

# WHAT TO EXPECT

## WHEN IMPLEMENTING

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### WELCOME TO AN EXCITING JOURNEY.

The mission of the Potomac Conference is to build healthy, disciple-making churches because we believe that the most influential organization we have for changing the world is a healthy, vibrant and effective local congregation.

It is for this reason that your Potomac Conference coaching team is looking forward to partnering with you to put powerful tools into the hands of members and leaders for the purpose of becoming more effective in how we do ministry.

WeConnect is a project initiated in 2012 in an effort to find the very best ministry management solution on the market and put it in the hands of the local church at no cost to the congregation. This search resulted in a partnership with Church Community Builder, a Christian organization centered in Colorado Springs that is dedicated to helping churches develop a culture of healthy systems and deeper connections. On a bigger scale, WeConnect also involves increasing the level of connectedness between our churches with some exciting tools that will be coming in the future.

WeConnect supports good church processes, and more importantly, it includes a set of ministry tools that allow you to broaden your team of available workers and resources, improve communication, and empower your ministry leaders.

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# IMPLEMENTATION OVERVIEW

As you've probably noticed, WeConnect is about much more than one-size-fits-all online gadgetry. It is a robust, highly customizable leadership tool that will enable the church to create healthy systems and process.

We understand the implementation of any new system can be an overwhelming task, especially when you consider the many pressing needs involved in the daily work of ministry. Our goal is to offer structure and direction that can help you get your arms around the task ahead of you so you can quickly begin using tools that will help you achieve your goals.

This document is designed to help you think about what you will need to do for a successful implementation project. We will cover the following topics:

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## SOLUTION DESIGN

The first step is to understand a little about how the solution is designed in order to understand what is involved in implementation. It can be helpful to see a (very simplified) picture of the WeConnect\ solution itself in order to gain a stronger understanding of the order of implementation activities.

In the diagram, the boxes represent major sections of data or key church functions.

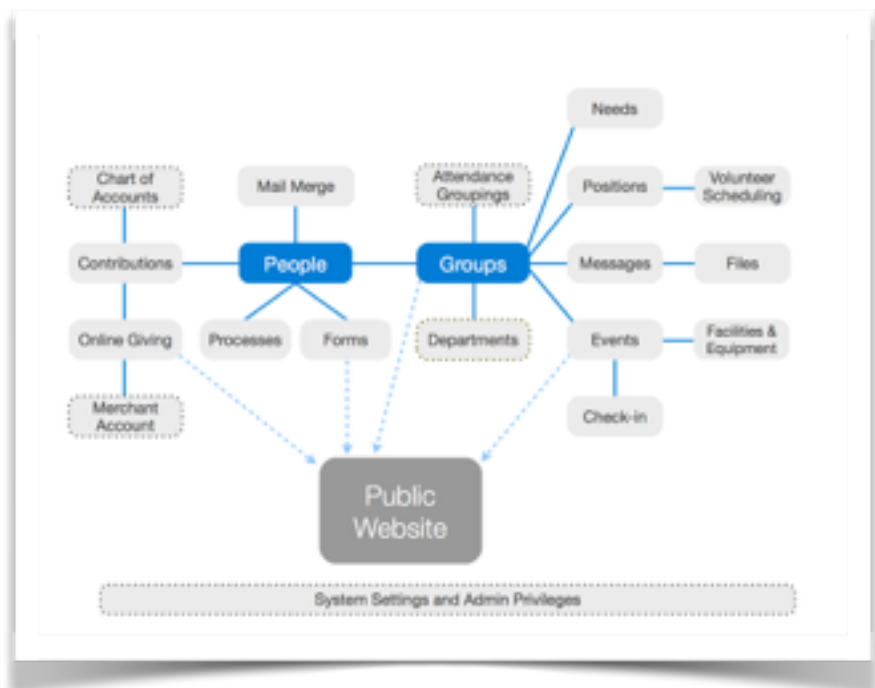
As you can see, the solution is centered on the People section of data. From there, People can be put into Groups, give contributions, or manage things like processes or forms. Online giving is a method of receiving contributions into the Chart of Accounts from members or the public, and it requires a Merchant Account with a provider like BluePay.

As a result, the implementation process starts with setting strategies for getting people data organized and making decisions about how it will be entered in the solution. The next most important piece of the solution is Groups.

Groups can belong to Departments and Attendance Groupings. Group members can hold Events, post Needs, or request volunteer Positions. Users can take attendance for Events, after the fact or through the Check-In feature. They can reserve Facilities & Equipment for their Events.

Additionally, many elements can be published to your Public Web Site, such as event calendars, group finder, and online giving. The API (Application Programming Interface), a tool that allows you to query the database directly and export that information to other applications, is not represented on this chart.

As an illustration of how this design impacts your implementation plan, if your primary goal is to implement the Check-In system, then that requires that you first have People (as leaders and members) inserted into a Group, which would create an Event, and that Event would belong to an Attendance Grouping. Even if child Check-In is the most urgent priority, these other elements become precursors to that section working successfully.



# THE PROCESS

The implementation process generally takes around six months to complete and follows four phases.

## Phase 1: Discovery

- Registration Form
- On-site meeting
- Gathering Implementation Team
- Discovery Packet
- Discovery Call

## Phase 1: Discovery

This is the phase you're in right now. It includes all the steps required to apply for implementation: Scheduling an on-site meeting with your Coach, gathering an implementation team, conducting your initial information gathering (Discovery Packet), obtaining a live instance of the software and having the first official coaching call (Discovery Call).

## Phase 2: Fundamentals

It's in this phase that your implementation team gets down to the business of learning and implementing the fundamental aspects of the solution. This is where the lion's-share of the up-front work will need to be done. As such it requires a commitment on behalf of an implementation team to be on a weekly conference call with the coach.

## Phase 2: Fundamentals

- System Settings
- Data Migration
- People
- Groups
- Financial Management
- Messaging
- Web Links and API's
- Leadership Launch
- Church Launch
- Mid-Project Review

## Phase 3: Advanced

- Guest Assimilation
- Ministry Team Management
- Processes
- Check-in
- Forms
- Key Performance Indicators
- Documentation
- Project Evaluation

## Phase 3: Advanced

As the project moves along it becomes necessary for fewer coaching calls and more time for the team to work on putting pieces of the solution into practice. As such we plan on bi-weekly call frequency during this phase.

## Phase 4: Leadership Coaching

During this phase it becomes most useful for the Coach to come alongside individual church leaders to provide one-on-one attention to help them meet their unique needs and goals.

Your coach will work with you to develop a custom implementation plan that will be designed to help you meet your goals and achieve a smooth implementation.

## Phase 4: Leadership Coaching

- Lead Pastor
- Financial Director
- Assimilation Leader
- Children's Ministries Leader
- Missions Director

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## GATHERING AN IMPLEMENTATION TEAM

Successful implementation requires a TEAM of people working together toward common goals. You will need to designate a leader for this team. This person will be known as the Master Administrator. This person will need support from people with the following attributes:

### ***Influence***

People with the authority and willingness to assign resources to meet deadlines, ensure a smooth transition, and drive cultural change among the church body as a whole. This may be the implementation team leader.

### ***Knowledge***

People who understand current church systems & processes and possess an aptitude to be the "local experts" with respect to WeConnect. Because of this, they will be responsible for training the rest of the leaders in the unique way the church uses the solution.

### ***Work***

People who will commit to completing the work involved in the installation and setup of the solution in each department as needed.

With these essential characteristics in mind, choose your team carefully. Consider having a minimum of four people on this team. We recommend assembling a team of key players and design a regular meeting time for the team to get together (face-to-face if possible) to review project status, challenges, questions, and decisions. It is often helpful to schedule your weekly consultation with your Implementation Coach at the end of this meeting so the team members can participate in the phone conference and be able to get any questions resolved.

It will be necessary for this team to have the required privileges to administer a smooth implementation. As such, they will need to have broad access to the information and features included in the solution. They will also need to have the necessary authority to make functional decisions on behalf of the church regarding how and what information is stored, how permissions to the solution will be organized and what certain processes of the church will look like in the future. Because of this, your implementation team will need to be voted into place by your church board when you submit your Discovery Packet (more about this in the next section).

In addition to the core team, we recommend setting aside a few minutes in the weekly staff meeting and/or board meeting for the implementation team to report to the church. This report can include progress to date, next steps, and help required. Necessary help or input might include decision advice, an answer to a strategic question, or help managing conflict between people or departments.

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## ON-SITE MEETING

As soon as you've gathered your implementation team, it will be time to schedule an on-site visit from your Potomac Conference Implementation Coach. The people that will need to be at this meeting include:

- All staff
- Board members
- Your implementation team
- Any church leaders not on the board (such as Sabbath School teachers, outreach project coordinators, small group leaders, etc.)

In this meeting we will present an overview of the purpose of the solution, go over the role of the implementation team, talk about the next steps in the process and answer any questions the church leadership may have at that point.

At the end of this meeting the Coach will also provide a **discovery packet** for the church to work through. This is an information gathering document that 1) gives the conference the necessary information to get the solution set up and 2) gets the implementation team the necessary information they will need to get their work underway.

***It is required that the Discovery Packet be reviewed and approved by a board vote before it can be submitted.***

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## DISCOVERY CALL

As soon as we've received your discovery packet, it will be time to schedule the first discovery call between the church's Implementation Team and your Implementation Coach. This will be the first of weekly calls in which your coach will assist in the following:

- Creating the initial draft plan and schedule based on your priorities and the architecture of the solution.
- This will include a Conference-level strategic plan and a church-level "template" plan to be applied to individual churches.
- Regularly update the project schedule based on current status.
- Provide accountability to the Conference and the Implementation Team for schedule and quality performance.
- Answer solution-based questions to ensure proper understanding.
- Provide process-based advice to promote optimal results in the church.
- Assist with specific obstacles that arise (technical, process, cultural, etc.)

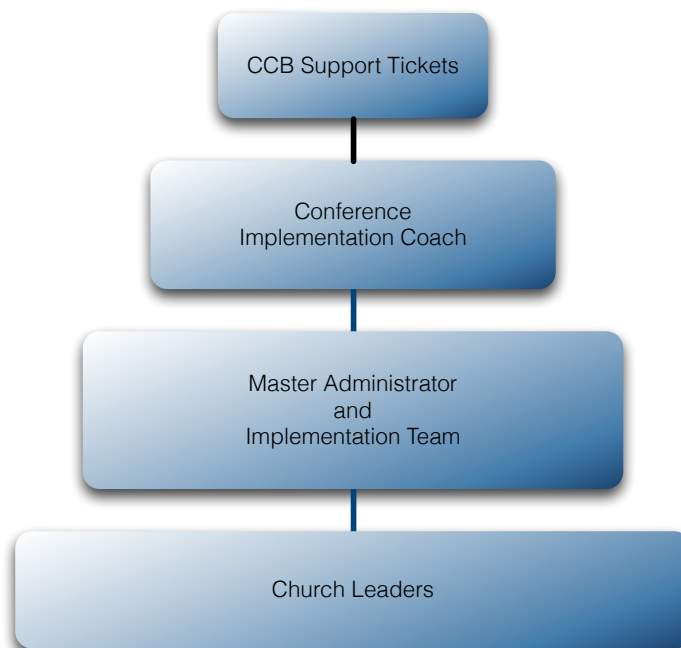
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## COMMUNICATION FLOW

Communication will flow between your Implementation Coach and your local church Implementation Team. This will primarily involve weekly coaching calls, but any questions the team may have can be posted to the Implementation Team group within WeConnect.

If need be, the Implementation Coach will be able to submit tickets for technical support directly to Church Community Builder in order to solve any technical problems that may arise.

The Implementation Team will then be the group that provides training and instruction to the rest of the church leaders on how to use the solution. In essence, it is their job to become the local experts with respect to WeConnect. They will also be the group that reports to the board and keeps the church informed about any changes in procedures that need to be made as a result of implementation.



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## THE NEXT STEP ON THE JOURNEY

Congratulations on taking advantage of an exciting opportunity for your local church. You are now implementing the premier web-based church management solution. We believe that this will quickly become the most important and useful evangelistic tool the church has access to. Your Conference team is excited to partner with you in doing everything we can to reach people for the Kingdom of God.

Your next step is to begin gathering your Implementation Team as you and your Coach schedule a time to conduct the On-Site meeting.

Please take this opportunity as a catalyst for change and take your churches to the next level of ministry by leveraging great technology.

Finally, please feel free to contact your Implementation Coach with any questions you may have as we get started:

Kosly Joseph

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(315) 706-1473  
[koslyj@pcsd.org](mailto:koslyj@pcsd.org)

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*May God bless your ministry as you equip God's people to do his work and build up the church,  
the body of Christ. - Eph. 4:11b-12*