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PLANNING CENTER:

Tools that turn touchpoints into discipleship

HI! WE ARE...

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Simple Strategic Shepherding

Scripture says we should do things **decently and in order** — not for control, but for care.

And Jesus is the kind of Shepherd who goes after the one. He doesn't just hope the one finds Him.

Planning Center helps us: **Consistently Care for People after Spiritual Moments.**

How We Got Here

The problem we were solving:

We had real spiritual moments — guests, decisions, care needs, group interest — but follow-up depended on:

- someone remembering
- someone being heroic
- or one overworked staff person

And that's not sustainable. It's also not shepherding — it's luck.

So we needed a system where:

- people don't get lost
- leaders know what to do next
- and ministry doesn't depend on one person's brain

The Framework

Front Door

How do people get on a discipleship on-ramp?

- Connect cards / forms
- New Decisions
- Group interest
- Care requests
- Kid check-in
- Serving interest
- Events

Planning Center helped us to create workflows to follow all these check points and more.

Back Door

What's our consistent follow-through process?

- Knowing who owns what workflow
- Always guiding a person to their next step
- How do we close the loop (we have built an "at risk" center that runs through our resourcing world - we offer prayer to someone when we notice they are disengaging)

The Tension We're Always Balancing

Wait and Respond

when people raise their hand - a workflow is created, we go after them.

Go and Get

when we notice drift or need, or disengagement.

Planning Center has helped us do both

Workflows

Here's the breakdown and a design of a very simple workflow that actually works:

01

New Guest

02

Triggers

(a form submission, tag, or Tap feature)

03

Owner

(who is responsible — a person, not 'the church')

04

Timeline

(when it happens — speed matters - response time matters.)

05

Touches

(text/call/email hierarchy and the use of automation)

06

Escalation

(when it needs more than a volunteer, we move it to a Care Workflow)

07

Close the loop

(make notes and make the next step happen, so we know it was done)

Workflows are people, not a task. **If they matter, they should have a workflow with their name on it.**

"New Guest"

"New Guest" Workflow

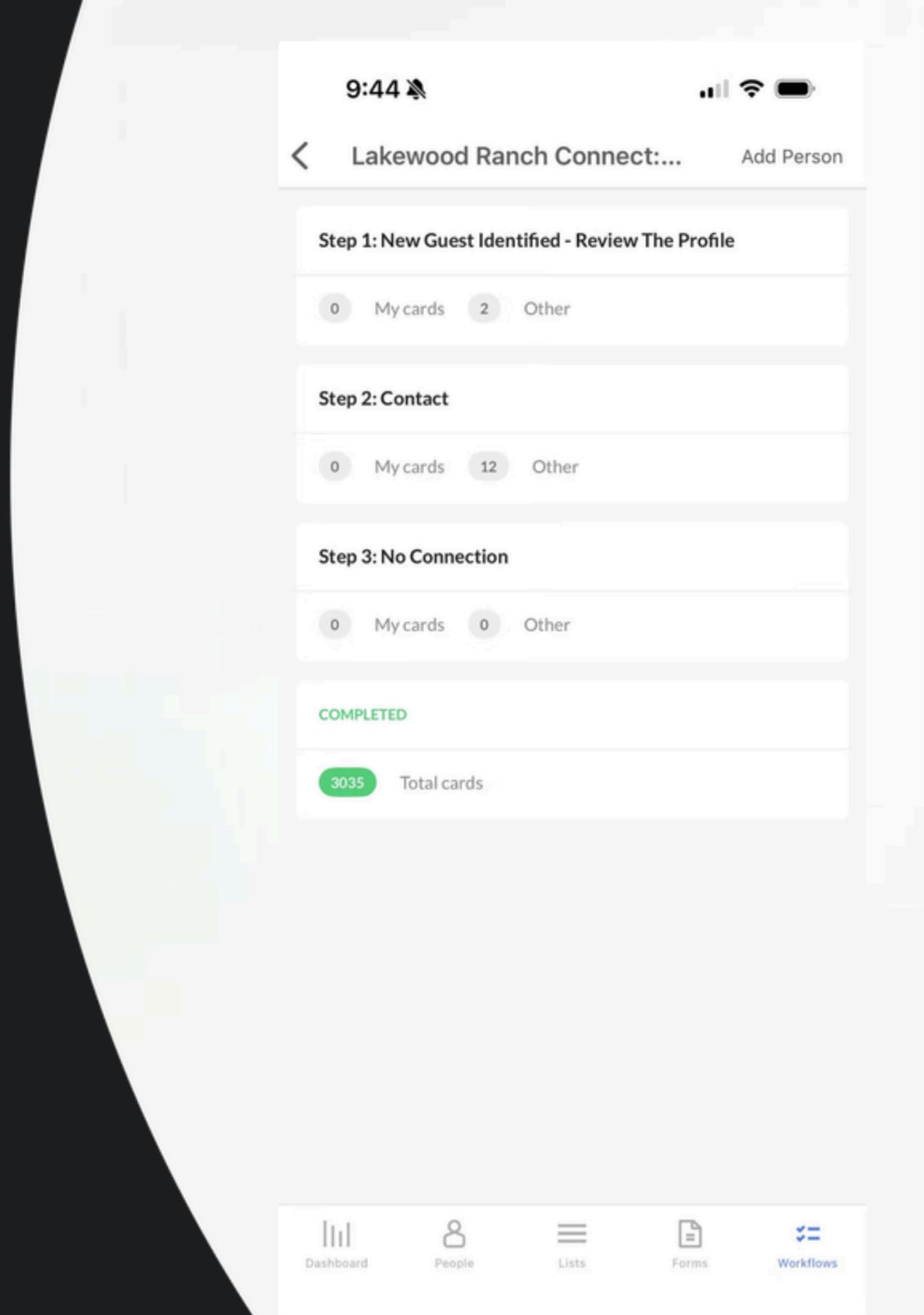
Trigger: a new guest submission via tap or card.

Then:

- a task is created
- a first-touch automated message goes out (warm, human with video)
- if no response, a second-touch happens to offer prayer
- We will then follow up on Monday with that person, personally.
- We then route them to their next step: Growth Track / Group / Serving
- We close it so the person doesn't stay in limbo

The win: every person gets care... not just the ones we remember.

The win: pastoral ministry becomes consistent and trackable — without becoming cold. We know the status of our flock.



Tips & Tricks

Automations

New guests + New decisions and coming soon our Dream Team
Questionnaire: Automations don't replace relationship — they start it faster.

Templates

Write them like a human.
Warm. Short. Specific.

Clearstream/SMS

SMS is great for speed and response. Calls are great for relationships. Email is great for detail. Use the right tool for the right moment.

Data Hygiene

Bad data breaks discipleship systems. Clean inputs create clean follow-through.

Planning Center for us is not about technology. **It's about shepherding.** It's how we turn moments into pathways — so people don't become invisible.

Q&A