

Conversation & Meeting Guide

Cast a vision of care

It is great to start off the conversation by casting or revisiting your vision for care. Many churches we talk with want to be known for the way they love and care for people. Starting with your vision for care puts your team in the right posture for the following discussion.

Identify the process and the problem*

Church leaders and their teams continue to struggle when it comes to caring for and connecting with their people through life's high and low moments. As you know, people start to fall through the cracks when your team is not on the same page. Historically, the response to this problem has been the pastoral care spreadsheet. If that has been you, you know that solution isn't efficient or effective. If you don't have a spreadsheet, you might have been managing pastoral care through email threads, text messages or a dry-erase board. The point is, every church has a process to pastoral and congregational care – even if it is not formalized.

Before you pitch Notebird to your team it is important to frame the conversation by starting with these three questions:

- What methods are we currently using to track and organize care?
- What are the benefits of organizing care in these ways?
- What are the shortcomings and frustrations of our current process?

**You might be tempted to skip this step because you assume everyone knows the current process. While having this discussion, leaders often discover that not everyone on their team has a full understanding of their current care process. It is important for your team to feel the tension caused by your existing methods as you set the stage for a new solution.*

Introducing Notebird

We have provided a demo video for your team which highlights the features of Notebird. However, our vision is much bigger than building helpful software. It is truly to help you accomplish your vision to love and care for your people. We will be here every step of the way.

Meeting Outline

The main question we are aiming to answer today:

Do the tools and processes we use now put us in the best position to walk out our vision of care?

- **Start with your normal meeting ritual** (i.e. prayer, pastor jokes, etc.)
- **Reason for meeting**
- **Cast a vision of care** (Why is pastoral care important?)
- **Identify the process and the problem**
 - What are all the ways we are currently tracking and organizing care?
 - What are the benefits of organizing care this way?
 - What are the shortcomings and frustrations of our current process?
 - Do the tools and processes we use now put us in the position to walk out our vision of care?
- **Introduce Notebird**
 - Watch Notebird overview video
 - Work through questions (Write down questions you don't know how to answer. Our customer care team will be happy to answer them)
 - As a team, decide if Notebird is a tool your team would like to test out. (You can add your team members and have access to all features during your free trial)