needs urgent attention, start slowly, and intentionally build your plan. Spend more time in the first year working with the team and developing solid relationships than accomplishing goals. If you can, only do half of what you’d like to achieve during the first year.

Once you are clear about the 16 cups, you are no longer overwhelmed by all the water in the ocean and the number of cups that need attention.

At the end of your time of analysis, as an executive leader, you have done the hard work of listening and observing. You have searched for opportunities and now have clarity regarding what needs to be removed or reduced. You understand the scope of what needs to be changed and how to manage that change. You can now set clear goals and timelines. Based on the leadership mindset, skillset, and toolset available, you need to eliminate manual processes. Your goal will be to organize for growth through automation and optimization.

Six things a leader should focus on during the first year:

1. At the end of your first ninety days, present the administrative focus to the Senior Pastor for his feedback and approval. In the book, *Simple Church*, Thom Rainer and Eric Geiger define focus as “*the commitment to abandon everything that falls outside of the simple ministry process.*”⁹
2. Once you have gained the buy-in from the Senior Pastor or the church board, the next step is to create internal metrics for the Balanced Scorecard with your team. You can utilize the R.A.S.C.I. matrix to provide further clarity of roles and responsibilities among the team members.

RASCI	Definition

Responsible	Who does this work?
Accountable	Who is responsible for the task?
Support	Who provides support during the implementation of the activity or service?
Consulted	Who are the people who need to give input before the work is signed-off or done?
Informed	Who are to be kept in the loop about the progress or the decision?

3. During the first year of serving as an executive leader at the church, three discussions should take place between you and the Senior Pastor:

- a. **Sabbath** – A significant value senior leadership can introduce at church is a day of rest for staff. Honoring the Sabbath helps us to work from a place of rest for the remainder of the week. Senior leadership has to set this tone. Therefore, if church staff work on Sundays, then discuss which day of the week will be honored as the day of the Sabbath, according to God’s commandment.
- b. **Interim Leader** – Discussion needs to occur about who the Interim Leader will be if the Senior Pastor can temporarily perform their job functions. Determine who will communicate daily operations to the staff.
- c. **Succession Planning** – Develop a strategy for all key responsibilities. Outline the process of hiring new leaders. Introduce an apprenticeship model to train others to assume higher levels of responsibility. When it comes time for senior leadership to retire or step down from their role at church, a developmental model should have excellent candidates waiting to take up these responsibilities.

4. Implementation of your administrative plan in the first year will depend on four things:

- a. Character and work ethic of the team players.
- b. You create a set of internal metrics for the 16 items on the Balanced Scorecard and utilize the MoSCoW technique to

clarify what you won't do.

c. You are building relationships and managing conflicts.

d. You are introducing new toolsets to keep your team at the cutting edge of technology.

5. Lead by example and make an intentional plan to equip, motivate, and celebrate milestones of the church and team members.

6. Provide feedback to senior management and your team.

Think of your time as an executive leader at your church as four quarters:

- First Quarter: Where to start?
- Second Quarter: How to organize for growth?
- Third Quarter: How to automate and optimize?
- Fourth Quarter: How to leave a legacy behind?

Complimentary **Strategy Session** training is available at www.amitabhsingh.com

Although it is good that a *Self-Assessment Tool*, *MoSCoW Technique*, the *Ranking Method*, and the *Balanced Scorecard* helps us to identify 16 areas to organize for growth, you may still need the complimentary strategy session training to take you to the next level.

THE DASH: ONE TO TEN

“A leader is one who mobilizes; one whose focus is influencing people; a person who is goal-driven; someone who has an orientation in common with those who rely upon him for leadership; and someone who has people willing to follow them.”

- George Barna.

Take a look at tombstones. They all have three things in common. They have a start date and end date, and in the middle, there is a dash. An executive leader's life span is like that. We have the first day and last day at work. What matters most of all is the dash - months and years - represented between these two dates.

In the first ninety days, an executive leader intentionally creates a checklist of the things that need attention. Your dash at the church where God has placed you will only last for a short while. So when you are walking away, how will your eulogy be read about the actions you supported? Will you be proud of the things they say about what you did? Will you be proud of the way God will say that you honored His Sabbath? An executive leader should consider a day of rest for everyone who comes together to work and worship.

The dash represents your life spent at the church. Your first ninety days will impact your last ninety days. When you leave - everyone who you worked with will know what that dash is worth. It doesn't matter what you inherited. What matters is how faithfully you heeded the voice of God and worshipped the Maker of all things in your actions.

1. Church Governance 1-2-3

One: Governance

A governance model needs to establish, implement, and monitor church policies and procedures. Good governance requires an appropriate structure and due diligence. During the first and second

centuries, the church wasn't an organization. It didn't have to manage accounting, complete audits, track tax receipts, lifestyle agreements, or properties.

An executive leader will inherit the church by-laws. Executive leadership needs to take the time to understand the overall corporate structure and process that the church has in place:

- Membership structure and meetings
 - Corporations and unincorporated associations must have members.
 - Membership can be open or closed where directors and members are the same people.
 - An accurate list of church members is maintained to ensure who cannot vote or receive notice regarding membership meetings.
- Board structure and meetings
- Church Officers
- Governing documents: Corporations must have by-laws. The church must meet Income Tax Act, IRS (USA) or CRA (Canada) requirements, keep books and records, and complete annual filing requirements (T3010 in Canada)
- Other key issues such as who is authorized to do banking and sign documents or manage indemnity or conflicts of interest

A healthy church board's role is to take on the responsibility of stewardship at the church. You are fortunate if the board has adopted a strategic planning process. The board should be ensuring that the church administration has a process in place to identify critical risks. The church board should oversee the integrity of internal controls and systems. The church board should focus on key indicators for success. They should pay attention to measurable results within specific timelines to monitor operations.

Questions to consider:

- Does the board have policies requiring internal accountability? Are these being implemented?

- Does the church maintain vital elements of verifiable accountability and transparent oversight?
- Does the church demonstrate integrity and transparent communication?
- Particular roles and responsibilities need to be clear:
 - What does the board need to decide?
 - What information does the board need from the Senior Pastor?
 - Does the board ask questions of the Senior Pastor?
 - What decisions are reported to the board?
- Measurable results within defined timetables

The church board and the governance model of the church should also help structure a leadership succession plan and hire/fire the CEO or Senior Pastor, as needed. The Senior Pastor and Executive Pastor should know that the board will hold them accountable.

Two: Matters for Church Board

Church policies, procedures, and conflicts of interest are part of a good governance model of a church. The church board has to provide oversight of both the board and the church member's annual meeting. There are rules for meetings, and relevant documents need to be up-to-date based on the governance structure. As a general rule, a church cannot pay a director to act in the capacity of a church board member. Board members have fiduciary obligations concerning church property.

Constitution, Bylaws, Trust deed or equivalent

- The constitution is mutually agreed-upon principles and structure that rules the affairs of the church.
- The bylaws are subordinate rules adopted by the church that sets boundaries regarding church directors, officers, and members.
- The charity can choose to organize as a charitable trust. Some churches have 'Trusts' in law that govern the life of the church. The founders who provided the funds may have set up a Trust

Deed. This document includes a ‘primary trust’ that provides the fundamental reason for its existence.

- A trustee in a church is usually a member of the church’s board of trustees. Trustees are responsible for the financial aspects of operating the church.

Church/organizational rules – Governance Model

Many church boards follow John Carver’s Policy Governance model. The premise is that boards govern and don’t manage or administer.

Governing Documents

Church leadership needs to think about corporate or non-corporate documents, Bylaws, employment, and non-employment policies. The church should be documenting board minutes and corporate records that include charitable registration numbers and year-end filings. Legal matters may cover:

- Membership,
- Property,
- Purchases and loans,
- Resignations,
- Member disputes and discipline,
- Lifestyle agreements, and
- Amendments to the governing documents (bylaws, articles of incorporation, adopting new policies, and resolution).

Doctrinal statement

Doctrinal statements are called a ‘statement of faith,’ a ‘creed,’ or ‘confessions.’ These documents connect the church to its historically Christian roots, teach believers how to apply biblical principles, and shape values for ministry. ‘What do you believe?’ is one of the first questions people ask about a church.

Insurance and Liability coverage for Board members

All churches need property insurance. Directors and officer (D&O) liability insurance protect the personal assets of directors and officers and their spouses if personally sued for actual or alleged wrongful acts. D&O insurance cover losses associated with the lawsuit, including legal defense fees. Errors and omissions insurance (E&O) protects a representative of your church and the church itself.

Conflicts of Interest & Code of Conduct

These are commonly agreed values. This document should reflect the desired integrity of the church in a format that board members and church employees understand. Church leadership must act in the church's best interest that supersedes personal gain by avoiding actual or appearance of conflict-of-interests.

Church Trademark, Logos, and Copyright Transfer Agreements

Churches moving from Start-up and Ramp-up Phase to the Maturity and Expansion Phase should consider protecting their name, words, and logos under the Trademark law. It's good practice to register all recognizable website domain extensions that are attached to your church name, such as .com, .net, org, .co, .us, .ca, and .tv. Many churches do not consider providing clarity on copyright issues. Who owns the website, church App, e-books, or songs created by a church staff member or a consultant? The church should address copyright issues in its employment letter. It should also look at having a signed Copyright Transfer Agreement for specific work like the church website, church App, etc.

Church Annual Meeting

In many churches, it's the responsibility of the governing board or the Senior Pastor to plan for the annual meeting. Here are a few things to consider:

- Time and place of meeting that is in keeping with bylaw requirements.
- Official notice requirements.
- Determining the purposes of the annual meeting.
- Who adopts the agenda for the meeting?
- Deadline for receiving reports.

- Distribution of reports.
- Visual presentation at the annual meeting.
- Promoting the annual meeting.
- Presiding at the annual meeting, what constitutes a quorum, and rules for voting and discussion.

Robert's Rules of Order

It is a parliamentary procedure manual that many churches use to ensure the meetings are fair, democratic, and orderly.

Church Membership Policy

The church board should discuss requirements for membership, membership classification, membership rights, termination of membership, restoration of members, and voting limitations if any.

Lifestyle Agreements

Evaluate the beliefs and agreements you require from your members, board members, staff, and volunteers. The document needs to reflect the faith commitment within your theological framework. Seek legal counsel, board approval, and change in the job description or employee handbook may be necessary as you implement this agreement.

Complaints Policy/Whistleblower Policy

Church board needs to ensure that an employee can report suspected misconduct, illegal acts, or other concerns without being mistreated or lose their job because they highlighted their concerns.

Baptism and Communion Policies

Different churches will have different positions on marriage, baptism, and communion.

Denomination Guidelines

A religious denomination governs and provides guidelines to many churches. Most denominations wish to have their clergy solemnize marriages. The church board should be aware of these guidelines.

Audit Guidelines

There are two types of audits. An outside CPA performs an external audit. The church board should look at ways to verify reports of the treasurer(s) independently. The auditing guidelines should consider:

- Accounting controls.
- Segregation of duties.
- Systems and procedures that include the size of the church and its budget.
- Compliance covering annual filing (T3010 in Canada), receipting, maintain direction and control of foreign charitable activities, bank signatories, and fundraising regulation.

Temporary Leadership

The church board and Senior Pastor should work together to develop emergency preparedness if a leader is temporarily not able to perform their duties. There should be clarity as to what will happen if the Senior Pastor becomes temporarily unavailable due to an accident or sickness.

Sabbatical Leave Policy

A periodic release from full-time pastoral duties enables a Pastor to engage in personal spiritual enrichment. The church board needs to consider the long-term benefits of a sabbatical leave.

Document Retention Policy

A retention policy provides a purging guideline. It lays down the rules for managing, retrieving, and purging vital documents. Some documents have to be permanently maintained, while others purged after a certain period. Without a written policy, board members and staff will struggle to interpret the compliance standards and who are authorized to approve the purging of documents, both electronic and hard copies.

Succession Planning

It is not an impulsive thought. Succession planning needs to be an intentional and a prayerful exercise. A Senior Pastor's transition is a critical and spiritual moment in the life of a church. It is a sensitive matter and should not be discussed openly without a proper communication and succession plan.

Three: Board Recruitment & Development

Recruiting the right church board can be a challenge. Many attending our church are not made aware of how they can contribute their time and skill. Running unfocused committees in the church provides a poor experience to many of our high-capacity church attendees. The church board should set aside time to design a board recruitment plan and a development process.

The annual business meeting is an excellent time to clarify about the role and expectations of board members. Many churches have not developed a job description or time commitment required from a potential board member. Board member training and orientation are not always available. Church leadership should think about how to communicate what they are looking for in a new board member. The chairperson of the board should present current challenges to the list of prospective board members. Church board recruitment is a necessary process.

The church board will have to look at their best practices. Here are a few to consider:

- Are there too many committees listed in the church bylaws?
- Are there too many board members serving on the church board?
- Can a staff member vote on the church board?
- Does the church board have more than a Senior Pastor voting?
- What is the spiritual qualification for a board member?
- How can a board member be removed?
- How does a Senior Pastor get hired or fired by the church board?
- Should close relatives and spouses of the Senior Pastor serve on the church board?
- Recruitment of church board members
- The orientation of a new board member
- Clarity on the role of the board
- How to handle conflicts?
- How are decisions made?

- How to avoid creating a micromanaging board where board members step in to make day-to-day decisions?
- How to maintain a relationship with the Senior Pastor?
- How to create an emergency leadership plan and a long-term succession plan for the Senior Pastor?
- How to design a church board compliance dashboard?

2. Finance & Budget 1-2-3

“We have no money. We shall have to think.”

– Winston Churchill.

Churches do not have unlimited resources. Managing finances wisely and developing a written financial policy and budgeting is an essential exercise for any non-profit.

One: Church Finance Policies

Executive leaders and church treasurers use the financial manual and accounting policies for better stewardship, procedures, and financial management.

Financial management should help staff, volunteers, finance committee, and executive leadership maintain integrity at the church. Assets need to be protected from waste, fraud and minimize misuse.

Financial Planning

should help the accounting team understand how financial systems and procedures fit together.

Budget

Budget controls should help with planning and managing resources for efficient operations. The first step towards monitoring and eliminating financial risk is maintaining a repository of account and bank signatory. Internal controls around a church credit card, petty cash, and donation handling need monitoring.

Earmarked Gifts

The church accounting team needs to be clear about earmarked gifts. The church needs to retain direction and control over the use of a donation. A donation earmarked for an individual may not be tax-deductible. Your accounting team needs to be aware of when earmarked gifts are not deductible.

Gifts-in-kind

are gifted other than cash. Official donation receipts may be issued for these donations. Donating time is not a transfer of property. The church cannot issue an official donation receipt for services donated.

Fundraising Activities

A church may use a portion of its resources to carry out appropriate fundraising activities. Churches need to be transparent and make sure that all fundraising methods are within acceptable legal boundaries. Fundraising is not the main purpose of the church. Fundraising cannot be illegal or deceptive.

Accounting Practices

Expense approval, purchase approvals, inventory control, and payroll process are all areas that need to be efficient. The accounting team also has to cover clergy residence deduction.

Cash Reserve Policy

Maintaining reasonable cash reserves represents good stewardship. Cash reserve policy helps with preparing for contingencies. Banks may also require the church to maintain a debt reserve fund that can help make payments during a period of tight cash flow.

Wedding and Funeral Policies

Canada Revenue Agency does not allow fee differentiation for members and non-members. A church wedding is a service of worship. A church may decide on a policy that adheres to its doctrinal statement.

Financial Policies

Executive leadership should look at developing written policies that cover:

- Financial procedures and controls.
- Debt Policy.

- Benevolence Policy.
- Anti-money laundering.
- Compensation Policy.

To help prevent fraud and as part of better financial planning, executive leadership should also look at the following:

- Bank reconciliation and monthly financial statements,
- Church receipting process,
- Maintaining direction and control of foreign charitable activities,
- Fundraising regulation,
- Fraud prevention,
- Ethical investment,
- Insurance,
- Cash handling and transit,
- Expenditure/ bank cards,
- Claiming of expenses,
- Capital equipment replacement,
- Suppliers and contractors,
- Financial Reporting, and
- Annual Audit and filing (T3010 in Canada).

Two: Church Budget

There is no single approach to church budgeting. Many variables determine the church budget:

- Size of the church.
- The generosity of its attendees.
- Governance and denominational guidelines.
- Senior Pastor's vision and philosophy of ministry.
- Staff structure (paid or volunteer).

- Mission giving commitment.
- Church mortgage and building maintenance cost.

Many executive leaders do not think about cash reserves needed to manage contingencies. Church roof, church parking, replacement of heating, ventilation, air conditioning (HVAC), and audiovisual equipment used by the Tech ministries are expensive line items. Without a cash reserve policy to fund such expenses, church leadership may struggle in the long term.

Churches don't have unlimited funds. High personnel costs or church mortgages are two expense line items that will create financial pressure. To manage contingencies better, executive leadership should keep an eye on the following budget framework:

1. Personnel Cost: 45% to 55%
2. Ministry Expense: 25%
3. Mission Support: 10%
4. Administrative & Capital Expense: 10%
5. Mortgage (Facility Expense) or
Cash Reserves: 5% to 10%

Projected income and spending priority determine the church budget. Executive leadership provide goal clarity for the next twelve months. Revenue and attendance do not increase indefinitely.

If the personnel cost is between 45% to 50% of the budget, leadership can allocate funds to other line items. If the church mortgage is more than 2.5X the total revenue, the interest on the mortgage will eat into operating expenses. The higher the mortgage, the greater the mortgage payment is going to be.

Example:

Total church revenue is \$2 million.

Church mortgage is \$6 million (more than 2.5X).

Zero-based budgeting brings all program budgets down to \$0 and zero-budget allotment for the following year. Ministry expenses will have to be cut if personnel cost and mortgage expenses are out of control.

- **Step One:** Take a look at your church size, revenue, mortgage, and personnel cost.
- **Step Two:** Set aside funds for mission support and evangelism.
- **Step Three:** Project facilities and equipment expenses incurred in the next one to three years.
- **Step Four:** Cut expenses without being hard on direct ministry expenses.

Depending on your growth phase, the church in the Expansion Phase will face the extra pressure of needing a larger building and parking area. A church mortgage is the enemy of cash reserves. Personnel costs are the enemy of ministry expenses. The executive leadership will have to pay attention to these areas.

Executive leadership should provide healthy church guidelines that cover:

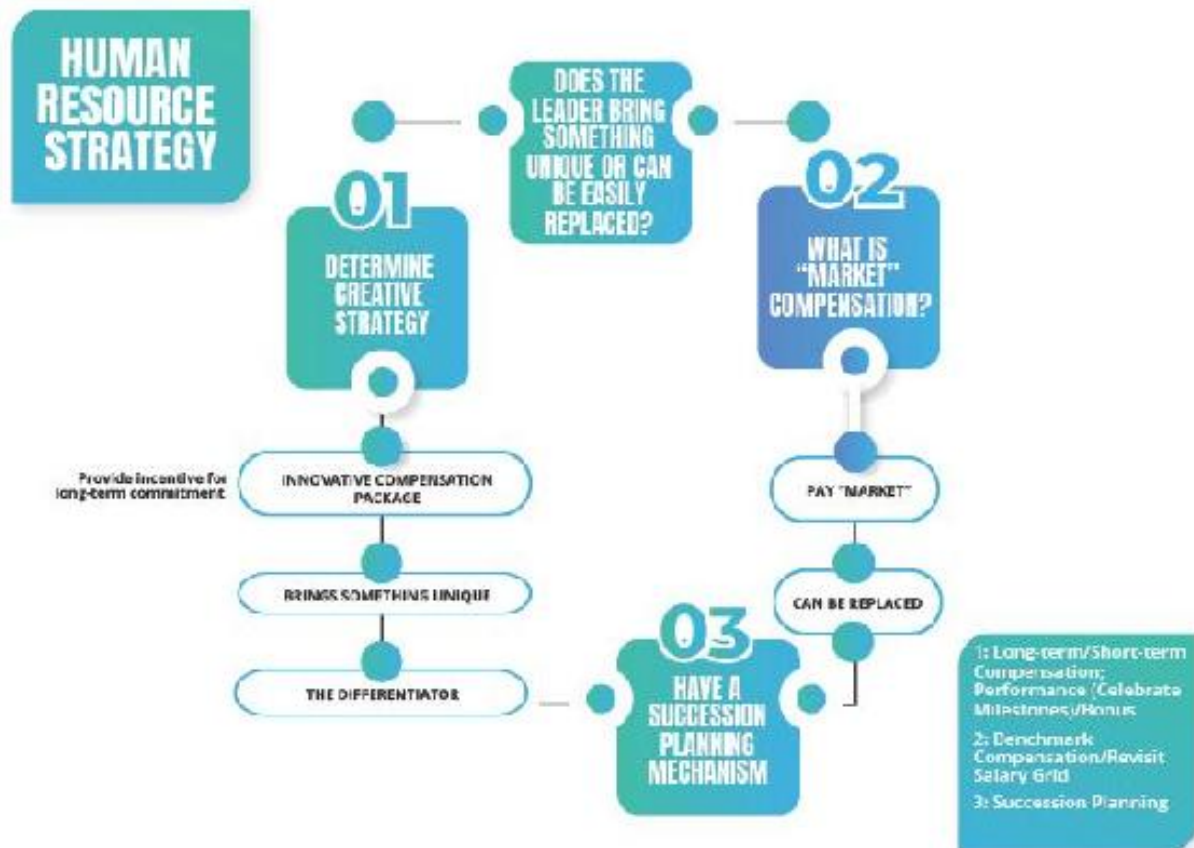
- Percentage of the revenue earmarked for Mission giving.
- Cash reserves guidelines.
- Acceptable mortgage debt (loan policy).

Three: Church Compensation Strategy & Church Roles

Executive leadership needs to review and revisit the church compensation policy regularly. There are four things to consider:

1. **Determine Creative Strategy** – Long-term and short-term compensation. How will you monitor performance, celebrate milestones, and offer a bonus? How will you provide an incentive for a long-term commitment?
2. **Understand “market” compensation** – Regularly benchmark compensation and revisit the pay structure and pay grade/salary range for different job descriptions.
3. **Understand your church culture** – What is the desired church culture? How do staff members feel respected and appreciated?

4. **Have a suitable succession planning mechanism** – When you pay less than the “market,” you run the risk of losing good people to the “market.” If you are looking at attracting the right talent and maintaining a high retention rate, you will have to look at the compensation strategy.



As you start to embrace technology and automation, you will have to be clear about the skillset needed:

- Fully-in house.
- Partly outsourced.
- Fully outsourced.
- Volunteer driven.

Churches of all sizes will have to utilize volunteers. Outsourcing certain functions like Webmaster or Information Technology (I.T.) is not uncommon.

A Start-up church budget (0 to 100 people) may have nothing earmarked to pay staff. Many Pastors work a second job as churches are not able to pay their salary. There are other start-up churches where 100% of the budget goes to the Pastor as the church has no building and other expenses. Churches may have an annual budget of \$100,000 to \$125,000 and a salary as high as 80 percent of the budget.

During the Ramp-up phase (300 to 800 people), one full-time staff for every 75 people in attendance may be something that the church can afford. Churches in the Ramp-up phase will have a Senior Pastor, Worship Pastor, Student Pastor, Children's Pastor, and Administrator.

The size of the church or church giving will vary based on the church's location and the generosity of the people. Healthy churches aim to spend less than 50 percent of the budget on staff compensation. During the Expansion Phase, tension is felt between salaries, ministry expenses, and a mortgage to cover the cost of a larger building or parking area requirements. Once capital expansion and the mortgage payment are complete, larger churches may see salary costs below 45% due to standardization, automation, and optimization.

Total compensation covers both salary and benefits. The federal government requires certain benefits to be available to employees. There is a wide array of benefits offered to church staff:

- Vacation time/pay, sick time, personal days, Maternity/Parental leave.
- Pension Plan/Retirement Fund – 401(k) in the USA, RRSP in Canada.
- Housing/Parsonage.
- Medical Health and Dental Plan.
- Health Spending Account/Health Club Membership.
- Automobile Allowance.
- Life and Disability Insurance.
- Continuing Education Allowance.
- Conference Expenses.

- Office Cafeteria/Refreshments.
- Professional Expenses/Tuition assistance.
- Travel Allowance/Mileage Reimbursement.
- Counseling services.
- Relocation allowance.
- Reimbursement for cell phone and personal data plans.
- Sabbatical Leave.

Compensation, Job Grading, and Church Roles

Church pay varies based on church attendance, total revenue and budget, rate of church growth, and church location. Cost of living is dependent on the setting – farming area, small town, or a city. Ordained and non-ordained staff is compensated differently in church settings. Responsibilities, both supervisory/non-supervisory, and level of education are also factors in determining pay grades.

Broad-banded Pay Structure:

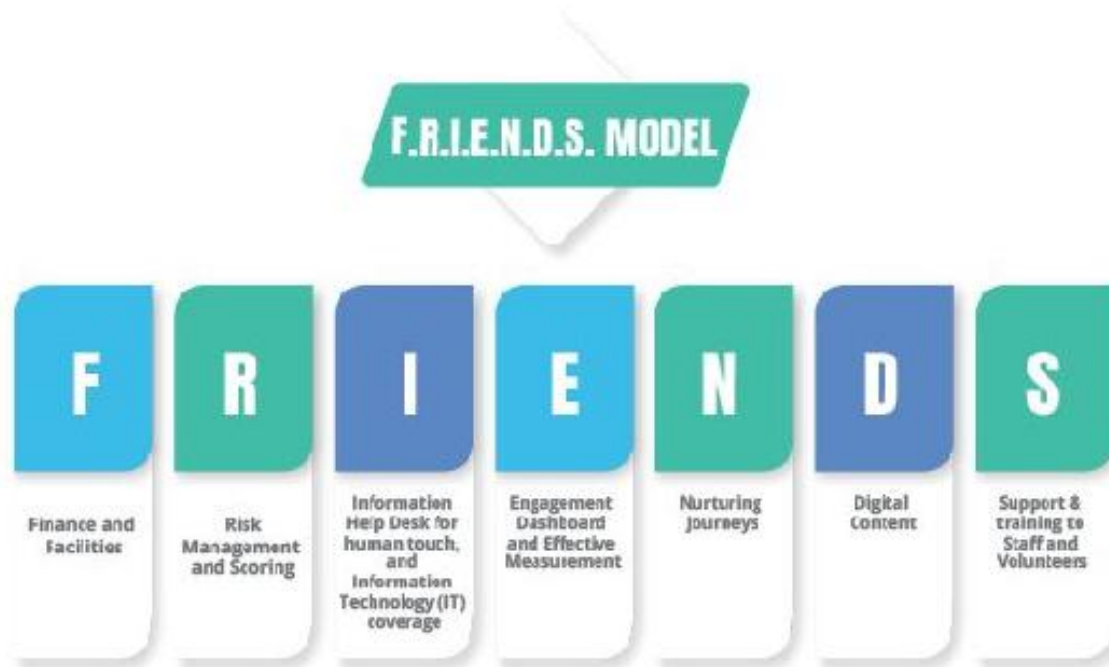
A few pay grades based on a broad salary range can build the church's compensation structure. Executive-level leadership positions may still be based on individual pay ranges based on these key church roles and influenced by market rates.

The salary range is divided for each salary band, covering a cluster of job roles into minimum, midpoint, and maximum salary ranges. You can follow a 25 percent deviation from the mean to both minimum and maximum salaries. New hires typically start from the minimum of a salary range. It allows room for growth with an annual salary increase.

“Ask Amitabh” Salary Report: Leadership should review the compensation policy regularly to make sure that the pay scale is never outdated. You can reach out to me on my website to request a copy of the Ask Amitabh Salary Report. This report will help you decide how many full-time staff members you can hire during different phases of church growth.

3. Human Resources 1-2-3

One: F.R.I.E.N.D.S. Skillset



F = Finance, Facilities (on-site), and Findability (online)

Finance:

- Accounting,
- Payroll and benefits,
- Giving, expenses, and purchases,
- Budget,
- Audit,
- Financial reports,

- Vacation approvals and tracking, and
- Document retention.

Facilities (on-site): Facility booking, security, emergency preparedness, assets, and maintenance.

Findability (online): Who is responsible for designing the layout that makes it easy for visitors to find information on your website? The information architecture and usability help improve church visibility on Google, YouTube, social networks, and web pages. You want to increase efficiency and create a frictionless online experience.

R = Risk management and scoring

How is risk assessed at your church? What are the monitoring and controls that are in place? How is the risk scoring dashboard available to the senior leadership of your church?

Risk assessment and risk scoring system are needed as the church protects itself by monitoring:

- Information Technology (I.T.), cybersecurity, and ransomware.
- Legal matters and insurance.
- Media waivers, parental consent, and short term mission teams' liability.
- Abuse prevention, volunteer background checks, and communication with minors.
- Facility policy, fire safety, lockdown, emergency preparedness, accessibility, Joint Health and Safety Committee (JHSC).
- Privacy policy, CASL, PIPEDA, California Consumer Privacy (CPRA), COPPA (1998), and GDPR compliance.
- Document purging and retention - archiving documents, naming conventions, O.C.R. scanning.

As the church gets bigger, the Senior Pastor needs to be aware of risks without being pulled into all the details and risk management discussions. Risk scoring to understand and manage compliance is necessary.

I = Info HelpDesk to provide a human touchpoint for external visitors and leads.

How are you connecting and engaging with people?

Multi-generation marketing has changed the way we communicate. Information is available through a variety of means. We have moved from print to digital, radio to television, and word of mouth to social networks. An Info HelpDesk plays an integral part while moving away from traditional print materials, radio news, and face-to-face conversations towards digital, videos, and online content.

Here is a general rule that you should follow while introducing automation:

Automate transactions but don't automate human touchpoints.

Providing an option of genuine human connections ensures that the church does not become impersonal as it grows. Automation needs to be balanced with human contact and needs to reach across five generations. Great leaders will explore practical ways to connect with all ages.

As the church grows, I suggest using a HelpDesk model. The advantage of having an Info HelpDesk, an I.T. HelpDesk, and a Support HelpDesk is that nothing gets delayed or interrupted because a staff member is on vacation or sick leave. Team members cover for each other.

E = Engagement Dashboard and Effective Measurement

Who is responsible for non-financial measurements at your church?

A good Customer Relationship Management (CRM) system will help provide easy access to reports and dashboards generated. Church leaders have to stay on top of engagement journeys, annual surveys, exit surveys, social media analytics, Google analytics, search engine optimization (SEO) keywords, and various Google Ads campaign (SEM).

Leaders should not ignore data around lead conversion, retention rates, and engagement dashboards. You don't need to have a full-time data visualization person to run reports. When you select the best CRM, you can track some of this information in real-time using live reports and dashboards.

N = Nurturing Journeys

Who is responsible for omnichannel communication and nurturing journeys on your team?

The privacy and preferred method of communication of every contact who permits you to communicate with them must be respected and must follow local and global anti-spam legislation. Your CRM helps you to connect with individuals on the platform they prefer. Automation and A.I. can help you to move from one channel to another seamlessly. It is now possible to create nurturing journeys through email campaigns, SMS messaging, chatbots, social networks, and Apps. Remember to keep your audience in mind, engage effectively with different age groups, and track all campaigns and their journeys.

D = Digital Content

Who is leading your digital content management?

It's essential to focus on how your content, such as graphics, images, videos, descriptions, and hashtags attracts and engages people. We have moved away from traditional to viral communication. Content is now both online and offline. Social networks have changed the landscape. Therefore, you will need to take a look at the strengths and weaknesses of digital content management.

Your digital content management plan should include:

- A marketing plan.
- Online attractions.
- Social network, SEO, Search Engine Marketing (SEM), hashtags.
- Findability: Making it easy to get anywhere, anytime.
- Clarity: Making it easy to understand. Clear Call to Action (CTA).
- Simplicity: Less is more. Streamlining your service and product.
- Descriptions: Utilize keywords and hashtags to improve your SEO ratings.
- Speed: Helping your visitor to save time.
- Visual aids: Images and videos.
- Style and Beauty. It needs to be pleasing to the eye.

S = Support HelpDesk

How is your church managing its internal team members (staff and volunteers)?

How are internal requirements being collected and communicated? How is internal training reducing dependence on external consultants for ongoing operations?

Emails are not for project management and team collaboration. If your email inbox receives hundreds of emails, it is time to change event management at your church. You also need to address the requirements of internal staff and volunteers.

Consider utilizing a Support HelpDesk to move your team away from email communication to a team collaboration platform. A Support HelpDesk can help with:

- Managing change and training.
- Helping volunteers and staff members.
- Covering staff or volunteer onboarding, Cybersecurity, and other critical training needs.

A Support HelpDesk is a link between the back-end process and front-end people and tasks. You need this bridge between strategy, planning, and execution.

Two: Jigsaw Developmental Model

Elliot Aronson, professor of social psychology at the University of California, presents us with the “The Jigsaw Classroom” model.¹⁰ Each student is divided into five or six specific parts and is an individual contributor. They assist each other in becoming experts. With the fast change in technology, churches are facing critical projects that require learning. Not every F.R.I.E.N.D.S. skillset will be able to manage the pace of change. We no longer operate as laid out in an organizational chart. We work better in teams. Team-based organizational structures are disrupting traditional organizational charts.

The Jigsaw model is where different members of the team assist each other while collectively becoming experts. Influential churches embrace the jigsaw team approach. The skillset that got you to the Ramp-up Phase is inadequate in the Expansion Phase. The skillset will have to change as the church grows. Not every church leader will be able to ask the team to change. Deciding to change the team will be even more difficult. Learning and growth perspective at the church will have to focus on how to achieve the church vision. How will the church sustain an ability to change and improve?

Executive leadership should always be aware of different jobs in the church that are likely to be vacant soon and plan accordingly by identifying who could fill these vacancies. The Executive Pastor should develop a cross-functional training program to cover for one another. Team members trained as primary task owners and someone trained as a secondary to cover the main functions when necessary. It is an ongoing training process and an essential requirement to ensure a smooth transition during staff absence. It's also an excellent way for staff to appreciate each other's role on the team.

Human resource planning needs to look into five areas:

- 1. Identify present needs.**

Align church programs, services, and human resources with church strategy.

- 2. Identify present gaps.**

The administrative team and Pastors with different skills need to fit into the "The Jigsaw F.R.I.E.N.D.S." model.

- 3. Talent developmental strategy.**

Team members should serve as primary and secondary team members to cover all the main functions. It is helpful during the absence of a team member or when someone retires. Ongoing staff training covers skill gaps based on automation tools. Training time for learning a new toolset will have to be part of the change strategy.

- 4. Anticipate the future state.**

Leadership has to anticipate the possibility of significant disruption in the next three years due to changes in technology, retirement or

loss of staff. Succession planning is needed to avoid confusion, conflict, and miscommunication during challenging transition periods.

5. Create a roadmap for the future.

Leadership needs to plan for the future. If you are climbing Mount Everest, the team needs a few Sherpa guides on the team. If you are climbing Mount Kilimanjaro, the equipment and team requirements are entirely different. Planning and preparation always take place around processes, change after automation, identifying talents, and pinpointing gaps. The developmental model needs to be part of a regular executive exercise.

Three: Human Resource & Safeguarding Policy

Human Resource policies are the framework that helps in interpreting and making decisions. Shared values, codes of conduct, and ethical standards are set up and communicated. Clear communication, treating everyone fairly, and establishing clear guidelines allow every church staff member to feel well cared for and protected.

Here are ten essential areas that the executive leadership should look at:

1. Equal Opportunities and Staff Employment

Churches, as employers, have to be aware of the local, state, and federal laws. A church's legal responsibility to employees covers employment law topics regarding employee selection, discrimination law, immigration laws, workers compensation, fair labor standards, and termination requirements. As an equal opportunity employer, church leadership will have to consider its non-discrimination employment policy based on age, sex, color, race, national origin, or disability that does not impact performance at work.

Equal opportunities and staff employment should address:

- Recruitment and immigration compliance.
- Staff selection procedures.
- Bullying and harassment.
- Whistle-blowing.

- Confidentiality.
- Contracts of employment pro forma.

Executive leadership of the church should be mindful of employment laws. Richard Hammer, author of over 100 books, including four-volume *Pastor, Church & Law*, annual resources *Church & Clergy Tax Guide*, and *The Compensation Handbook for Church Staff*, is a good resource. Richard, an attorney, and certified public accountant, also offers resources online at www.churchlawandtax.com

2. Employment-Related Records

The church as an employer maintains employment-related records. We need to be familiar with employment standards, the occupational health and safety act, privacy legislation, like Personal Information Protection and Electronic Documents Act (“PIPEDA”) in Canada, as we manage employment-related document retention.

A job description is an essential document as it helps with formulating job postings and interview questions. Church staff and volunteers should sign Statement of Faith and Lifestyle Agreement. Due to changing Human Rights Legislation, executive leadership should not take this process lightly. Praying, preaching, Christian teaching and values, maintaining a relationship with other Christian agencies, and serving the needs of a spiritual community who are part of church membership is what a church staff does. Churches should describe faith-based responsibilities in their job descriptions. It should include church-related qualifications, behavioral skills, and ethical/morality standards. They serve as a point of reference for new employee orientation and to outline discipline policies.

The recruitment exercise covers resumes, references, job descriptions, interview notes, an employment agreement. Police background checks, salary records, clergy residence deductions, performance reviews, mandatory training, and documents based on church discipline policies may also become part of employment-related records. In Canada, staff members can request to look at their employment records.

The employment agreement, along with the job description, must be within the boundaries of the Employment Standard Legislation. A job offer

accepted in writing by both the employer and an employee becomes an employment contract. Before starting work at the church, a new employee should sign this employment agreement. It is good to have the church employment agreement template, along with a termination clause, reviewed by legal counsel from time to time to ensure that it is an enforceable contract.

In case of a termination interview, employment records will cover the termination letter, record of employment, a signed copy of the settlement offer, benefits transfer, and release.

Documents related to the exit checklist and exit interview will also become a part of employment-related records.

3. Employment Handbook

A church employee handbook is a work in progress document. As the church moves from the Start-up Phase and Ramp-up Phase to the Maturity Phase and Expansion Phase, church procedures related to employees may also change. Federal and state laws are also not static. It is good to review the employee handbook once a year to keep workplace policies, procedures, and practices up-to-date.

It is essential to communicate all policies and related training to church employees. It is not uncommon to clarify a written policy based on a workplace incident. An Employee Handbook or staff onboarding should cover the following:

- Types of Employees.
- Probation periods.
- Vacation.
- Retirement, leave, sick leave, and overtime.
- Study leave and sabbaticals.
- Maternity, paternity, adoption, bereavement leave.
- Short-term and long-term disability.
- Pay/stipends/remunerations.
- Employee Benefit and Insurance.
- Pensions.

- Claiming of expenses.
- Staff loans.
- Staff management and appraisal.
- Performance Management.
- Development and Training.
- Induction Training and Exit Interviews.
- Complaints and Grievances.
- Employee Corrective Action.
- Organizational rules.
- Dress code, punctuality, and code of conduct.
- Working from Home and Flexible Working.
- Important Notices, Policies & Procedures.
- Confidentiality Agreement.
- Lifestyle Agreement.
- Health & Safety.
 - Use of equipment.
 - Office Security & Phone System.
 - Cybersecurity.
- Emergency Preparedness (Fire, Medical, & Lockdown).
- Accessibility Policy.
- Document Retention Policy.
- Communication with Minors.
- Social Media Policy and blog policy for staff.
- Copyright issues.
- Safeguarding Policy – Children, Youth, Adult, Staff, & Volunteers.
- Copyright issues.
- Whistleblower Policy.
- Conflict of Interest.
- Privacy Policy.

4. Onboarding and Staff Training

Executive leadership should focus on team building, coaching, training, mentoring, and organizational development. One of the four categories of Kaplan & Norton's Balanced Scorecard is about "*Learning & Growth Perspective: To achieve our vision, how will we sustain our ability to change and improve?*" A Support HelpDesk would implement training and an apprenticeship model that trains others to assume higher levels of responsibility.

Ongoing training covers cybersecurity, health & safety requirements, fire safety, and lockdown process. A church's developmental focus should look at job shadowing, job rotation, apprenticeship, and training as ways to onboard and train staff members. Team members should be able to cover primary and secondary team members to perform various functions. Executive leadership should plan for the future by developing a strategy for all critical responsibilities of senior management positions. Performance reviews should include an individual development plan.

5. Performance Review

A performance review is a relational exercise involving feedback, debrief, and encouragement. Training around the performance review process is needed to make this a healthy practice. Clarity around criteria to evaluate performance is ideal.

Author Patrick Lencioni identifies four kinds of values ¹¹.

- Core values: These are essential values that we fight to keep.
- Behavioral values: These are values that guide how team members act.
- Aspirational values: These values are what we hope to embody.
- Accidental values: These are part of our culture that crept in without us noticing.

Performance reviews are an excellent way to demonstrate accountability to the church's mission, vision, and values. For it to be an effective tool, it requires a well-designed assessment and tracking tool. Training supervisors help in providing better feedback and coaching. Individual development

and improvement plans are part of the organizational culture. Grooming high-performing staff members for a critical role is an ongoing process. Executive leadership should think of how to link performance with pay as part of the compensation strategy.

Careful documentation of performance reviews facilitates the church to utilize this tool as part of its discipline process. Legal counsel can help include a termination clause in the employment agreement. The church should treat any employee who is going through a disciplinary process with dignity and respect. Church leadership should make sure that the process around performance review, coaching, and counseling is in place so that a person not performing is well communicated.

Performance feedback can help all employees to track their performance and track their conformity to the church culture. Poorly executed or an unclear performance review is worse than no performance review. Without timely and ongoing feedback, the review can quickly turn into an exercise that is neither motivational nor part of real-time performance feedback.

6. Employee Exit Checklist and Exit Interview

When an employee is leaving voluntarily, an exit interview is a good practice for gathering information that can help the leadership understand areas of improvement. An Employee Exit Checklist and Exit Interview are essential components for managing positive church employee relations and experiences. Both onboarding and offboarding of church employees should be a planned and intentional exercise.

Churches should have a consistent practice for termination meetings to reduce the risk of liability. As a general rule, rushing the signing process of a termination with a settlement offer should be avoided. Leaders should carry out termination meetings properly to make them legally effective.

7. Volunteer Management

Churches of all sizes need volunteers. Volunteers working with children and youth require a background check. The church should provide an easy sign-up process and automate volunteer recruitment, communication, training, scheduling, compliance, and annual renewal of volunteers.

Church leadership will have to consider:

- How will the church utilize volunteers?
- Code of conduct that volunteers need to follow.
- Volunteer contracts/expectations/agreements
– Value Agreements.
- Church support for volunteers, training, recognition, and appreciation.
- Safety and well-being of all volunteers.

Effective volunteer management is vital for church growth. It is also a fantastic way to connect with those who are attending your church.

8. Safeguarding Policy

Churches provide a variety of services for children, youth, and vulnerable adults. Executive leadership needs to ensure that no one experiences abuse of any kind. Churches need to be committed to protecting and safeguarding the welfare of the vulnerable sector by committing to a practice that protects them. It should cover:

- General guidance/ code of behavior,
- Pastoral care,
- Recognizing signs of abuse,
- Safer recruitment,
- Management of church staff,
- Management of offenders,
- The allegation against people in a position of trusts such as board, staff, or volunteers,
- Working in partnerships,
- Domestic abuse,
- Handling of disclosure information,
- Transport use,
- Safety & security on Short-Term Mission trips/overseas travel, and
- Document retention.

9. Child Protection Policy

The purpose of this policy is to protect children. This policy needs to guide all staff with clear and practical advice on working with children that minimizes the risk of allegations against volunteers or staff members. This policy needs to be further supported by procedures that should cover:

- Physical contact,
- Written contact – communication with minors,
- Online issues,
- Discipline,
- Children with special needs,
- Inappropriate behavior,
- Procedures to follow,
- Registration forms and liability waivers, and
- Training.

10. Adults at Risk Policy

A church leader should be committed to preventing and reporting concerns about abuse, neglect, and ill-treatment of adults at risk of being harmed.

- Definitions,
- Staff integrity,
- Procedures to follow,
- Discipline,
- Registration forms and liability waivers, and
- Training.

Anyone employed at the church or volunteers working on behalf of the church, regardless of the type or amount of contact they have with adults at risk of abuse, has a role to play in safeguarding and protecting vulnerable adults. They must know how to recognize potential abuse of adults at risk. They should also know what to do when safeguarding concerns arise. The

training of volunteers and staff should help understand what the church expects from their behavior and actions.

4. Church Policy 1-2-3

Church leaders need to have a comprehensive understanding of how to operate as a legal entity. Churches have to work within the confines of the law, church bylaws, and denominational guidelines. The church board and members introduce resolutions and approve written policies. They provide operational policies based on core values, leases, partnerships, joint ministry agreements, legal and lifestyle agreements.

One: Church Policy – Facilities

Churches can decide to rent their room or facility to outsiders. Church leadership should review liability, insurance, and legal issues before considering the same. A facility or room hire policy sets out who can rent space, what activities, and who can approve renting the church facility.

A church can permit another church or not-for-profit organization to rent its facility. A church can choose a closed-door policy and use the facility for its purpose only. On the other hand, a church can choose an open door policy and open it to public legal activity. It is essential to treat all renters, members and non-members, the same.

The church facility policy should cover renting facilities to outside groups. It needs to manage risks and provide insurance coverage. Agreements around alcohol on church premises, use of church kitchen, and other procedures to mitigate all risks need to be in place.

Church facility policy should refer to the established moral standards such as lifestyle agreements that are in place. Church leadership should include Biblical and theological perspectives on marriage. The purpose of the church should be available to the potential renter. Questions about the renter and activities to be carried out are part of the facility rental process. The church board can give the church activities priority over any rental activities. Pastors should be involved in the approval process.

As part of the risk management strategy, renters should provide proper insurance coverage. Clear policies preventing the use of alcohol or

abuse prevention can be listed.

The facility policy, rental agreement, rental fee, insurance coverage, and risk mitigation process need regular review to keep it up-to-date.

To manage the risk, you will have to take a look at the following:

Food Hygiene Policy

- Church Kitchen procedure and safety,
- Food hygiene and preparation,
- Food allergies,
- Cleaning routines,
- Use of kitchen equipment, and
- Training required for kitchen access.

Fire Safety Policy

- Evacuation procedure/ fire exits,
- Fire call and extinguisher points,
- Fire drill - Staff/volunteers, and
- Fire safety annual audit.

Lockdown Policy and Procedure

- Lockdown procedure for threat outside and inside the building,
- Communication system and equipment, in-ear monitors, and securing of the building,
- Security system and monitoring cameras,
- Lockdown training, and
- Lockdown annual audit.

Health and Safety Policy

- Organization and responsibilities,
- Accidents and first aid,
- Electrical safety,

- Gas equipment safety,
- Asbestos and hazardous substances/buildings,
- Plant, machinery, equipment,
- Slips, trips, and falls,
- Lighting,
- Working at heights,
- Manual handling,
- Contractors on site,
- Bouncy castles and play equipment,
- Church grounds/ graveyards,
- Church bells,
- Church parking, landscape, and snow removal,
- Defibrillator,
- Pest Control,
- Waste management,
- Legionella control (hot and cold water system),
- HVAC System,
- Roof management,
- Custodian coverage and training,
- Accessibility policy,
- Joint Health & Safety Committee (in Canada), and
- Environmental/green/eco policy.

Two: Church Policy – Marketing

In the last decade, marketing has shifted. Brands have been experimenting with physical marketing. Retailers have been trying to *create a better experience between human touchpoints and digital connections*.

Church 4.0 thrives on physical integrity and a blended customer experience, both physical and digital. The one-on-one contextual experience needs to be authentic, genuine, and sincere.

Technology will keep changing the way business is done. *Church leadership has to now look at:*

- Means of communication used: Email, texting, chatbot, and social media,
- iChurch Online, copyright, and CCLI licenses for streaming songs/music,
- Photographs and images used,
- Media waiver and approved images,
- Confidentiality and permission to use the photograph and video taken during a church service, and
- Website and App

Social media and communication policy needs to be reviewed:

- Social media policy,
- Social media group etiquette,
- Facebook Group or Room Etiquette,
- Communication policy,
- Communicating in a crisis,
- Communicating with minors,
- Contacts with the media,
- Communication style guide, and
- Reputation management: How to manage negative comments and complaints.

Three: Church Policy – Information Technology (I.T.) and others

Churches are often budget-strapped. Church leaders do not take into account the cost of using technology. You are fortunate if someone on your staff or a high potential volunteer can guide you on Information Technology (I.T.). For those less blessed, even an outsourced I.T. consultant offering services at a fixed dollar per hour can be a dent in your budget.

I.T. team needs to cover security, data privacy, and data integrity. Church leaders will have to look at:

- Privacy Policy – A privacy policy is essential under PIPEDA, CASL, California Consumer Privacy (CPRA), and COPPA (1998),
- Online iChurch and GDPR requirements,
- Rights to erasure requests procedure (audit trail in case of GDPR, etc.),
- Subject access requests procedure,
- Best practices for handling confidential information,
- Data Protection Policy,
- Website Cookies Policy,
- Data breaches procedure, and breach of personal information communication,
- Cybersecurity: Security of data
 - Monitor of Anomalous Behavior: Increased remote work means relying on cloud services like Microsoft Office 365 and CRM. Church data is compromised if a hacker can get into your CRM, Office 365 accounts, SharePoint, or OneDrive.
 - Threat alert system and the skillset available in the church to address this urgently.
 - The church is monitoring a dashboard view that provide visibility of threats.
 - What is the restoration time? Knowledge of business downtime if any of the platforms or data goes down.
 - The church should provide regular cybersecurity awareness training for all church staff and essential volunteers. It creates an environment of detection, monitoring, and response to cyber threats. For complimentary resources on cybersecurity training, check www.amitabhsingh.com.
 - Annual Review: Is your skillset or outsourced Information Technology team trained and equipped to manage these

threats?

Other Church Policies:

The list of church policies is long and goes beyond finance, employment, compensation, privacy, benevolence, and social media.

Some of the other policies and procedures that church leaders may need to look at are as follows:

- Hospitality,
- Global Missions,
- Short-Term Missions Trip,
- Pastoral Care,
- Small Groups,
- Church Office,
- Pre-School Operations,
- Café/bookshop/business management,
- Work with non-charitable or for-profit organizations,
- Political Involvement – Dos and Don'ts for the church during the local or federal elections,
- Clergy Communication Privilege,
- Trademarks and Copyright Law, and
- Winding up a church or charity.

As you work your way through some of these, it is wise to seek legal counsel as and when necessary.

5. Risk Management 1-2-3

Church leadership needs to cover risk management. Is your church ready and financially protected if any of the following events should occur?

- Church building damaged by fire,
- An attendee hurt on your property,
- An employee steals office equipment,
- The church treasurer embezzles a large sum of money,
- A church employee hurt on the job,
- The church office burglarized,
- A car drives through your front doors,
- Lockdown procedure, and
- Emergency leadership planning (if a Senior Pastor dies or is incapacitated).

One: Risk Appetite: Removing, Decreasing, Accepting & Managing

Removing Risk

Church leadership needs to eliminate the risk of injuries and liability.

Example:

- Church staff using inferior materials or unsafe equipment.
- Hazardous walkways.
- Slippery surfaces.
- Faulty wiring or exposed steam pipes.
- Broken stairs.

Decreasing Risk

Church leadership should look at areas that can lower risk.

Example:

- Use of safety ladders with guardrails on either side.
- Hallways are kept free of obstacles.
- Walkways are clear of electrical cords.
- Building security systems and access to the building.
- Equipment inventory and protection of computer and other capital assets.
- Fire safety.
- Lockdown process.
- Training of staff and volunteers to raise awareness of these measures.

Accepting Risk

Given the high replacement costs and large amounts of some judgment claims, a church should accept the cost of insurance coverage. The higher the deductible, the lower the premium. When a minor incident occurs, you may consider paying for the damages to avoid a premium increase.

Managing Risk

Purchasing insurance coverage ensures that the payment of premiums and deductibles transfers the risk to the insurance provider. Church leadership should keep in mind that gross negligence and violation of health and safety standards cause your insurance company to cancel your church insurance policy.

Types of Insurance:

Fire Insurance

The fire insurance policy covers the building, property, and equipment. It would be best to look at your insurance policy to determine contingencies that your policy covers. You might have to pay an additional fee to get insurance coverage for different types of losses. Church leadership needs to be mindful of activities that should not be allowed inside the building. For example, renting to outside groups without insurance coverage or negligent acts by the renters could void your insurance coverage.

Liability Insurance

Church leaders are responsible for the safety of those who attend church, their volunteers, and their staff. A liability policy covers loss from bodily injury, property damage, medical expenses, and legal fees. Take note of the fine print to be aware of limitations in your insurance policy.

Automobile Insurance

All vehicles owned by the church require automobile insurance. Automobile policy covers bodily injury claims, property damage claims, medical expenses, uninsured motorist damages, damage to your vehicles, and towing costs.

Church Insurance Checklist:

Type of Insurance	Purchase	Insurance (Expiry Date)	Do Not Purchase
Property Insurance			
Fire Insurance			
Windstorm			
Hail			
Smoke			
Explosion			
Vandalism			
Water damage			
Glass			
Automobile Insurance			
Liability Insurance			
Worker's Compensation			
Business Interruption			
Theft			
Church Staff Short Term Disability			
Church Staff Long Term Disability			

Two: Removing Blind Spots – Risk Assessments

In 1955, Psychologists Joseph Luft and Harrington Ingham designed the Johari window technique.

Box 1: Open area or Free area – what you know about yourself and known to others.

Box 2: Blind area – unknown to you but known to others

Box 3: Hidden area – what you know but others do not know.

Box 4: Unknown area – what is unknown to both you and others.



When it comes to risk management, carrying out regular risk assessment helps the church leadership move from an unknown, hidden, and blind area to an open and free area. Your mindset towards risk matters. A Risk

Management checklist helps with regular assessment. Removing blind spots can help you determine whether you need to remove, decrease, accept or better manage your risks.

Church Risk Management should cover:

- Event use of facilities and the kitchen,
- Church cleaning and maintenance,
- Security,
- Emergency Preparedness, fire safety, medical emergencies, lockdown, terrorist attack,
- Protection of children, youth, and vulnerable adults,
- Car parking,
- Church vehicles,
- Traveling on church business,
- Cemetery,
- Governance and compliance
- Finance management,
- Data Integrity and I.T., and
- Legal and document retention.

Three: Risk Scoring & Compliance

How is risk assessed at the church? What needs monitoring? What controls are in place? How is the risk scoring dashboard available to the executive leadership of your church?

In a Start-up Phase or Ramp-up Phase, the Senior Pastor is involved in every discussion. As the church reaches the Maturity Phase and Expansion Phase, the administrative team should keep the Senior Pastor informed of significant issues.

To use an aerospace analogy, executive leadership needs a Risk Scoring System as part of your risk assessment and management.

Risk Scoring System: 1 to 9

A Higher Score = Greater Risk or Non-Compliance

Risk Score	Compliance	Who Is Informed
One	Tasks/Internal audit is happening on scheduled timelines	Supervisor Level
Two	Tasks completed with a delay	Administrator Level
Three	Task stuck – Non-Compliance	Executive Leadership Level
Four	Procedures/Internal audit is happening on scheduled timelines	Supervisor Level
Five	Procedures/Internal audit completed with a delay	Executive Leadership Level
Six	Procedures/Internal audit stuck – Non-Compliance	Senior Pastor level
Seven	Policy – Review is happening annually	Executive Leadership Level
Eight	Policy – Delayed. Needs attention	Senior Pastor Level
Nine	Policy – Non-Compliance	Senior Pastor & Board

Let's start from the bottom up:

10,000 feet: Micro

20,000 feet: Mini

30,000 feet: Macro-Low

40,000 feet: Macro-Medium

50,000 feet: Macro-High

Micro - Procedures & Internal Audits on scheduled timelines: Score 1, 4 or 7

- A Senior Pastor should be aware of procedural timelines and any delay in completing a project.
- Micro procedures and internal audit does not need a Senior Pastor's input as long as timelines are maintained.
- The Executive Pastor should address micro procedures and audit delays within a reasonable period.

- The Risk Score gets increased when a micro procedure or an internal audit is stuck or not being carried out. Non-compliance should not be hidden from a Senior Pastor, and they should be brought into the discussion.

Mezzo – Delay In Compliance: Score 2, 5, or 8

- A Senior Pastor should be aware of timelines and delays in completing an internal audit or compliance issues.
- Mezzo procedures and internal audit delays do not need a Senior Pastor's input as long the administrative team can address it within 30 days.
- If a Mezzo procedure or an internal audit is stuck and cannot be completed, the risk score must be increased as the Senior Pastor is brought into the discussion. Non-compliance cannot be hidden from a Senior Pastor.

Macro (Low, Medium, and High) - Policies & Non-Compliance: 3, 6, or 9

- A Senior Pastor should be informed of all macro policies and internal audit non-compliance.
- Live reports and dashboards need to be available for Senior Pastor to review at any time.
- Executive Pastor should bring delays in macro policies, internal audits, and compliance to the Senior Pastor's attention for immediate resolution.
- A Senior Pastor is required to report to the church board about non-compliance or policy issues at the church.
- A Senior Pastor is part of the decision process to determine the steps required to resolve matters within 30 days or earlier if needed.

Happening On Time LOW RISK (Based on Timelines) Score 1, 4, or 7	Happening With Delay MEDIUM RISK (Delay in Timelines)	Not Happening MACRO RISK (Low, Medium, and High)
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	Score 2, 5, or 8	Score 3, 6, or 9
Seven	Eight	Nine
Four	Five	Six
One	Two	Three

Matters of High Urgency

These are areas with the highest risk score that needs immediate attention. In a DIY (Do-It-Yourself) church, everything seems to be a matter of high urgency. There is no running away from the urgent.

As more team members and an Executive Pastor are hired, the Senior Pastor should be aware and not be involved directly with urgent matters. Others on the team should manage these areas of concern.

6. Emergency Preparedness 1-2-3

An emergency can quickly disrupt us.

One: Fire & Medical Emergencies

Emergency preparedness requires planning, implementation, assessments, training, and regular reviews.

The church needs to be ready for fire or medical emergencies that protect children, young people, seniors, and people with disabilities when attending church events. Planning and training of staff and volunteers can help us avoid casualties, injuries, or disruptions.

The executive leadership needs to give importance to emergency preparedness.

Two: Lockdown

The executive leadership should determine the level of preparedness. Does your church have a lockdown procedure? Does your church have a team that regularly reviews lockdown training and a communication system in case of such emergencies?

In the 1930s, Kiichiro Toyoda, the founder of Toyota Motor Company, coined the concept “*just-in-time*” (JIT). The lockdown procedure is an excellent example of ‘just’ and ‘time.’ What is necessary during a threat needs to occur at the very minute when needed. Church leadership tends to give more time and attention to Sunday stage experience than church security. What is not visible is still essential.

Here are ten key questions that need to be answered by the executive leadership:

1. What is your church lockdown procedure?
2. Who is in charge of the lockdown process at your church?
3. Does the church have a lockdown communication system when possible or actual detection of threat occurs?
4. Who are the team members responsible for lockdown when a church event is taking place?
5. How does early detection of threats take place outside the building and in the parking area?
6. How does detection of threat take place at the church lobby?
7. How is protection provided inside your children’s ministry? How is protection provided inside your worship area? Do Greeters and Ushers move away from the main doors after the church service starts? Is the church entrance protected after the church service has started?
8. Where is the lockdown training material? How is the lockdown procedure kept confidential? You do not want your lockdown process to be known to someone who can use the procedure against the church.
9. The right level of training is available to different individuals. When does the lockdown drill take place at your church?
10. When does debrief and correction of the lockdown procedure takes place? Does any security equipment need to be purchased or installed?

Three: Temporary Leadership

A church's temporary leadership plan is a document that communicates what happens if the Senior Pastor is temporarily unable to carry out assigned responsibilities. It could be due to an accident, illness, or moral failure.

To avoid potential power-grabbing during such moments, the church board and Senior Pastor should draw up a plan that communicates how Sunday preaching and weekly administration will occur. What and who in such a scenario should be communicated to the church leadership and staff to ensure every key player is aware of what will happen in such a situation.

7. Document Retention 1-2-3

In recent years, churches have been held accountable for wrongful or criminal acts, such as sexual abuse. A church may face legal claims for actions that a child or youth experienced at the church many years prior. For legal reasons, certain permanent records should never be purged by the church. If an unfortunate incident with legal implications was to happen, does your CRM provide access to electronically stored documents that are available at the click of a button?

It is not unusual for historical documents to be thrown in bankers' boxes and pushed to a room at the back of the building. Historical records and retention policies are not considered as pressing issues. Document retention rarely becomes part of our CRM requirements. Yet document retention becomes a matter of concern when a member of your staff faces an accusation of inappropriately touching a child participating in child/youth ministry programs. How sure are you that the administrative team can easily retrieve these documents from many years back?

The Income Tax Act provides specific guidelines about how long and what type of documents and records need retention. Historical records, governing documents, bylaws, board minutes, finance (minutes, receipts, charitable giving records, etc.), written agreements, contracts, investment files, and legal documents need good record keeping.

Six questions for church leadership:

1. Does the church have a document retention policy that provides guidelines on documents that need to be kept permanently, for three years, five years, seven years, etc.?
2. Are storage and purging rules communicated to staff and interns?
3. How is the church maintaining hard copies and electronic church records that includes historical records, membership, and legal documents? Does the church have a master filing system in place that secures all hard copies and electronic church records?
4. Are critical documents stored in a fireproof room located at the church or offsite? Are electronic data files kept secure? Who reviews the fire suppression systems and cooling systems where the church servers are maintained?
5. Does a “records journal” exist that records all approvals for documents that need purging? Are these purging approvals automated as part of the document management platform?
6. Does the church have a document management platform that offers O.C.R. scanning and integration into the church CRM as the main system of records?

One: Document Retention Policy & Procedures

A good starting point is to have a written document retention policy and procedure. A document retention policy outlines guidelines on who is responsible for what we do with personal data, information, documents, and safeguards against data and document loss through purging controls and procedures.

Document Retention Policy:

- Purpose,
- Scope,
- Policy,
- Policy compliance,
- Policy implementation,
- Safeguards against purging of records,

- Record retention guide and schedule,
- Suspending the destruction or disposal of records,
- Privacy laws,
- Anti-terrorism, and
- Review of policy.

Document Retention Procedures:

- Document retention team,
- Document purging controls,
- Document naming convention,
- Maintaining proper books and records,
- Retaining electronic documents
 - Digital storage and backup of data for retention
 - Risk assessment: Protection from loss of data, data breaches, cybersecurity, and ransomware
 - The integrity of stored data
 - Optical character recognition (O.C.R.) scanning
 - Managing duplicate documents
- Record-keeping issues that arise with foreign activities.
- Document Retention Platform: It covers permission set, document searching, sharing, co-authoring, mobile access, O.C.R., CRM integration, purging and governance control, and automated workflows.
- Document Retention Training: Church leadership needs to train and create awareness so that proper books and records are maintained.

Two: Naming Convention & Purging Approvals

Most church employees do not consider managing records and information as part of their function. It is not uncommon to find documents kept in different banker's boxes in one of the rooms in the church. Maintaining the

naming of electronic records, files, or folders in a consistent manner is often missing.

Five things to remember as the naming convention, and purging controls:

1. Life Cycle of Records: Procedure should cover

- Identify records for storage.
- Documents are scanned and classified for the retention period.
- Records are stored by following the naming convention.
- Records are secured and assessed by the document retention team.
- The document retention team manages documents that needs purging and retention compliance.
- Staff can check out retention documents by requesting a copy from the retention team.
- Purging approvals of records is based on the document retention policy.
- Document retention management is done through a platform that allows for automated workflow and an audit trail of purging and approvals.

2. Files and Folders: Naming Convention

Church staff needs to be trained to follow a consistent naming of files and folders.

ISO 8601 convention for the naming of files:

- YYYY = four-digit year
- MM = two-digit month such as 01 for January
- DD = two-digit day of the month such as 01 through 31
- Enter the date (YYYYMMDD) at the beginning of the file or folder – to sort chronologically.
- Do not name a document with just alpha or numeric code like “FIN 12.2019.” It does not tell you enough about the content.

- Use short descriptions for file names (less than 25 characters).

Use the Retention Period at the end of the folder

Example: YYYYMM_description-7yrs

(This tells anyone that this document needs to be purged after seven years)

3. Changing a File Name

As a best practice, consistent date and naming conventions must be followed by everyone at the church. Give a short and meaningful name. Do not change “File Extension” or “Delete It.”

Common File Extension:

Audio	Video	Images	Documents	Others
.MP3 .WAV	.MP4 .AVI	.JPG .PNG .TIF .GIF .PSD	.DOCX .PPTX .XLSX .PDF .TXT .RTF .CSV	.ZIP (compressed) .DMG .EXE .HTML .PHP

4. File Naming Rules

- Never use special characters - Avoid the use of these characters like “ \ / : * < > { } & \$).
- Do not use a space in the file name. Use underscore (_) instead of spaces when naming a file or folder.
- Never count on CAPITALIZATION to differentiate between one file and another since file sorts may not be case-sensitive.
- Do not use “Final” in the file name, as any change to the document leads to further complication (e.g., “Final V1” or “Final Final”).
- Use “RevA,” “RevB” when working on a draft version of a document, and “Rev0” when you share a document.

5. Classification of Document and Data

Determine pre-existing numbering (alpha and numeric Identification) with the document retention team based on the document retention procedure.

Three: Personal Data

“The future of Marketing resides in the marketing database, through which we know enough about each client to make relevant and personalized offers to each one of them.” – Philip Kotler.

Running an effective administration means that a church needs to honor CASL, PIPEDA, GDPR, California Consumer Privacy (CPRA), COPPA (1998), and any other law *that provides a legal foundation for privacy*. In early 2021, Keith Enright, chief privacy officer at Google, mentioned that California Privacy Rights Act would take effect in 2023. It will provide protection for residents of the state and the right to opt out of automated systems. Legislations around privacy laws are bound to increase.

There are four things that church leaders need to keep in mind:

1. Ask for permission from your online viewers and onsite attendees.
2. Tell them how you are going to use their data.
3. Give them control to revoke that permission.
4. With permission, use legally available data.

As people trust you with their data, you will have to make sure that the following is in place at your church:

- **Informed**

People have the right to be informed about the collection and use of their data. Review your privacy policy.

- **Erasure (Right to be forgotten)**

People have the right to ask for their data to be removed. For an Online iChurch, can your CRM provide a CASL or a GDPR audit trail for erasure?

- **Get Consent – Email and Texting**

How do we give people a real choice and control over their data?

They should be able to communicate from their electronic device. Data should not be stored in silos or multiple lists so that you continue to communicate when people have unsubscribed from email or have told you to stop texting. Your CRM should be able to manage omnichannel communication.

- **Limit Processing**

Data cannot be used for anything other than the stated purpose. Are you giving oversight to why and how your church is using the data you collect?

- **Limit Data Collection**

Your church needs to limit the data you collect to what is necessary. Reasonable steps have to be taken as part of digital marketing to ensure that the personal data we hold is accurate. Is your team regularly reviewing the personal data they hold and delete anything that they don't need? Who is responsible for this cleanup? For American churches, are you aware that the Children's Online Privacy Protection Act (COPPA 1998) is a U.S. federal law designed to limit the collection and use of personal information about children by the operators of internet services and websites?

- **Limit Storage**

The church should take steps to eliminate personal information that is no longer needed. Data that you hold needs to be reviewed, deleted, or anonymized when it's no longer needed.

- **Keep Data Secure**

The church needs to have appropriate security measures in place to protect the personal data you hold. You need to limit who sees personal data to individuals who have a purpose for using that data.

- **Be Accountable**

The church is responsible for what you do with personal data, information, and documents. Safeguards against loss of data/documents, purging controls, and guideline review are needed.

8. Church Relationship Management (CRM) 1-2-3

For leaders in a Start-up Phase or a Ramp-up Phase, Church Relationship Management, automation, and A.I. is probably not on the top of your list of concerns. Church leaders should keep communication with constituents simple and straightforward:

- Do not fatigue contacts with unsolicited texts and a barrage of emails.
- Automate transactions and not human touchpoints. Do not automate human interactions while facilitating a request from a contact.

One: Traditional CRM to Social Church Relationship Management (CRM)

Branding is now a frictionless experience. We are all seeking a better user experience. A church's CRM needs to help achieve a seamless and omnichannel experience. In Church 4.0, visitors abandon churches that show no interest in them. Your CRM needs to make your church more efficient and improve the overall customer experience.

In the 1970s, Material Requirement Planning (MRP) was developed as a mechanism to calculate materials required by manufacturers. In 1980, Manufacturing Resource Planning (MRP II) software integrated accounting systems, capacity planning, scheduling, and forecasting inventory requirements. Enterprise Resource Planning (ERP) embraced all business functions.

In the 1980s, micro-computer processing power brought in an era of Management Information System (MIS) and Hospital Information Systems (HIS). Since then, tremendous progress has been made in the field of Customer Relationship Management (CRM). In 1981, David Goldman, Paul Muller, and Graham Wylie founded Sage. Then came Act CRM (1986), Goldmine CRM (1989), Sage Saleslogix (1997), and Sage CRM (1998). Marc Benioff, Parker Harris, Dave Moellenhoff, and Frank Domingue founded Salesforce (1999). Cloud-based CRM was well on its way.

Churches today are operating in the “Age of the Cloud.” It is estimated that over 75% of the larger churches and 50% of the smaller churches in North America utilize cloud technology. Church size, revenue, and the number of staff determine the bandwidth to move forward.

The CRM market will reach \$114 billion by 2027. It is the fastest-growing sector in the SAAS space. As the leading CRM platform, Salesforce CRM aims to achieve \$60 billion in revenue by 2034. Top six Salesforce purchase has been Slack for \$27.7B (2020), Tableau for \$15,7B (2019), Mulesoft for \$6.5B (2018), Demandware for \$2.8B (2016), ExactTarget, and Quip. What does this mean for the church and charity administrators?

Your CRM must be future-proof. Future-proofing is a way to determine whether *‘this feature will stick around for the long-term?’* The worst thing to do is build lots of automation using a platform that is slowly phasing out and will not have any updates available. Is your CRM future-proof?

Church leaders need to look into the very best CRM. Do not compromise on this, as it is critical to managing future growth and optimization. What churches experience is that as they start to get bigger, the data become more siloed. The irony is that our consumers are connected, but our church administration is not.

F.R.I.E.N.D.S. (skillset) at the church office has to maintain the magic in the routine. CRM, in a connected ecosystem, is your system of records. There cannot be multiple lists and sources of information. Your CRM needs to be the system of records that helps manage how relationship journeys develop and live. A long-term relationship is a pillar of CRM.

Content and Learning Management System (LMS) should be integrated into the CRM. Live streaming, online event registration, check-in, engagement tools, pre-filled online forms, e-signature for parental waivers, online giving, document retention, compliance dashboard, and omnichannel communication are essential requirements that a church team needs to consider as they organize for growth.

The church leadership team requires structured insights and the ability to learn in real-time. Your team needs to customize and treat every visitor as an individual. Personal contact and an automated process are required to manage multiple touchpoints. It should eliminate data entry. The best CRM

should create a case or task, and offer case escalation and automation to reduce administrative hassles.

Pick the best CRM you can afford to provide a single integrated view of all your audiences and online lurkers. It is the key to helping you identify individual visitors and establish how you can reach them. CRM is the most effective way to engage and track a visitor. It's essential to have a 360-degree view so you can respond to negative comments in real-time.

Online iChurches offering multi-lingual services will have to manage 90 languages in their social CRM. Social CRM should help us to listen to anything that is legally available. The conversation for larger churches needs to pivot from traditional CRM to social CRM. Social media has changed the requirement of our traditional CRM. We communicate with email, phone, text, chatbot platforms, and across 20 plus social networks. The church is often guilty of using many platforms that do not talk to one another. It is not good to have emails, text messages, phone calls, chatbots, and social network data living in different silos.

Your team needs actionable insights from your CRM to drive authentic relationships. Your CRM needs to integrate at scale and the moment of truth. Investing in cloud technologies helps in cost-savings, easy access, online support, and security. Take the time to build a connected ecosystem. That is the electric car of church administration.

Two: CRM Mindset

The CRM solution needs the attention of the executive leadership. The challenge is that leaders have limited time. We survive by giving little attention to things that are not urgent. We find ways to solve problems quickly. There is a word for this. It is called "*heuristic*." It is a mental shortcut that allows leaders to make judgments efficiently. We operate on little information all the time. It becomes a survival technique.

We seek digital transformation. Yet we find shortcuts to picking up a CRM to manage what is not visible. As a leader, you know when your internal processes are fragmented. The trade-off made for speed, and low cost in a Start-up Phase or Ramp-up Phase is now hurting you when it comes to automation and optimization.

Important areas need a significant amount of your time. A good CRM optimizes you as a leader. It is one of the most critical decisions that you will make. Your CRM needs to streamline operations to maximize efficiency, connect, and engage. The type of CRM that you select matters in the long run.

Journalist Matthew Syed in his book, *Black Box Thinking: Why Most People Never Learn From Their Mistakes – But Some Do*,¹² wrote:

“...suppose that instead of practicing in daylight, you practice at night—in the pitch-black. In these circumstances, you could practice for ten years or ten thousand years without improving at all. How could you progress if you don’t have a clue where the ball has landed? With each shot, it could have gone long, short, left, or right. Every shot has been swallowed by the night. You wouldn’t have any data to improve your accuracy.”

Executive Pastors need to pay attention to what Matthew Syed is suggesting. Your CRM is a connected ecosystem that provides live Reports and Dashboard. It makes your life easier as an administrator. Lack of effective measurement is not going to help you or the church as it experiences growth.

You have to push for efficiency. You will have to provide leadership to eliminate manual steps and processes. To achieve this, you will need to lean on technology. Now is the time to automate backend systems.

A leader’s CRM mindset will need to encourage alignment of IT initiatives, church goals, and security management. How can you remove the antiquated paper-based newcomer card and other processes that are redundant?

I have a strong bias towards Salesforce CRM. It may not be a viable solution when you are in a Start-up Phase or Ramp-up Phase. If your church has more than four people to manage the backend processes, Salesforce CRM is the perfect toolset. Companies use Salesforce to increase loyalty, engagement, and conversations. Its real-time cross-channel personalization, A.I./machine learning capabilities, robust customer data, audience segmentation, and engagement platform are ideal for churches. Your data does not have to be siloes in channels.

Salesforce CRM features should allow you to manage:

- multiple touchpoints,
- multi-channel integration,
- omnichannel,
- learning management system,
- document retention with O.C.R. scanning,
- social channels,
- live reports and dashboards,
- automation,
- online forms, pre-filled forms, and e-signatures,
- opportunity stages, customer engagement, and journeys,
- scoring and grading of a customer engagement can help send the right message at the right time, and
- personalization at scale.

Salesforce excels in behavioral targeting. Automation and predictive analytics help. Salesforce Marketing Cloud is suitable for digital marketers. Interaction Studio enhances the power of the Marketing Cloud with real-time personalization. You can communicate from your CRM on a person's preferred channel for marketing. Email and text engagement is an important metric. Other actionable metrics that matter the most are engagement, activities, contributions, the customer lifetime value, and the customer journey.

Question: How expensive is Salesforce CRM?

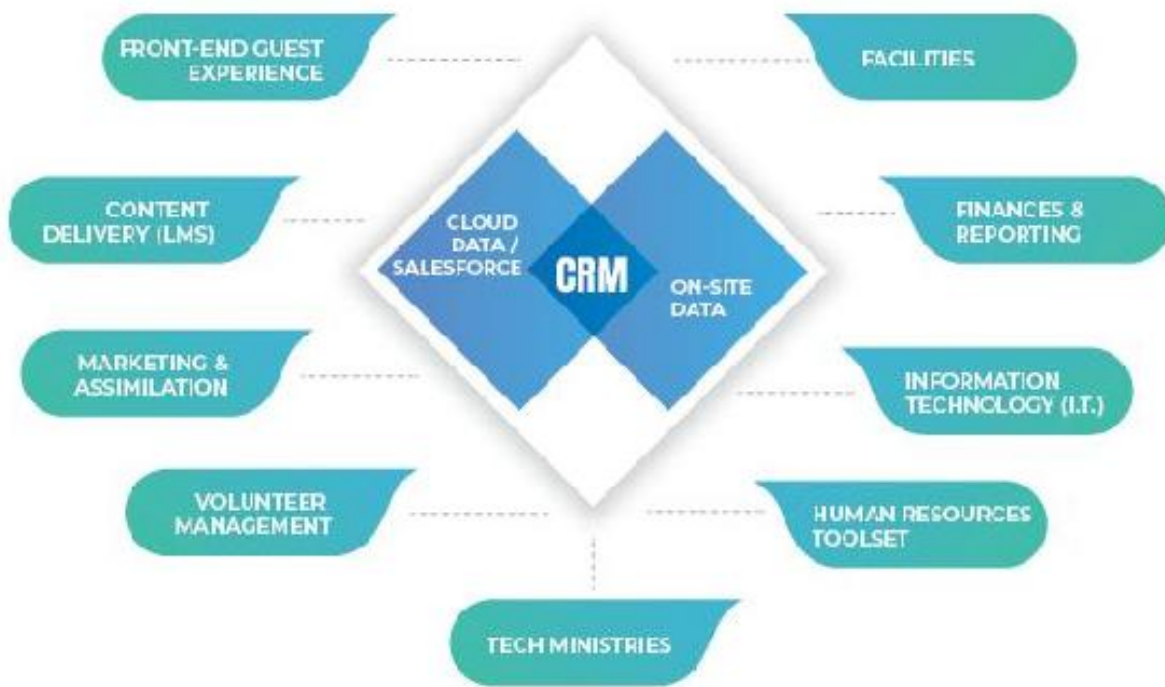
What if I told you that for churches and charities, ten licenses are free. If you have a team (F.R.I.E.N.D.S.) and are in an Expansion Phase, then Salesforce CRM may be something to consider as part of your long-term strategy. If you have twenty on staff or ten additional Pastors and administrative team members, you will be spending \$720 a year on your CRM. If you can spend a one-time cost of around \$10,000, you are in a position to customize the CRM that works for you.

Three: CRM Checklist

CRM Requirement:

A marketing platform is not your CRM. It is a mistake to make a CRM decision based only on the marketing function.

For leaders who run mid-to-large size churches and charities, leadership responsibilities come with a lot of challenges. Church leaders need to implement the best of tech tools. It's necessary to understand what a connected ecosystem means to fully appreciate why the low-end technology that you have been using will not get you very far. Leaders face the challenge of finding an affordable CRM solution that connects a multitude of functions. Most churches have to organize over 40-45 functions.



In the chapter “Last 90 Days As An Executive Leader”, I offer an assessment table that can help you build a connected ecosystem.

There are 47 areas listed that cover ten operational needs at the church:

1. CRM as the primary System of Records.
2. Front End: Better Guest Experience & Communication System.
3. Content Delivery & Leadership Development System.

4. Marketing & Assimilation System.
5. Volunteer Management.
6. Tech Ministries.
7. Office Staff & Improvement Management.
8. Information Technology (I.T.).
9. Finance, Approvals & Reporting System.
10. Facilities.

BACK-END: OPERATIONAL

Governance

- Risk Management and scoring.
- Legal, Policies, and Procedures.
- Compliance.

Human Resources (F.R.I.E.N.D.S.)

- Volunteer Management.
- Vacation Approvals.
- Project Management Tool.
- Internal Communication (Groups).

Finance & Accounting

- Payroll & Benefits.
- Expense Approvals.
- Purchase Approvals and Supplies.
- Asset Inventory and Controls.
- Facilities Bookings and Maintenance.

Information Technology

- Privacy Policy, Cybersecurity, and Ransomware.

- Data Backup, Protection, Platforms, and Data Integration.
- Document Retention (O.C.R. Scanning).
- Reports and Live Dashboards.
- Data Analytics and Visualization.
- Automation and Permission Sets.
- Church Relationship Management.
- Your Cloud Data.
- Your On-Premises Data.
- Your Interface.
- Your Techs and Toolset.

FRONT-END: GUEST EXPERIENCE

Guest Experience

- Online iChurch & Chatroom.
- Website, Church App, and Digital Kiosks.
- Event Management, Calendar, Registration, and Check-In.
- Online Forms, E-Signatures, Waivers, and Consent.

Learning Management System (LMS)

- Training and Orientation.
- Webinars.
- Zoom.
- Learning Management System.

Digital Marketing

- Omnichannel communication such as email, text messaging, chatbots, phone system, CASL/GDPR compliance.
- Social Media Management such as digital playlists and reputation management.
- Google Grant and Google Ad Campaigns.

- Search Engine Marketing (SEM).
- Evergreen Webinars.
- Google Analytics.
- Online Directories and Reviews.
- Hashtag Research.
- SEO and YouTube Optimization.

Digital Content

- Videos, Blog, Vlog, Images.
- Podcast.
- YouTube.
- Social Media Content.
- eCommerce Site.
- Lead Magnets: eBooks & Digital Giveaways.
- LMS Content & Courses.



Executive leaders need to understand the importance of building a connected ecosystem. Salesforce is my personal CRM bias. You can reach

out to me to find out more about how I have been utilizing Salesforce. Ask Amitabh¹³ on my website: amitabhsingh.com.

9. iChurch Online 1-2-3

“The internet will make the winners bury the stragglers.” - Philip Kotler.

Church leaders should think of themselves as providing relevant content in a permission-based marketing context. Online iChurch is a strategic ministry decision. It is part of a more comprehensive content strategy.

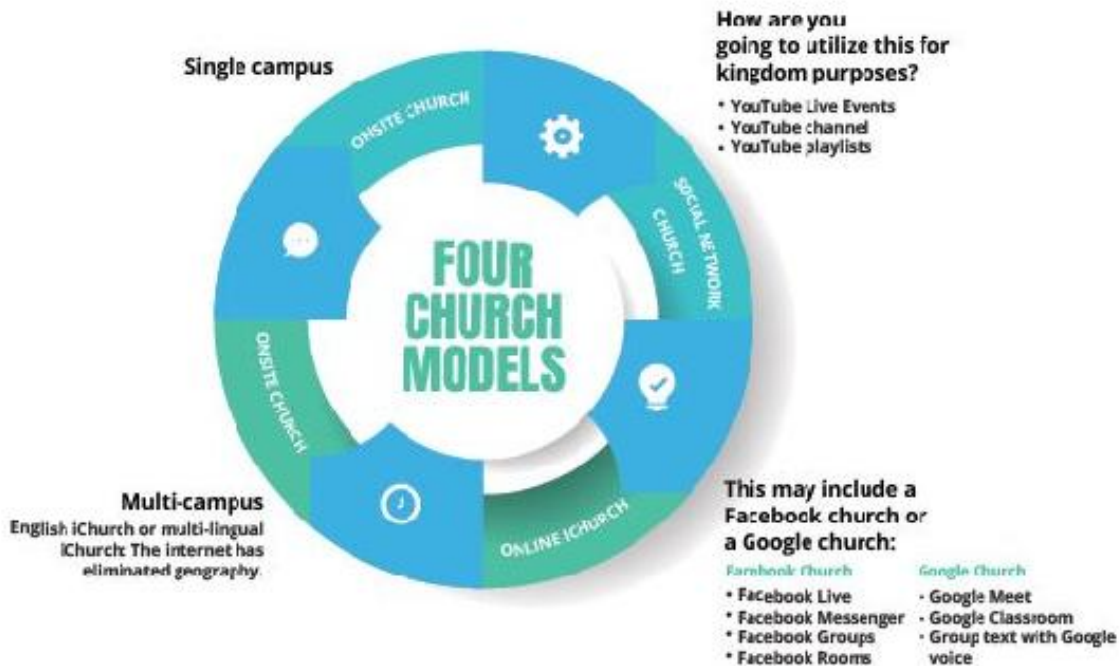
- Church 1.0 was location-based and was available on Sundays.
- Church 4.0 is online, leveraging YouTube, and social media, to provide permission-based content 24/7.

2021 to 2030 will record a technology carnage that humanity has never seen before. Church leaders will have to embrace automation and technology. The leadership mindset needs to change from viewing technology as a disruptor to accepting it as an enabler that helps us engage with our constituents.

Our permission-based conversation will be dependent on the overall frictionless experience that we offer. In my book for Senior Pastors, “The New Normal for Leadership: Innovation and Technology for Church 4.0”¹⁴, I wrote:

Every content provider is about to be rocked by Artificial Intelligence (A.I.) in the first five years and Virtual Reality (VR) in the next five years. Universities, Schools, and Churches should brace themselves for dramatic changes in consumer behavior. Content will be available on-demand, frictionless, and interactive with A.I. creating an experience based on your individual preference.

In Church 4.0, leaders are now running four different churches:



Clarity is needed as to who is providing leadership to your iChurch Online. Does the Senior Pastor or the Worship Pastor take the lead in hosting and producing? Does the church have a Tech team to manage the technical responsibilities, WiFi issues, camera angles, sound, and lights?

iChurch Online also needs clarity in terms of who is opening and closing the online experience. The onsite church has Greeters and Ushers welcoming attendees and making sure the exit remains a warm experience. The iChurch Online needs to be no different. The iChurch Online Pastor or a Host at the start and the end of the iChurch Online plays a vital role in making a new online visitor feel welcome and comfortable. It is about digital engagement and gaining permission to minister.

One: Is Internet Church (iChurch) Really A Church?

Laura Turner wrote an article in the New York Times titled “*Internet Church Isn’t Really Church*”¹⁵. Here is how she described her wrestle with the iChurch.

1. *“Going to church – sitting in a room with other people for an hour and a half on Sundays – is non-negotiable for me, unless I’m out of town.”*
2. *“The intention behind live-streaming services – to make the church, and its attendant benefits of community, prayer, and worship, available to everyone with a smartphone – is a good one. But it presumes that God is primarily present to us one on one, as individuals, rather than as a community of believers. This is not what the Bible says..”*
3. *“In an era when everything from dates to grocery delivery can be scheduled and near-instant, church attendance shouldn’t be one more thing to get from an app. We can be members of a body best when we are all together...”*
4. *“This, then, is the beauty of the church: not that it is perfect or convenient or fits easily into my life but that without it, my life would be deficient....But I don’t believe I would truly be a Christian without the real, in-person, Sunday morning church.”*

In 2006, 14 years before the 2020 pandemic, Craig Groeschel was criticized for starting an “internet campus.” Before the pandemic, 3,000 churches were using the Church Online platform offered by Life Church. By August 2020, 27,000 churches were using this platform. The pandemic in 2020 swung Pastors to one end of the pendulum.

By the beginning of 2021, North American churches were immersed in Church 4.0. We moved from traditional to digital communication. Pulpit to the pews moved to online and social media. Leaders started to utilize online tools to attract and create genuine human-to-human touchpoints to retain regular attendees and engage newcomers.

There is a growing need to attract online and engage locally. Zoom fatigue taught us that the online-only experience is incomplete. We can live-stream Joel Osteen, Rick Warren, or Andy Stanley, but people like Laura Turner still long for a local community engagement. Take the case of Starbucks. It is designed to offer a third space between our workplace and home. Likewise, the local church is the third space for people looking for a like-minded spiritual community, offering genuine human touch and safe

physical distancing. Joel, Rick, or Andy will not provide that type of interaction to our local community. You are the local Church 4.0.

We should be thinking of offering a better and a different iChurch Online experience. 5G is the buzzword now. Lag-free videos and delays in speed will be a thing of the past. Visitors can download a 4K video in a second. We are now looking at the overall experience driven by multiple wireless cameras streaming through the 5G network.

Broadcast with 360-degree cameras will allow the audience to watch from any viewpoint. Technology change will bring augmented and virtual reality to our doorstep. Streaming technology will push church leaders to create a more engaging experience.

The iChurch Online will become the overall experience. I quote from Maya Angelou:

“At the end of the day people won’t remember what you said and did, they will remember how you made them feel.”

Bobby Gruenewald is the Innovation Leader at Life Church who pioneered the missional use of technology that allows Life Church to reach people in every country. Bobby oversees the YouVersion Bible App, Open Network, Church Online, Information Technology, Creative Media, Spaces & Places, and Communications teams. In a 2020 webinar, Bobby discussed how they leverage technology to be non-creepy. Is it about building better engagement campaigns, or is it more about managing church smarter?

Everyone wants to reduce costs and increase revenue or attendance. Church leaders need to understand all of the engagement journeys, put them into a process, and figure out how to automate them. It’s also a question of scale. It has to be scalable, shareable, and updatable.

iChurch Online is a church as long as you treat it like an online ministry and not like an online product. During the 2020 pandemic, many churches rushed into the iChurch arena. One North American church was copying from another North American church.

“Remember that there are many people who think they want to be matadors, only to find themselves in the ring with two thousand pounds of bull bearing down on them, and then discover that what they really wanted was to wear tight pants and hear the crowd roar.” - Terry Pierce.

Online iChurch is a ministry and not an event. In that case, larger or mission-minded churches in North America will have to think beyond the English language, North American music, and North American culture. Executive leadership will have to think deeper and remove the blindspot towards our North American culture and music.

There are over 6,900 language groups with little exposure to the gospel. Nearly 3,000 of these unreached groups have no known witness of Christ. Church leaders will have to embrace a global mindset while discussing online ministry opportunities. Church leaders discuss church planting. Church leaders should consider offering an Online iChurch in another language.

If I ever meet Craig Groeschel, my question to Craig will be as follows:

“If your goal is to reach people in every nation, then does 90 runs of an English service or ten runs in the top 10 languages of the world reach more people?”

If I live in Pakistan or Kashmir and speak Lahnda, watching Craig Groeschel or Steve Furtick’s service in English does not help. I don’t understand the language.

Consider this:

1. Chinese: 1.3 billion native speakers
2. Spanish: 460 million native speakers
3. English: 379 million native speakers
4. Hindi: 341 million native speakers
5. Arabic: 315 million native speakers
6. Bengali: 228 million native speakers
7. Portuguese: 220 million native speakers
8. Russian: 165 million native speakers
9. Japanese: 128 million native speakers
10. Lahnda (western Punjab, Pakistan, and Kashmir): 118 million native speakers

Is Church 4.0 about discipleship, ministry, and building a spiritual community? Then we need to discuss multi-lingual and cultural roadblocks. I am not suggesting every church needs to do this. iChurch Online not being multi-lingual is a shortsighted response. Mission in Church 4.0 needs to consider the online opportunities available to North American churches. In Luke 10:8 NLT, Jesus tells us:

“If you enter a town and it welcomes you, eat whatever is set before you.”

As we virtually enter towns around the world, we will have to be respectful of the food and culture of the people. Are we showing a lack of awareness of the global needs, language, and culture in our iChurch Online? We have to remember that although we have iChurch Online available in the English language, one size does not fit all.

Besides the language and North American cultural challenges, we are also not in the business of generating digital lurkers. We all realize that anonymous digital lurkers are watching our Online iChurch or a webinar. We build trust so that the digital lurkers share with us. Chatroom volunteers offer quality online resources so that anonymous lurkers would trust us with their name and email address.

Engaging online is about responding to inquiries. The first step in an online follow-up has to be quick and straightforward. You need technology to automate the next step. You need to use the responsive form. URLs and text providing free offers during the online service, chat room, YouTube description, social media, and website are vital to generating leads.

It's challenging and, depending on the church size, nearly impossible to follow up individually with each person who watches online. Prompt response and automation of the follow-up process are needed to ensure that new contacts are not slipping through the cracks. Your CRM should help to automate email and text to offer omnichannel responses.

It takes a lot more to run iChurch Online than just going online. If pastoral care in iChurch Online has not been a top priority, it needs to be on your radar in the 2020s. 49% of the consumers say they unfollow a brand because of poor service. Visitors can ignore your emails, “Stop” your text messages, and unsubscribe to your communication. Marketers cannot ignore any questions they receive online. Besides emails and texts, churches

should use Facebook Groups or Facebook Rooms and Zoom calls for better follow-up. Platforms like Calendly and Chatbots can help book appointments online as church staff, and volunteers make themselves available in short windows of time on their schedule.

In an onsite church, you have brochures, television screens in the lobby, and signage providing information. In iChurch Online, the call to action will have to be clear and concise. Visitors will find you on your website, YouTube, online directory, and social media. You will have to make contact more personal. Personal prayer in the chatroom will have to become a unique experience. Chat hosts should fulfill promises made in a chat. Your online church attendance will not grow if unique visitors are only watching your content for 30 seconds. Your engagement needs to be honest and genuine.

Traditional CRM needs to move to Social CRM to track and measure a profound engagement level. It's more beneficial to access a live engagement dashboard and report that helps a church better understand its online performance. Online and digital analytics is essential to track deeper engagement and nurturing pathways.

Two: Platforms for iChurch Online

For Do-It-Yourself (DIY) churches in a Start-up Phase or a Ramp-up Phase, Craig Groeschel and Life Church offer churchonlineplatform.com as a free tool to help manage an online ministry without the barriers of technology. It is a good solution.

Your goal as a church leader should be to offer your Online iChurch platform embedded on your website. If your church's online platform does not allow this, then whenever it's feasible, you should move to another platform that works better for your church. You cannot allow your visitors to move away from your website when watching online or donating online.

Consider eight core components of effective online engagement:

1. A video player. Two video streaming providers to consider are:
 - StreamMonkey.com
 - MediaFusionApp.com

2. Live Chat feature allows you to chat in the public area and chat with a user in a private room. Two live chat providers to consider are:
 - LiveFyer.com
 - ChatRoll.com
3. You should be able to scheduled timings to stream with live chat and broadcast as needed.
4. A notes tab so visitors can take notes during the service and email the notes to themselves or their friends.
5. An online connection card should be available so that visitors can connect and respond.
6. The calendar tab shows the time of all the services.
7. Social media integration – so you can Tweet, etc.
8. Integrating your online church platform to Church Relationship Management (CRM) automation for follow up and tracking

There are a few platform options that are available to churches offering Online iChurch.

- a. **Free Church Online Platform** provided by Life Church. <http://churchonlineplatform.com>
- b. **Brushfire.com** - Hillsong Church, Gateway Church in Texas, and Prestonwood Baptist Church use Brushfire. Brushfire is a paid platform but offers an all-in-one solution for virtual events and Online iChurch. The advantage of using this platform is that we can embed it into your website. You keep a customer more secure in your ecosystem. Check their pricing at <https://www.brushfire.com/pricing/>.
- c. **YouTube** is another platform that you can use for the Online iChurch. Transformation Church (USA), Meeting House (Canada), People's Church (Canada) are some of the churches that use YouTube for their Online iChurch.
- d. **Customized platforms:** Crossroads Church (Brian Tome, Cincinnati) and Saddleback Church (Rick Warren) use their

customized platforms.

1. The J.W. Player can provide a customized viewing area.
2. LiveFyer.com or ChatRoll.com can provide the chat feature.
3. Notes Tab can provide a breakdown of notes, and your viewers can jot down notes and email them to themselves or their friends.
4. Below the chat feature, you can provide an engagement option.

Marketing professionals from Procter and Gamble (P&G) started Crossroads Church. With an annual operating budget of \$33 million and a staff of 274 people, they continue to employ sophisticated marketing techniques. Brian Tome, the Senior Pastor, puts it this way:

“The goal was never the size... and continues to be based upon the ideas of authentic community, honest communication, and exploring the question: Where is God taking us next?”

Crossroads Church uses an online service platform that integrates to its website and App. Crossroads also offers weekly worship on Facebook: <https://www.facebook.com/crsrdschurch/>.

e. You can check OnlineChurch.com.

f. You can check <https://www.tvapp.church/>.

Three: Moving Measuring from ABC to DEF

You have heard it said that “*you cannot manage what you don’t measure.*” How do you measure effectiveness in a phygital Church 4.0?

“Standing nearby were six stone water jars, used for Jewish ceremonial washing. Each could hold twenty to thirty gallons.” - John 2:6 (NLT)

“So Simon Peter went aboard and dragged the net to the shore. There were 153 large fish, and yet the net hadn’t torn.” - John 21:11 (NLT)

I am fascinated by John 2:6 (120-180 gallons) and John 21:11 (153 fish squirming in Peter’s nets).

Why count or measure? What is the yardstick for measuring the ministry’s online effectiveness?

Unfortunately for churches, our Annual Report at the Annual Business meeting does not tell the complete story.

- Financial information and attendance numbers are not enough. Revenue over expense is not our mission.
- Our strategic perspective needs to cover our short-term and long-term milestones. You need to explain the church's mission and how the church's strategy delivers on its mission.
- Our measurement needs to track both onsite and online engagements.
- Church 4.0 is about discipleship, ministry, and building a spiritual community. We are not in the business of generating digital lurkers. Seth Godin puts it this way:

“Sending your resume, showing up at the networking reception, hanging out at the single bar – those are dumb ways to lead the tribe, and they’re not even useful ways to be a valued member. Showing up isn’t sufficient. Friending ten or twenty or a thousand people on Facebook might be good for your ego but it has zero to do with any useful measure of success.”

- Your CRM needs to measure engagement and progress along the customer's journey.
- How do you measure connectivity? A church should measure a frictionless experience across all online and offline multiple touchpoints.
- Track the drop-out rate that takes place along different points of a customer's engagement journey.

Onsite ABCs to DEFs

- **A**ttendance, **B**uilding, and **C**ash (ABC) was about quantity.
- **D**iscipleship, **E**ngagement, and **F**aith-building pathway (DEF) is about quality.

Online ABCs to DEFs is the new challenge.

- Quantity: Number of people on digital journeys, social media, YouTube, and Online iChurch.
- Quality: Number of people participating in your discipleship/spiritual formation journeys and your engagement dashboard.

Activity-based versus Outcome-based goals:

- Deciding to lose weight is an activity-based goal.
- Deciding to lose five pounds in 14 days is an outcome-based goal.

In Church 4.0, what are the outcome goals that you have for iChurch Online and social channels? Do you have data available on how many are following Jesus because you have a digital ministry?

- How do you know you are accomplishing your mission?
- How do you measure the impact on newcomers and members?
- How do you measure program effectiveness?
- How do you measure your effectiveness on iChurch Online and social media channels?
- How do you measure an increase or decrease in online engagement?

Have your administrative team selected and installed the analytics tools that will provide all the data you need? Live dashboards and reports will instantly provide you with decision-making visibility. Your CRM should be able to pull information directly and automatically from your ecosystem. Your CRM should update numbers automatically and provide real-time analytics.

The size of your church decides your digital playlist. Not all social channels use the same yardstick. Your CRM should provide sophisticated reporting tools across multiple channels.

Social media channels and websites need to integrate into Google analytics, social channel analytics, and your CRM for traffic monitoring. Google analytics and Social Media analytics are free. CRM live dashboard and

reports need to track the journey and long term Return on Relationship (ROR):

- How do you measure word of mouth (social network) dominance and brand loyalty?
- How do you measure increase commitment?
- How do you measure increase affinity?
- How do you measure usage of your content by a lead or a newcomer?
- How do you track your lead/prospect conversion rate?
- How do you monitor the conversion rate of your offers (CTA)?
- How do you track a visitor dropping off?

Companies listen to everyone who is commenting about them online. Artificial intelligence is cutting through 3 billion smartphones and 60 billion messages every day to provide structured insights to companies committed to listening. Research shows that negative word-of-mouth is seven times more impactful than positive word-of-mouth. A dissatisfied customer ends up telling 9 to 15 people about their bad experience. On social media, negative comments spread even more.

Traditional CRM was able to give us analytics and a dashboard about demographics. Social CRM is now providing analytics and a dashboard about psychographics, what the audience likes and feels. Unstructured data such as photos or videos are now being converted to structured information. It's the new normal. How does your church track and measure online listening?

Different metrics are needed to measure success onsite, online, and social channels. Phygital church is now measuring beyond its seating capacity.

1. Measuring increased missional engagement.
 - a. How do you measure social channel engagement?
 - b. How do you measure iChurch Online and chatroom engagement?
2. Measuring lead conversion.

3. Measuring retention rate:
 - a. We are measuring a lead becoming part of your community and staying engaged.
 - b. We want to know why are people are attending our church.
 - c. We want to know why people left our church.
4. Tracking Google analytics tied to website, landing page, and campaigns.
5. Following social channels, iChurch numbers, the effectiveness of hashtags and Google Ad campaigns keywords, and anything that is part of Search Engine Marketing (SEM)

In Church 4.0, we are now tracking different metrics:

1. Financial metrics
2. iChurch Online metrics
3. Onsite attendance metrics
4. Social channel metrics
5. Google analytics metrics
6. Hashtag, SEO & SEM metrics
7. Digital marketing metrics
8. Church Survey metrics – other demographic, retention, and multiplication metrics
9. Healthy church metrics – C.H.A.N.G.E.S. model

What Is A Healthy Church? ¹⁶

Here is a simple **C.H.A.N.G.E.S. model** as a way of looking at the health of your church.

CONNECT by personally contacting a newcomer within 24-36 hours. We want to make all the visitors our heroes. As a church, we should provide authority and empathy for their journey of faith.

HELP of volunteers. What is the ratio of volunteers to the total number of attenders that reflect healthy volunteer engagement? 7:1 ratio or any other

that you set as a goal represents your community is using their gifts to contribute to the whole.

ATTENDANCE should increase by 7% a year. Growth is a natural byproduct of people who feel a sense of belonging and purpose while attending your church.

NURTURE through small groups (10:1 or 5:1 ratio). Is this an intentional blueprint for self-evaluation and a pathway for spiritual formation for those who attend your church?

GENEROSITY (\$25 to \$40/per person/week) and giving are a byproduct of meaningful investment in the whole body and awareness of the biblical principles of stewardship.

ENJOY a day of rest. If your team works on Sunday, when do they rest and relax and observe the Sabbath?

SUSTAINABILITY could be comprised of many things and is a reflection of the health of your church. Here are some areas that you can consider for measuring sustainability:

- revenue over expense.
- the total mortgage is not more than 2.5X of your total revenue.
- at least 10% of the budget is set aside for mission.
- personnel cost is not more than 50% of the budget.
- cash reserves are available, which represents 3 to 6 month of the operating cost.

10. Growth Strategy 1-2-3

According to Barna, in 2020, 20% of the churches in North America will be closing their doors forever. The average lifespan of an S&P 500 listed firm is now 15 years. In 1960, it was 60 years. Failing to adapt and change in a timely way can be a fatal mistake. Technology will continue to change the way business is done. Executive leaders will need to look at their growth strategy.

YouTube is the second largest search engine. More than 3 billion monthly searches take place on YouTube. Barna Research suggested that over 100 million North Americans of all ages are unchurched. When people are on Google or YouTube and searching for an answer, you as a church need to be present.

One: Google Ads Grants & Search Engine Marketing (SEM)

It takes a lot to attract a visitor to your website. Google provides non-profits with an opportunity to utilize USD 10,000 each month to attract more visitors to their website and generate more leads. USD 120,000 a year (CAD 158,000) in free advertising on the Google Ads platform can be a powerful part of your growth strategy. If you broadcast or live stream church services online, you can be highly effective in your free advertisements that point people to your online services and offers.

Churches can apply for the Google Ads grants program to advertise online just like any other business. Here are the five steps to qualify for free advertising:

- Check your eligibility.
- Apply for Google for non-profits.
- Enroll in Google Ad Grants.
- Create your church account.
- Submit your account for review.

People have questions about prayer, faith, Bible, marriage, divorce, and other pain points. Your church can help people find the answers. You can use keyword combinations to reach more people online. Your team should focus on Google Ads campaigns and optimizing these campaigns to target your audience.

To optimize on USD 120,000 each year, you will have to utilize geo-targeting, taking into consideration:

- Your Google Ads should be relevant to online search.
- Managing related keywords, active text ads, and site link extensions are needed.
- Google Ad and keywords need to reflect your primary mission. Churches should not use branded keywords not affiliated with their church brand. You cannot use generic keywords like “free e-books.”
- Google is also not in the business of giving money to organizations that use anything considered to be “hate speech.” Churches cannot use keywords or URLs for websites and landing pages that promote hatred, intolerance, discrimination, or violence.

Google Ads show up in the top three or four results in a Google search. You want to rank higher in Google searches. You want to improve on your Search Engine Marketing (SEM).

Search Engine Marketing (SEM)

SEM is the practice of marketing your church by using paid advertisements that appear on search engine results pages (SERPs) to promote your church website. If you decide to use SEM, it's essential to be mindful of content writing, email marketing, website design, and the customer funnel.

Google Ads Pay-Per-Click is Google's online advertising platform. Church marketing teams bid on “trigger” words and phrases that prompt church ads to display in sponsored search results. Advertisers pay a fee every time someone clicks on one of these ad campaigns. These advertisements appear at the top of a search results page.

As your church considers taking advantage of a Google Ads Grant or SEM using paid searches, your team will have to track pay per click (PPC) listings and advertisements and understand search engine optimization (SEO).

There is an additional backend workload that needs attention.

- The church team must cover Google Ad and analytics, NAP, 404, 301, and 302 errors, CRO, backlink, and local directory listings.
- Google's Panda/Penguin (SEO algorithms) changed 3,000 times last year.
- The TikTok algorithm is different from all other social media channels.
- The church team must manage the YouTube playlist, description, and backlink need to be managed.
- Hashtag and keyword research is part of the strategy to build a bigger following.
- Social Channel Management - You have to stay on top of negative comments about you and your church. Reputation management, listening, and interacting are essential.

Doing whatever it takes is not a strategy. It is a recipe for a burnout. Be intentional about your growth strategy. Blindly imitating mega-churches is not the answer. Take the case of Elevation Church with Steven Furtick Jr., Pastor in Charlotte, North Carolina. They have over 200 employees, with 16 full-time staff members managing social media. On their staff, they also have a full-time YouTube strategist. Life Church (Craig Groeschel, Senior Pastor) has 800 staff members. Mega-churches have more extensive resources for their digital ministry. The size of your church and the strength of your F.R.I.E.N.D.S. skillset should help you to decide which social channels will offer you optimization.

Smaller churches should not use too many social networks. It needs to be interpreted differently by church leadership based on their growth phase. Even if you are open to a social media mindset, the limitation in the skillset of your team and the toolset (the social media management platform)

available to you should prompt you to have a realistic digital playbook. Churches don't need to be on every social media channel. If you are a small DIY (Do-It-Yourself) church, you can utilize Facebook, Facebook Groups, and Instagram. Instead of spreading yourself too thin, you are better off doing it well on one or two social media channels.

41% of marketers admit that they lack bandwidth. It takes time and money to create digital content, images, and video. The content has to be relevant to your audience. Review the content from last year and flag posts that receive high engagement. Consider turning topics into visual or video content where people engage even more than text. Consistent, beautiful, and engaging content needs to be your focus.

Be consistent and sustainable with your growth strategy. It's a reality that in many of the smaller D-I-Y (Do-It-Yourself) churches, skillset may be lacking to manage onsite services, iChurch Online, and all the digital playlists well. It's a mistake to do very little. It's an even bigger mistake to try to do too much.

Check www.amitabhsingh.com for a free Strategy session that helps you to build around your church context. Less can be more.

Two: Reviews and Online Directory

People are consistently making purchase decisions based on online customer reviews. According to statistics, 60% of purchase decisions are being completed online and with little or no contact with the company. People are verifying what an organization says on their smartphones. Shopping online has become the third most popular use of smartphone technology.

Visitors seek reviews online. Google research shows:

- 80% of smartphone users in North America carry out online research while in the store.
- 87% of consumers say reviews influence their purchase choice.
- 28% of consumers say they have looked at the business review before they connect.

Church reviews are here to stay. Reviews on your church website are more important than ever before. Churches need to pay more attention to the top review sites. Church reviews and social posts are part of online reputation management.

There are right ways and wrong ways of getting reviews. There are many ways in which a church can ask for a review. You can ask for a review as part of an email notification. A church can also use its website footer to ask visitors for reviews.

People are busy, and they will not remember to write reviews unless asked quickly and promptly. People may feel more comfortable leaving reviews on a trusted review site. Here is a few review website:

- Google My Business - Average monthly US traffic of over 150 million.
- Yelp - Average monthly US traffic of over 40 million.
- Yellowpages - Average monthly US traffic of over 10 million.

Google My Business is a free tool to manage your online presence, including Search and Maps. Churches will have to verify their information to complete their Google My Business registration. Set up Google My Business as follows:

- While registering, manage your name correctly. Google can demote your listing if you tamper with your name to “Name – City.”
- Under “where do you serve your customers (optional),” you can add the different areas you serve.
- Under the current website URL, get one if you don’t have it.
- Your “mailing address” is where you will get a Google postcard in the mail for verification.
- Under “appointment links,” you can point to the page on your website where you take consultation or Calendly appointment.

You get 750 characters to describe your church. Before you write about your “product or service,” take some time to understand your Google keywords and the keyword phrase that church would like to use. You can

add photos and videos also. You can add a geo-location to the video but don't spend too much time on this as it makes a negligible difference every year. For "posts," you can add free offers or time-based events.

Churches should look at their Google Maps ranking. Claim your church business through Google Maps. When people search for words associated with your church, Google will likely show them your church because you have claimed it in Google Maps.

The quality of your website for a related niche gets you rated higher in Google search. Churches need to work on link building. How are many links (backlinks) are pointing to your webpage?

NAP Inconsistency will lower your ranking: Your Church Name, Address, and Phone Numbers, known as your NAP, need consistent citations.

An online review site can be a powerful way to get the word out about what God is doing at your church. Google customer reviews also help improve the SEO ranking of the church website. An online review is not the most significant ranking signal. Who and how you reply to bad reviews matters. Churches should not fear negative reviews. Demonstrate your professionalism.

Example of a reply to a negative comment from an unknown visitor:

"We love to make our Church attendees always happy in the manner we serve, but we have no record of working with you. Can you give me a few more details, please?"

Always negate them by responding to both good or bad reviews. Do not reply online in anger. Reply in a manner that deescalates the tone. In doing so, you will demonstrate that your church genuinely cares.

Three: Engagement for Retention or Multiplication

Church leadership needs to track different engagements. Engagement for Retention is not the same as Engagement for Multiplication.

Engagement for Retention:

A digital lurker is anonymous. When people trust us with their name and email, we track them as a "lead" or a "prospect." Digital assets are needed

to nurture “leads” and “prospects.” Making it clear, simple, and easy to “Start Here” helps to convert a “lead” to a “contact.”

Andy Stanley and North Point Community Church have full-time data visualization staff members. Their engagement data, as narrated to me in 2019, was as follows:

- 30% of the people drop out with one point of engagement
- 5% of the people drop out with two-point of engagement
- 4% of the people drop out with three points of engagement

The goal is to move a “lead” or “prospect” to a deeper level of engagement. Data shows that the first 120 days of a newcomer’s journey significantly impact the retention rate at the church. Retention nurturing could cover a “Start Here” page on your website that offers:

- Water Baptism
- Alpha
- Small-Group
- Serve Opportunities
- Plan Your Experience
- Coffee with Pastor

Jay Kranda is the Online Campus Pastor at Saddleback Church in Lake Forest, California. He is also the co-host of Social Media Church Podcast and author of *Social Media Made Easy: Inexpensive Online Marketing Guide for Non-Profits*. In a 2020 webinar, Jay mentioned how the process at Saddleback Church with Rick Warren as Pastor is simple and straightforward.

- Saddleback church will invite you to attend classes 101 to 401 (Belong, Grow, Serve, and Share).
- The importance of small groups and being in a community is shared.
- The opportunity to join a small group is available.

- Daily living is establishing critical habits in life. Slowing down the busyness by learning how to develop a daily time with God and bible study is encouraged.
- To volunteer, sign up for a one-on-one with a S.H.A.P.E. coach to find your perfect match.

Jay mentioned that for new believers at Saddleback Church Online who provide their email address:

- A confirmation email goes to them and outlines the next steps.
- A one-of video training follows this.
- Volunteers follow up with them individually.

Engagement for Multiplication:

Another set of content for nurturing contacts for spiritual formation is needed to turn a “contact” into a church member who is committed to inviting others to a Christian journey. It is a different nurturing journey that requires a different set of digital assets.

Clarity of your church’s content rollout strategy helps decides which content goes out and how to track it in your CRM.

- a. iChurch Online Call To Action (CTA) - Retention or Multiplication?
- b. YouTube content - Retention or Multiplication?
- c. Webinars and eBooks - Retention or Multiplication?
- d. A good website focusses on outsiders and generating leads - Retention
- e. App and Learning Management System concentrates on core attendees - Multiplication

CRM Engagement Dashboard: Do you have this data available?

1. Does your church have a clearly defined multiplication journey?
2. How many people are on your retention nurturing journey?

3. How many people are on your church multiplication nurturing journey?
4. When was the last time your team met to create content for the multiplication journey?
5. Are your attendees going through the multiplication journey and inviting others to come to the church?

Here are the stats concerning the denomination that I belong to:

- 68% of our churches are less than 100 people (720 of 1055 churches).
- Just under half or 46% of our churches are 50 or fewer people (487 of the 720 churches).

Imagine that your church is one of the 68% of the churches with less than 50 people. If 50% of the attendees were on the Engagement for Multiplication journey, you would be expecting the church to grow from 50 to 75 people, or intentionally plan for 25 newcomers.

Here are two reasons why I am not ashamed to talk about church growth, automation, and marketing:

1. There are approximately nine times more people now that had not heard the good news as to when Jesus was on earth.
2. Every day we have 138,000 more people die without the saving knowledge of Jesus.

We need to attract online and invite people to genuine human interaction. We need to understand how to make our onsite attenders and online prosumers eventually become committed multipliers. We are fishers of men, which includes the online net!

LAST 90 DAYS AS AN EXECUTIVE LEADER

“As hard is it to build a successful organization, it is impossible to transition successfully.” - Jack Welch.

The first ninety days of joining a church is a template for the last ninety days before leaving a church. We only occupy a temporary position in any church. Working at the church is similar to the life cycle of a flower. The flower blooms, fade, and another grows in its place.

Most people hate dandelions. The scientific name of the dandelion reminds me of why Executive Leaders are like this flower. The Greek word “taraxos” means disorder, and “akos” means remedy. We serve to bring remedy to the disorder. Some curse dandelions as a weed and try to mow them down. Yet, it takes just one dandelion to take root and cover the entire lawn.

The goal of an Executive Leader should be to envision how they would like their last ninety days at the church. The hallmark of your leadership is evident in three areas:

1. Work ethics: Character and commitment to excellence.
2. Tasks: The impact of the annual rollout of a Balanced Scorecard with internal metrics.
3. Relationships: The way you handled conflict management to build your team and create a healthy culture at church.

Leave without controversy. Leave the church in a better state than what you inherited. It is a commitment that you make with God. If you follow this guideline, you will leave a healthy legacy.

“But my life is worth nothing to me unless I use it for finishing the work assigned to me by the Lord Jesus – the work of telling others the Good

News about the wonderful grace of God.” – Acts 20:24

Put Your Ego Aside – You Are Here To Serve

I have often wondered what is meant by “*because of the crowd*” in Luke 19. Jesus entered the town of Jericho. Zacchaeus could not see Jesus “*because of the crowd.*” We are the ones trying to get closer to Jesus. We are the ones trying to serve Jesus. It takes humility for a leader to accept that we may be the crowd blocking what needs to occur. We fail to see the risk the church may face because of us.

Executive leaders may face opposition and criticism. Executive Pastors need to keep up with technological change, innovate, and focus while not experiencing instant results.

As we put aside our ego and serve faithfully, may we remember that it is not about getting applause and credits. We need to continue doing what God has called us to do.

Finally, the day comes when we need to leave the place where we have labored. What we leave behind is a legacy that comes out of weeks, months, even years of doing the small things, of serving behind-the-scenes most faithfully. Take comfort in the words found in Matthew 25:21 (NLT):

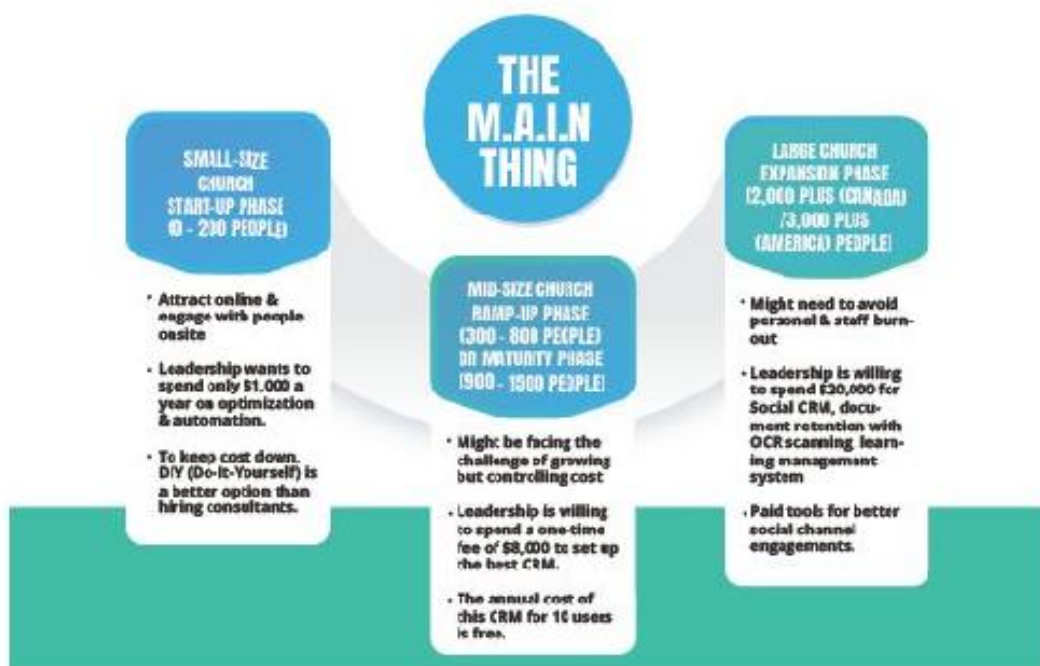
“The master was full of praise. ‘Well done, my good and faithful servant. You have been faithful in handling this small amount, so now I will give you many more responsibilities. Let’s celebrate together!’”

Our journey from the first ninety days to the last ninety days is an act of worship demonstrated in both our words and actions. The final reward that we will receive will be from the lips of Jesus Himself. And in the end, that is what matters.

The M.A.I.N. Thing – Next Step is Self Assessment

“Where success is concerned, people are not measured in inches, or pounds, or college degrees, or family background; they are measured by the size of their thinking. How big we think determines the size of our accomplishments. Remember, the main job of the leader is thinking. And the best preparation for leadership is thinking.” - David Schwartz, The Magic of Thinking Big.

This book is for any church leader interested in helping their church grow, optimize, and automate. Based on the size of your church, your leadership mindset, your team's skillset, you can select the toolset. I will bring it down to the M.A.I.N. thing. It is an acronym that stands for **Money, Automation, Implementation Team, and Need Right Technology.**



M = Money

The money and time you want to spend on solving your problems will be different from other churches. There is no right or wrong answer. The toolset you pick is dependent on how much money you are willing to spend on CRM and platforms that help you organize for growth, optimization, and automation. It depends on the value this brings to you in your context.

A = Automation Mindset

We embrace automation as it gives us a better return on time and the resources that we have available to us.

Your team has to travel from here to there. You can decide on the mode of transport. You can walk, take a bike, go in a car or a plane. All four modes of travel will take you towards your destination. The pace of progress will be different. CRM is your leadership choice that determines whether you are crawling, walking, jogging, or running.

I = Implementation Team (Skillset of F.R.I.E.N.D.S.)

Everyone knows something needs to change. There is a lack of understanding of what needs to be done. F.R.I.E.N.D.S. can help. What is their strength? What is missing?

N = Need Right Technology (Toolset for automation and optimization)

As a leader, you need to be aware of the bottlenecks that exist in the system. You need to select the right toolset. Your ability to carry out a self-assessment is the next step.

- Church Relationship Management (CRM) is the system of records that offers data integration and automation of processes.
- Front End: Providing a better customer experience and communication.
- Limitation of skillset (F.R.I.E.N.D.S.): Your team's technical expertise is needed to keep pace with the ever-changing landscape.
- Clarity around content delivery and leadership development system is essential.
- Marketing plan and digital assets.
- Process improvement in how you manage volunteers, office staff, finance, facilities, I.T. & compliance.
- Budget (money concern): How much can you spend on staff and technology?
- Strategic Planning: Assessment of your church ecosystem to identify areas of improvement.

Self Assessment of Your Church Ecosystem:

Understand your KPI - Key Performance Indicator:

What will be the measure of success that will prove that you have achieved what you want? = Quantifiable success metrics (Time, Money & Outcomes).

S. No.	Operational Needs	Solution	Customer Front End Experience	Internal Backend Responsibility

System of Records

1	Church System of Records (CRM) for Newcomers, Recruitment, Membership Database, & Marketing.	Different administrators think of CRM differently: Customer Relationship Management (CRM), or Donor Management System, or Marketing Platform like HubSpot, or Hospital Management System, or even the good old Excel with multiple lists floating around is also in use.	Customers are responded in real-time. Frictionless Experience: Cases and Tasks created are automated follow up. Disjointed experiences and people falling through the crack are eliminated.	CRM Admin manages permission sets and data integration across all church platforms. CRM offers a 360-degree view of the customer. Ensures data is not living in silos. CRM Mobile App ensures better team buy-in and adoption.
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Front End: Better Customer Experience & Communication

2	Phone System.	The phone system needs to be integrated into your CRM.	Disjointed experience is removed.	The backend team can see all communication taking place with people inside the CRM.
3	E-mail Communication.	Free: Mail Chimp. Paid: For larger churches, you can continue using Mail Chimp or go for another paid platform visible from inside your CRM. For larger churches, Salesforce Pardot (or Marketo) for omnichannel, tracking, grading & dynamic content may be necessary.	Church communicates to people on their individual communication preference. Move between email & texting seamlessly.	The backend team can see all communication & respond to people from inside the CRM. CASL/GDPR compliance is easy.

4	Text Messaging.	It needs to be integrated into your CRM.	Church communicates to people on their individual communication preference. Move between email & texting seamlessly.	The backend team can see all communication & respond to people from inside the CRM. STOP to text messaging is easy to manage.
5	Chatbots.	It needs to be integrated into your CRM.	Communication on phone, email, text, or chatbot is all integrated.	The backend team has complete visibility in the CRM of all communication taking place related to individuals.
6	Online Forms, along with Pre-Filled Forms.	It should eliminate data entry and integrated into your CRM.	Pre-Filled forms make people avoid filling up the same information again. It is easier and a time saver.	Data once collected does not have to be requested again as it resides in the CRM.
7	Legal Documents & E-Signature for parental consent, waivers, employment letter, Board minutes.	E-signature provides a better experience.	Manual signatures and physical forms are eliminated.	The process is automated & the CRM dashboard shows the team who has not submitted e-signed consent, waivers & documents.
8	Online & Text Giving.	Donation Platform.	Better customer experience.	It is seamlessly tied to the finance platform &

				CRM reports & dashboards.
9	Events: Registration & Check-In.	Brushfire or Eventbrite Pro for multi-user login, or Planning Center (PCO).	Both registrations, paid or free events, and check-in is a seamless experience.	Multiuser login allows Pastors to see registration reports. The administrative team does not have to spend time generating reports for the Event organizer. New leads are integrated into automated follow-up and digital nurturing.
10	Small Groups.	Planning Center (PCO).	Easy for people to join small groups.	REST API integration to CRM makes the follow-up & automation part of the connected ecosystem.
11	Church Kiosks.	For better Guest Experience.	The front-end start of a digital journey is easy.	Eliminates backend data entry. Automated follow-up with a 360-degree view of people's journey is a time saver.
12	Online Appointment Scheduling App.	For better Guest Experience.	The front-end start of a digital journey is easy.	Follow-up is easy and integrated into the CRM for further automation.

13	eCommerce.	Is the church selling products online?	It needs to be easy for the customer.	It should cover product promotion, mailing, backend logistics, & sales tax requirements.
14	Church Website.	Smaller churches need to have it designed on a platform where updates can be managed internally without compromising quality. Word Press with Elementor Pro is an option. Lead generation from the website needs to be integrated into CRM & automated follow-up.	Needs to be able to communicate in 3 to 12 seconds about “what is in it for me” and offer easy “Next steps.”	Managing updates should not be an expensive exercise. For the smaller church, a solution should be available for a one-time payment of \$1,000. All Call To Action (CTA) needs to be tied to automation, digital marketing & CRM.

Content Delivery & Leadership Development System

15	Church App.	Depends on the content rollout strategy.	If you don’t remember anything else from this book, remember this one line: <i>Those who do not understand the online subscription model will be wiped out as content providers.</i> CRM, automated digital marketing, and your content delivery strategy are three critical discussions as you organize for growth and optimization.
16	Learning Management System (LMS).	Integrated to your CRM.	
17	YouTube Channel or Evergreen Webinar or Zoom Platform.	Depends on the content rollout strategy. Lead generation needs to be integrated into your CRM & automated follow-up.	
18	The podcast as part of Sermon Delivery System.	Depends on the content rollout strategy.	

Marketing & Assimilation System				
19	Social Media Management Platform.	Social media channels, along with Facebook Business Suite, Buffer, & Hootsuite. Social CRM: Social channels integrated into your CRM (for larger churches, Sprinklr for digital customer experience may be necessary).	CRM, automated digital marketing, and your content delivery strategy are three critical discussions as you organize for growth and optimization.	
20	Landing Page, Lead Magnets (Digital Assets) & Lead Management.	Lead generation integrated to CRM & automated follow up.		
21	Digital Content.	Canva or others.		
22	Surveys & Polls.	Depends on the content rollout strategy. Lead generation integrated to CRM & automated follow up.		
23	Digital Marketing Platforms.	Depending on the scope of digital marketing/YouTube/ Google Ads campaign the church carries out. Google analytics, and other tools to manage Hashtags, and will require SEO & SEM.		
Volunteer Management				
24	Sunday Services and Volunteer Scheduling.	Planning Center (PCO). Built on REST API. Needs to integrate to Salesforce CRM.	Easy for volunteers to sign up, schedule, communicate & renew.	The process to be automated to save time. Integrating it with CRM helps with a single view of the customer.
Tech Ministries				
25	iChurch Online setup.	Online platform setup needs to cover a video player (streaming provider) live Chat feature that allows you to chat in the public	One size does not fit all. It needs further discussion based on your Senior Pastor and Tech	

		area and chat with a user in a private room scheduled timings to stream with live chat and broadcast as needed a notes tab so visitors can take notes during the service and email the notes to themselves or their friends an area to connect and respond calendar tab shows the time of all the services social media integration – so you can Tweet, etc.	Ministries’ vision, along with automation and digital marketing strategy.
26	Church Tech Ministries Requirements.	Audio, light, video, & video projections.	One size does not fit all. Needs further discussion based on the vision of your Senior Pastor and Tech Ministries lead.
Office Staff & Improvement Management			
27	Team Collaboration Platform.	Team collaboration tools should cover event planning, team task tracking & status, benevolence tracking, staff notices, team communication, and folders that allow multi-users to work in real-time.	Goal: Reduce email-based back and forth related to team planning & communication.
28	Church Event Calendar.	Cloud-Based.	Everyone on the team needs visibility on all events & church services taking place at the church.
29	Office Email System.	Cloud-Based – Office Suite (Google workplace, Microsoft 360, Apple environment, etc.).	Even when you utilize a Team Collaboration Platform, your team still needs an office email system. It is now available cloud-based and at little to no cost. Are your CRM and Info HelpDesk emails integrated, so that customer data is not living in silos?
30	Human Resource Management System, including Vacation Approvals &	Cloud-based.	Eliminate the manual. Automate this process.

	Performance Management System.		
31	Live Dashboard and Reports.	Part of your CRM. You can also use both Salesforce-Tableau CRM or Power BI for Data Visualization.	If your team has to create reports, your team is wasting valuable time. When the CRM brings all the data together, you enjoy the benefit of live reports and dashboards. The keyword is “live” – available at a click of a button.
32	Process Improvement Workflows.	Visio (Figma for website mock-ups).	With automation and optimization, your desired future state will be different. Where would you like to be a year from now? What is the value you are putting into this? The money & time you spend on your problem is a creative act. Automation will eliminate the manual process. Your future state (after automation) needs to be part of your documented process improvement workflow so that team members can discuss and communicate process change in a visual format.
33	Document Retention with O.C.R. scanning.	It needs to be integrated into your CRM as a system of records for all documents also.	You might be facing three realities: 1. Documents are kept in a disorganized way. 2. Documents are kept manual. Without O.C.R. scanning & a retention platform available in your CRM – your team spends hours trying to find documents or the latest version of documents. 3. Platform must provide an automated workflow and Governance around purging control, GDPR audit trail, etc. If your CRM does not offer you

			this – you are not using an electric car. Change your CRM.
Information Technology (I.T.)			
34	Cybersecurity.	It needs further discussion as one size does not fit all.	One size does not fit all. It needs further discussion.
35	Data Storage & Backup.	It needs further discussion as one size does not fit all.	
36	Data Integration Tools.	It needs further discussion as one size does not fit all.	
37	Mobile Device Management (MDM) Platform.	For managing multiple church iPads & Apple devices.	
Finance, Approval & Reporting System			
38	Finance – Accounting Platform.	Accounting platform that is integrated into your CRM.	One size does not fit all. Needs further discussion. Depending on the size of the church, this can go from a simple Quick Books to the digital transformation of your financial & reporting system, along with automated workflows for approvals.
39	Payroll.	Inhouse or Outsourced.	
40	Expense Approvals.	Automated and Online.	
41	Purchase Approvals.	Automated and Online.	
42	Financial Reports and Dashboards.	Power BI or Tableau will take care of this requirement also.	
43	Tax Receipting Process.	Email Delivery, Print Delivery, or both.	
Facilities			
44	Facilities & Bookings.	Planning Center (PCO).	One size does not fit all. Needs further discussion.
45	Church Security & FOB System.	Cloud-Based.	
46	Emergency Preparedness: Lockdown Communication System.	Based on the church lockdown process. (Unfortunately, many churches do not have an identified lockdown process.)	
47	Asset Inventory & Equipment	Part of your CRM & Document Retention, along with	

How To Get More From This Book

Here are seven ways in which you can get more from this book:

1. Sign up for a FREE offer: Strategy session training is available at www.amitabhsingh.com
2. Sign up for the “Ask Amitabh Community,” where like-minded church leaders can connect and ask questions specific to their church context.
askamitabh.online/forum
3. Read the weekly blog “Singh on Mondays” about Organization Leadership, Church Growth, and Marketing at askamitabh.online/blog
4. Follow the “Ask Amitabh” YouTube Channel, with tips and resources on how to optimize & automate for growth - askamitabh.online/youtube
5. Other books available on my amazon askamitabh.online/books: The New Normal of Leadership; Jesus: The Ultimate Management Guru; Round Pizza In A Square Box; and Chilies In An India Curry
6. Sign up for “The Innovation Gap Course.” Available at www.amitabhsingh.com
7. Free Cybersecurity training for church staff is available at www.amitabhsingh.com

Please feel free to Ask Amitabh:

I welcome your questions and thoughts. Share your journey, the tools you use, and the success or failure that you have faced. Though I am not able to respond to every communication immediately, I try my best to respond at the earliest. You can contact me on my website: www.amitabhsingh.com

Thank you for taking the time to read this book. Your next step starts with one word:

Change!

GLOSSARY OF TERMS:

404, 301, and 302 Errors

404s error takes place when a page is deleted from a website. You will get a “Page Not Found” message. Redirects, such as 301 redirect, 302 redirects, help the team maintain the PageRank and SEO reputation you have earned through backlinks and traffic.

Algorithm (Google’s Panda/Penguin SEO algorithms, TikTok algorithm)

It is a complex set of rules search engines and social media channels use to choose which content a user sees first. Keyword bidding, ad relevance, and search engine optimization on the website are some of the factors that need to be taken into account as part of digital marketing.

A/B testing

It is also known as split testing, which compares two versions of a web page or email against each other. Random users check it to determine which variation will perform better in digital marketing.

A.I.: Artificial Intelligence

A field of computer science dedicated to computer software making intelligent decisions, reasoning, and problem-solving. Machine learning is a sub-field of artificial intelligence.

Backlink

It is an incoming hyperlink from one website to another. Having a large number of backlinks can help with the Search Engine Optimization of your website.

Balance Scorecard

Since the 1980s, the Balanced Scorecard has been one of the best strategic management tools. It was originally designed by Dr. Robert Kaplan and Dr. David Norton from Harvard. Dr. Kaplan is the Baker Foundation Professor

at Harvard Business School. Dr. Norton is the founder and director of the US-based Palladium Group.

Brushfire.com

You can read more about churches using brushfire.com at:

Hillson Church: <https://www.brushfire.com/case-study/hillsong-church/>

Gateway Church in Texas: <https://www.brushfire.com/case-study/gateway-church/>

Prestonwood Baptist Church: <https://www.brushfire.com/case-study/prestonwood-baptist-church/>

CASL: Canada's anti-spam legislation

Church administrators will have to be mindful of federal law dealing with spam and other electronic threats. The general requirements for sending an electronic message to an electronic address must be cognizant of obtaining consent, providing identification information, and providing an unsubscribe mechanism.

COPPA (1998): Children's Online Privacy Protection Act

COPPA is a U.S. federal law designed to limit the collection and use of personal information. It imposes certain requirements on the operators of Internet services and websites that have actual knowledge that they are collecting information online from a child under 13 years of age.

CRM: Customer Relationship Management or Church Relationship Management

CRM system or CRM platform is used to track relationships and engagement with existing church attenders and potential leads. Salesforce CRM is my personal bias.

CRO: Conversion Rate Optimization

CRO is all about continually improving your website or landing page's capacity to convert visitors into leads or church attenders. It is about understanding what users are looking for and delivering it online to attract their attention and built trust.

CSS: Cascading Style Sheets

A code language for defining the visual presentation of a webpage. It is a simple mechanism for adding style such as fonts, colors, spacing to Web documents.

CTA: Call to action

Call to action is presented as direction commands and action phrases. These are captivating buttons, banners, or hyperlinks for digital visitors to click on. Examples of popular calls to action are “Sign Up Now,” “Donate Now,” “Download Here,” and “Learn More.”

Evergreen webinar

“Evergreen” is used in the context of “evergreen content.” Evergreen webinars are online seminars that are automated instead of live. The Evergreen webinars can withstand the test of time. They offer digital content is built on a “set it and forget it” marketing strategy. The goal is to generate leads and engagement that are part of a customer journey.

GDPR: General Data Protection Regulation

Churches are offering Online iChurch that takes the message beyond its border – EU included. Church administrators will have to be aware of GDPR regulation in EU law on data protection and privacy in the European Union and the European Economic Area. It also addresses the transfer of personal data outside the EU and EEA areas.

Google Ad Grants

It is a pay-per-click online advertising platform that allows advertisers to display their ads on Google’s search engine results page. Based on the keywords that a church wants to target, the church utilizes Google Ad Grants that help them share their cause with the world. Qualifying non-profit has access to up to USD 10,000 per month of search ads shown on Google.com.

HTML: Hyper Text Markup Language

It is the language used to create all websites.

JHSC: Joint Health and Safety Committee

In Ontario (Canada), a workplace with 20 or more employees must have a JHSC made up of at least one worker and one employee member. The focus of the committee is to assist in resolving worker health and safety

complaints. Promoting and monitoring compliance with health and safety regulations in your country and region is part of church administration.

LMS: Learning management systems

Content delivery platform used for online learning, creation of training materials, and eLearning. LMS is a reasonably sophisticated platform that allows for better user management, automation, gamified content, and digital learning.

MoSCoW Technique

MoSCoW technique, also known as MoSCoW method, is a popular prioritization technique for managing requirements. The acronym stands for four categories: must-haves, should-haves, could-haves, and won't have.

NAP: Name, Address, Phone Number

NAP is critical for churches wishing to rank well in the local organic search results. Search engines like Google take the data into account when determining what to show for geo-targeted searches. The NAP for your church needs to be correct and consistent when optimizing your website and online presence for local search. Google values accurate information.

O.C.R.: Optical character recognition

A visual recognition process involves photo-scanning text characters to better manage documents through their life cycle from creation to final disposition.

Omnichannel

Multichannel approach to communication covering seamless interactions across multiple online and onsite touchpoints – desktop or mobile device, by telephone/voice, email, web, chatbot, kiosks, or in a brick-and-mortar (onsite) location.

PPC: Pay Per Click

PPC is a form of digital media marketing where the advertiser pays a fee every time their ad is clicked by a user online. Businesses and organizations have moved to online paid advertising to drive more traffic to their websites.

PIPEDA: Personal Information Protection and Electronic Documents Act (PIPEDA)

PIPEDA is a Canadian law relating to data privacy. It governs how organizations collect, use and disclose personal information in their communication and business. According to the University of Maryland, a cyberattack occurs every 39 seconds. Laws around data protection regulation are not going to become any easier in the coming years.

RACI/RASCI model

RACI or RASCI are often used interchangeably. RASCI is an abbreviation for

R = Responsible – who does the work

A = Accountable – who is responsible for the task

S = Supporting – who provides support during the implementation

C = Consulted – who are the people who need to give input before the work is signed off or done

I = Informed – who are to be kept in the loop about the progress or the decision

Ranking Method

The Ranking Method is one of the simplest ways of ranking goals or performance evaluation. In this method, you can rank goals in order of importance, or rank employees from best to worst in a department. It is an effective method in goal setting. Using this for performance evaluation comes with the drawback of ranking a person on the team as “worst.”

SEM: Search engine marketing

It refers to paid marketing done on search engines. Churches utilize Google grants or pay to show up for specific keywords. SEM is also referred to as paid search or pay per click (PPC). It is a digital marketing strategy used to increase the visibility of a website in search engine results pages (SERPs).

SEO: Search engine optimization

It is the practice of optimizing the website to rank higher in the organic search results of Google.

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Rachna Singh (my daughter)
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Thank you for your input and contribution to this book.
To those who live with me,
I am sorry for messing up the living room
with my writing materials
and whiteboard!!!

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Nothing that I am offering can replace or substitute the services of trained professionals in any field, including, but not limited to, financial, medical, psychological, or legal matters.

END NOTES

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ASK AMITABH: ORGANIZING FOR GROWTH AND OPTIMIZATION

Change is inevitable. Learning to grow during change is a choice. I will help you take advantage of both.

Have you been thinking about increasing attendance or revenue, decreasing cost, managing risks, creating a frictionless experience, and avoiding personal burnout? Now is the best time to organize for growth.

I am not offering expensive consultancy or pushing other people's platforms. I am part of church administration and have been there with you. I have the t-shirt. I am happy to share personal knowledge, experience and reveal bruises that have been picked up along the way so that together we can serve the capital C – your Church or Charity.

As a leader, I believe in the renewing of the mind. Your mindset is the foundation for further developing the skillset and toolset that you need. Innovation is embraced when resources are scarce. If you have only \$1,000 to spend – there are solutions out there to make things better. No budget is too small.

Change to us is like oxygen in our body. You can have the best preacher. You can have a great church, but if your administrative team is not organized for growth – we miss it. I have offered some ingredients in this book. Your church needs a specific recipe.

I can help you discuss the right CRM, automation tools, branding, website for lead generation, creating front-end guest experience, and structuring the church for growth.

Consider the following:

- Church strategy.
- CRM – Your system of record that offers automation, AI, learning management system (LMS), social CRM, document retention with

O.C.R. scanning, reports and dashboards, risk scoring, and compliance.

- Email and text messaging – omnichannel journey and engagement.
- Online Forms – For Information and waiver (eSignature and pre-filled form).
- Social media channel for awareness and building an online community.
- Digital Kiosks and church App for better guest experience.
- Online giving.
- Content and marketing strategy.
- Live Engagement Reports and Dashboards.
- Discovery audit and implementation roadmap: How to manage change?
- Budget: Skillset cost and the right toolset: The M.A.I.N. thing.

I am an author and an online educator. I serve as an Executive Pastor in Greater Toronto Area (Canada). I help Pastors and Charity leaders to optimize and save time (automate). I also serve as an adjunct faculty at Master's College and Seminary (Canada), where I teach Administration and Finance. I am passionate about helping church leaders select the right CRM tool to pursue excellence and change lives.

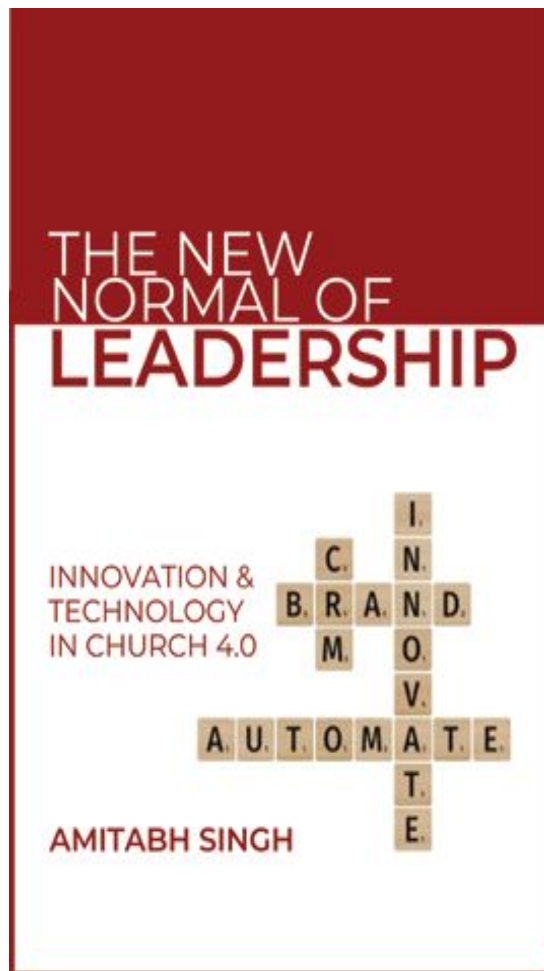
I have worked in various positions and as hospital CEO, Director of Finance, fundraiser, Executive Director, and have hosted over 300 television programs for CBN host. I appreciate hearing what God has put in my heart for your church administration.

For further questions and discussion, you can always reach out to me on my website and Ask Amitabh.

Bonus: Strategy Session training is a complimentary offer available to you on www.amitabhsingh.com

ALSO BY THE AUTHOR

Available at askamitabh.online/books



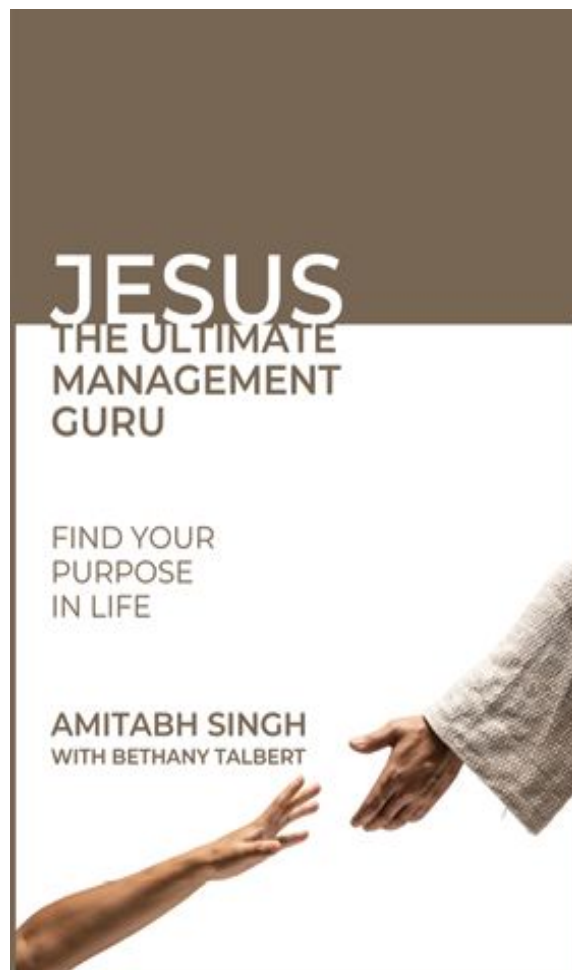
The New Normal of Leadership: Innovation & Technology in Church 4.0

Amitabh Singh's book is a treasure of equal value. Page after page dispenses practical, relevant, scalable solutions designed to fit churches of every size, context and budget. This book was forged in the cauldron of day-to-day situational realities that church leaders are forced to address. Having worked side-by-side with Amitabh for nearly ten years, I can personally attest to this fact. Under Amitabh's expertise and guidance as

Executive Pastor, PORTICO became a working laboratory where the insights and principles presented in this book were tried, tweaked, improved, and proven. *The New Normal of Leadership* is the consummate guide on effectively blending leadership, administration, technology, and innovation for the singular cause of helping people find their way back to God.

Leadership in the local church is not for the faint of heart. My father was a pastor, I am a pastor, and I know from first-hand experience that effective leaders must learn to master the complexities of leadership and administration. *The New Normal of Leadership* will help you bridge these two worlds together as you lead in this new era of Church 4.0. The work is hard, but the rewards are unrivaled.

Douglas Rhind
*Teaching pastor of PORTICO Community Church
Mississauga 2021*



Jesus: The Ultimate Management Guru

Born into a businessman's home in Kolkata, India, Amitabh Singh became increasingly interested in the art of business management. When he was introduced to Jesus at a young age, Amitabh found that the teachings of Christ fused his love for business and people. We invite you to join as Jesus, the world's ultimate management guru, teaches us how to navigate best and manage our workplaces and how to prevail in the vast marketplace of life.

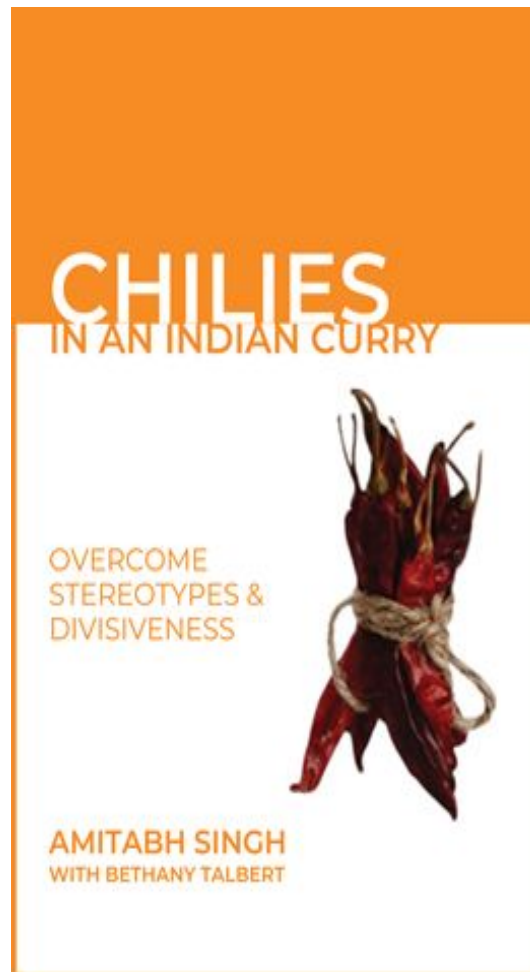
Round Pizza In A Square Box



India is an ever-evolving country. While democracy inspires innumerable achievements in the arts, education, technology, and business, in rural and impoverished India, the gulf between the rich and poor grows increasingly wider. Amitabh Singh in *Round Pizza In A Square Box* shares several hard-learned lessons that have inspired him to over 30 years of service on behalf of India's impoverished men, women, and children. His message encourages even the most distant reader, showing that they too can make an immeasurable difference in this world with the right mindset and a strong does of compassion.

Amitabh is committed to providing education to children with little or no access to education. He continues to volunteer with Mukti Volunteer Village (www.muktivillage.ca). You, too, can support this Canadian charity by donating \$18 towards Amitabh's effort to provide access to online education to children from disadvantaged backgrounds.

Chilies In An Indian Curry



Contrary to popular belief, the chili did not originate in India. An Indian woman acquired it from Portuguese traders and when she mixed it into her Indian curry, and the curry became even more delicious. In *Chilies In An Indian Curry*, Amitabh Singh recounts his childhood in India. He experienced the richness of its spiritual, economic, and social history, along with its wounds and prejudices. This evocative and poignant memoir invites readers to overcome stereotypes and divisiveness and instead receive the chilies that can only make life's curry more satisfying.

A gift idea for your Indian friend: This could be a good gift for your Indian friend who will enjoy reading the story in his much loved Indian context.

Also available on Ask Amitabh website:

www.amitabhsingh.com

THE INNOVATION GAP COURSE

The Innovation Gap is an eight-week online course.

Several times a year, I open enrollment for The Innovation Gap. This 8-module online course offers a Do-It-Yourself (DIY) roadmap that teaches you how to carry out a self-assessment and design a strategy that works best for your church. I cover everything from digital rhetoric to content and growth strategy. As a church leader, I want you to understand the principles of entrepreneurship while finding an affordable solution and creating a frictionless experience. I dive even deeper into how to make marketing, technology, and innovation work for your church. I discuss building a connected ecosystem while removing administrative hassles and saving both time and money.

Why The Innovation Gap course?

It is time for you as a leader to innovate and organize for growth. One size does not fit all. You don't have to copy what others have done. Your innovation strategy needs to be specific to your context.

What's different about the Innovation Gap?

The Innovation Gap is an 8-module online commitment. Amitabh has designed this online course for church leaders. It allows you to connect and develop an innovation strategy that is true to your mindset, skillset, and toolset.

What is the Ask Amitabh community?

Online private Facebook Group where like-minded church leaders can connect and ask questions specific to their church context.

What will you learn?

The Innovation Gap course provides clarity, strategy, and a healthy growth mindset to church leaders.

1. Strategy is everything
 - a. Strategy: What You Do?

b. Tactics (Execution): How Do To It?

2. Principles from Entrepreneurship for Church leaders
3. How to build a Church Connected EcoSystem?
4. The Business Side of Things: Mindset, Skillset, and Toolset
5. Psychology: How to understand consumer behavior for better engagement?
6. Digital Rhetoric: Art of writing and speaking in the 4th Industrial Revolution
7. Content & Growth Strategy
8. Communication Design for a Healthy Church: Marketing, Technology, & Innovation

What is the time commitment?

You can study in your own space. For eight weeks, you will be able to connect with Amitabh and ask questions specific to your context.

Free Cybersecurity Training for Church Staff

Find out more about online training at

www.amitabhsingh.com.