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ONE LIFE CHURCH

CHURCH CHAMPIONS
ALIGNING PEOPLE, PROCESS & TECHNOLOGY

# PROMOTION - DEMOTION

## ONE LIFE CHURCH

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# OBJECTIVE

To define the procedures to detect and update people's profile based on their level of recent church engagement. Statuses are used to tag their current level of engagement with the church. If they become less engaged than their current level would indicate, they need to be demoted to a lower level status. If they become more engaged/active than their current level indicates, they need to be promoted to a higher status. The statuses used at the church and the rules that define promotion/demotion between them are documented in the **People Status Plan**.

Having people at the correct status level allows the church to target their communication and outreach to the group of people that should receive that message. It is the foundation of effective congregation segmentation.

# PROMOTIONS

This section defines all the procedures to promote people from a lower status to a higher, more engaged one. All the reports mentioned can be found using the *Church Champions* and *Promote* report tags.

## TO LEADER

When a person **leading** a Growth Group or Volunteer team, they should be promoted to *Leader*. In Fellowship One (F1) terms this means either they:

- Are marked as a Leader in an active Growth Group
- Have an active Volunteer/Staff assignment with a Staff Type of *Leader*

PROCEDURE
1. Run report *PROMOTE: to Leader – OLE* to produce a temporary group by that name.
   - ➢ Just click the **Run** button
2. Run report *PROMOTE: to Leader – OLH* to produce a temporary group by that name.
   - ➢ Just click the **Run** button

3. Run report ***PROMOTE: to Leader – OLW*** to produce a temporary group by that name.
   - ➢ Just click the **Run** button
4. Perform a mass action on the ***PROMOTE: to Leader – OLE*** temporary group:
   - a. Select the ***Change individual status*** option
   - b. Name the action ***To Leader – OLE***
   - c. Set the Status to ***Member – Leader***
   - d. Set the sub status to ***OLE***
   - e. Set the Status Date to today's date
5. Perform a mass action on the ***PROMOTE: to Leader – OLH*** temporary group:
   - a. Select the ***Change individual status*** option
   - b. Name the action ***To Leader – OLH***
   - c. Set the Status to ***Member – Leader***
   - d. Set the sub status to ***OLH***
   - e. Set the Status Date to today's date
6. Perform a mass action on the ***PROMOTE: to Leader – OLW*** temporary group:
   - a. Select the ***Change individual status*** option
   - b. Name the action ***To Leader – OLW***
   - c. Set the Status to ***Member – Leader***
   - d. Set the sub status to ***OLW***
   - e. Set the Status Date to today's date

## TO CONNECTED

When a person with an ***UnConnnected***, ***Attendee*** or ***Visitor*** status becomes a member of a Growth Group or Volunteer team, they should be moved to ***Connected*** and the status date updated.

PROCEDURE
1. Run report ***PROMOTE: to Connected – OLE*** to produce a temporary group by that name.
   - ➢ Just click the **Run** button
2. Run report ***PROMOTE: to Connected – OLH*** to produce a temporary group by that name.
   - ➢ Just click the **Run** button
3. Run report ***PROMOTE: to Connected – OLW*** to produce a temporary group by that name.
   - ➢ Just click the **Run** button
4. Perform a mass action on the ***PROMOTE: to Connected – OLE*** temporary group:
   - a. Select the ***Change individual status*** option
   - b. Name the action ***To Connected – OLE***
   - c. Set the Status to ***Member – Connected***
   - d. Set the sub status to ***OLE***
   - e. Set the Status Date to today's date
5. Perform a mass action on the ***PROMOTE: to Connected – OLH*** temporary group:
   - a. Select the ***Change individual status*** option
   - b. Name the action ***To Connected – OLH***
   - c. Set the Status to ***Member – Connected***
   - d. Set the sub status to ***OLH***
   - e. Set the Status Date to today's date
6. Perform a mass action on the ***PROMOTE: to Connected – OLW*** temporary group:
   - a. Select the ***Change individual status*** option
   - b. Name the action ***To Connected – OLW***

  c. Set the Status to **Member – Connected**
  d. Set the sub status to **OLW**
  e. Set the Status Date to today's date

## VISTOR TO UNCONNECTED

If after 60 days a visitor did not become a member of a Growth Group or Volunteer team, they should be moved to **UnConnected** and the status date updated.


PROCEDURE
1. Run report **PROMOTE: Visitor to UnConnected – OLE** to produce a temporary group by that name.
   ➢ Click the name of the report to open the report filters.
   ➢ Follow the <u>Before Running</u> **Notes** on the right side.
   ➢ Just click the **Run Report** button at the bottom of the report.
2. Run report **PROMOTE: Visitor to UnConnected – OLH** to produce a temporary group by that name.
   a. Click the name of the report to open the report filters.
   b. Follow the <u>Before Running</u> **Notes** on the right side.
   c. Just click the **Run Report** button at the bottom of the report.
3. Run report **PROMOTE: Visitor to UnConnected – OLW** to produce a temporary group by that name.
   a. Click the name of the report to open the report filters.
   b. Follow the <u>Before Running</u> **Notes** on the right side.
   c. Just click the **Run Report** button at the bottom of the report.
4. Perform a mass action on the **PROMOTE: Visitor to UnConnected – OLE** temporary group:
   a. Select the **Change individual status** option
   b. Name the action **Visitor to UnConnected – OLE**
   c. Set the Status to **Attendee – UnConnected**
   d. Set the sub status to **OLE**
   e. Set the Status Date to today's date
5. Perform a mass action on the **PROMOTE: Visitor to UnConnected – OLH** temporary group:
   a. Select the **Change individual status** option
   b. Name the action **Visitor to UnConnected – OLH**
   c. Set the Status to **Attendee – UnConnected**
   d. Set the sub status to **OLH**
   e. Set the Status Date to today's date
6. Perform a mass action on the **PROMOTE: Visitor to UnConnected – OLW** temporary group:
   a. Select the **Change individual status** option
   b. Name the action **Visitor to UnConnected – OLW**
   c. Set the Status to **Attendee – UnConnected**
   d. Set the sub status to **OLW**
   e. Set the Status Date to today's date


# DEMOTIONS

This section defines all of the procedures to demote people from a higher status to a lower, less engaged one. All the reports mentioned can be found using the **Church Champions** and **Demote** report tags.

## FIX MISSING CAMPUS STATUS

Before executing the demotion procedures below, we need to look for and fix any person with a Leader, Connected or UnConnected status that does not have a campus substatus. Without a campus substatus, they won't be properly detected when they need to be moved. The way to fix these people is to review their profile in F1, determine what their home campus should be and the add the correct substatus. The report below will find those people for you.

PROCEDURE
1. Run report ***DEMOTE: Add Campus Substatus*** to produce a temporary group by that name.
    - ➢ Just click the **Run** button
2. Review the F1 profile of each person in the report to determine the correct home campus
    - ➢ Look at activities attending by them and children
    - ➢ Look at the Groups they belong to
3. ***Edit*** the person and update the ***Sub status*** field to the correct value
    - ➢ OLH – Henderson
    - ➢ OLE – East Campus
    - ➢ OLW – West Campus

## LEADER TO (UN)CONNECTED

When a Leader is no longer leading a volunteer team or growth group, but has an active volunteer assignment or is a member of a growth group, they should be moved to ***Connected*** and the status date updated. If they do not have an active volunteer assignment and are not in a growth group at all, they should be moved to ***UnConnected*** and the status date updated.

### PROCEDURE
1. Run report ***DEMOTE: Leader - Active*** to produce a temporary group by that name
    - ➢ Just click the Run button

### LEADER TO CONNECTED
2. Run report ***DEMOTE: Leader to Connected  - OLE*** to produce a temporary group by that name.
    - ➢ Click the name of the report to open the report filters.
    - ➢ Follow the Before Running ***Notes*** on the right side.
    - ➢ Click the **Run Report** button at the bottom of the report.
3. Run report ***DEMOTE: Leader to Connected  - OLH*** to produce a temporary group by that name.
    - ➢ Click the name of the report to open the report filters.
    - ➢ Follow the Before Running ***Notes*** on the right side.
    - ➢ Click the **Run Report** button at the bottom of the report.
4. Run report ***DEMOTE: Leader to Connected  - OLW*** to produce a temporary group by that name.
    - ➢ Click the name of the report to open the report filters.
    - ➢ Follow the Before Running ***Notes*** on the right side.
    - ➢ Click the **Run Report** button at the bottom of the report.
5. Perform a mass action on the ***DEMOTE: Leader to Connected - OLE*** temporary group:
    - a. Select the ***Change individual status*** option
    - b. Name the action ***Leader to Connected – OLE***
    - c. Set the Status to ***Member - Connected***
    - d. Set the sub status to ***OLE***
    - e. Set the Status Date to today's date
6. Perform a mass action on the ***DEMOTE: Leader to Connected - OLH*** temporary group:
    - a. Select the ***Change individual status*** option

b.   Name the action *Leader to Connected – OLH*
c.   Set the Status to *Member - Connected*
d.   Set the sub status to *OLH*
e.   Set the Status Date to today's date
7.   Perform a mass action on the *DEMOTE: Leader to Connected - OLW* temporary group:
a.   Select the *Change individual status* option
b.   Name the action *Leader to Connected – OLW*
c.   Set the Status to *Member - Connected*
d.   Set the sub status to *OLW*
e.   Set the Status Date to today's date

LEADER TO UNCONNECTED

8.   Run report *DEMOTE: Leader to UnConnected - OLE* to produce a temporary group by that name
➢   Click the name of the report to open the report filters.
➢   Follow the <u>Before Running</u> *Notes* on the right side.
➢   Click the **Run Report** button at the bottom of the report.
9.   Run report *DEMOTE: Leader to UnConnected - OLH* to produce a temporary group by that name
➢   Click the name of the report to open the report filters.
➢   Follow the <u>Before Running</u> *Notes* on the right side.
➢   Click the **Run Report** button at the bottom of the report.
10.  Run report *DEMOTE: Leader to UnConnected - OLW* to produce a temporary group by that name
➢   Click the name of the report to open the report filters.
➢   Follow the <u>Before Running</u> *Notes* on the right side.
➢   Click the **Run Report** button at the bottom of the report.
11.  Perform a mass action on the *DEMOTE: Leader to UnConnected - OLE* temporary group:
a.   Select the *Change individual status* option
b.   Name the action *Leader to UnConnected – OLE*
c.   Set the Status to *Attendee - UnConnected*
d.   Set the Sub status to *OLE*
e.   Set the Status Date to today's date
12.  Perform a mass action on the *DEMOTE: Leader to UnConnected - OLH* temporary group:
a.   Select the *Change individual status* option
b.   Name the action *Leader to UnConnected – OLH*
c.   Set the Status to *Attendee - UnConnected*
d.   Set the Sub status to *OLH*
e.   Set the Status Date to today's date
13.  Perform a mass action on the *DEMOTE: Leader to UnConnected - OLW* temporary group:
a.   Select the *Change individual status* option
b.   Name the action *Leader to UnConnected – OLW*
c.   Set the Status to *Attendee - UnConnected*
d.   Set the Sub status to *OLW*
e.   Set the Status Date to today's date

## CONNECTED TO UNCONNECTED

When a *Connected* individual no longer has an active volunteer assignment and is not a member of a growth group, they should be moved to *Unconnected* and the status date updated.

PROCEDURE

1.   Run report *DEMOTE: Connected - Active* to produce a temporary group by that name.

- ➢ Just click the *Run* button
2. Run report ***DEMOTE: Connected to UnConnected – OLE*** to produce a temporary group by that name.
    - ➢ Click the name of the report to open the report filters.
    - ➢ Follow the <u>Before Running</u> ***Notes*** on the right side.
    - ➢ Click the **Run Report** button at the bottom of the report.
3. Run report ***DEMOTE: Connected to UnConnected – OLH*** to produce a temporary group by that name.
    - ➢ Click the name of the report to open the report filters.
    - ➢ Follow the <u>Before Running</u> ***Notes*** on the right side.
    - ➢ Click the **Run Report** button at the bottom of the report.
4. Run report ***DEMOTE: Connected to UnConnected – OLW*** to produce a temporary group by that name.
    - ➢ Click the name of the report to open the report filters.
    - ➢ Follow the <u>Before Running</u> ***Notes*** on the right side.
    - ➢ Click the **Run Report** button at the bottom of the report.
5. Perform a mass action on the ***DEMOTE: Connected to UnConnected - OLE*** temporary group:
    a. Select the ***Change individual status*** option
    b. Name the action ***Connected to UnConnected – OLE***
    c. Set the Status to ***Attendee - UnConnected***
    d. Set the Sub status to ***OLE***
    e. Set the Status Date to today's date
6. Perform a mass action on the ***DEMOTE: Connected to UnConnected - OLH*** temporary group:
    a. Select the ***Change individual status*** option
    b. Name the action ***Connected to UnConnected – OLH***
    c. Set the Status to ***Attendee - UnConnected***
    d. Set the Sub status to ***OLH***
    e. Set the Status Date to today's date
7. Perform a mass action on the ***DEMOTE: Connected to UnConnected - OLW*** temporary group:
    a. Select the ***Change individual status*** option
    b. Name the action ***Connected to UnConnected – OLW***
    c. Set the Status to ***Attendee - UnConnected***
    d. Set the Sub status to ***OLW***
    e. Set the Status Date to today's date


## UNCONNECTED TO ATTENDEE

When a person has been in ***UnConnected*** for 6 months without being promoted to ***Connected***, they should be demoted to ***Attendee*** and the status date updated.

PROCEDURE
1. Run report ***DEMOTE: UnConnected to Attendee – OLE*** to produce a temporary group by that name.
    - ➢ Just click the *Run* button
2. Run report ***DEMOTE: UnConnected to Attendee – OLH*** to produce a temporary group by that name.
    - ➢ Just click the *Run* button
3. Run report ***DEMOTE: UnConnected to Attendee – OLW*** to produce a temporary group by that name.
    - ➢ Just click the *Run* button

4. Perform a mass action on the *DEMOTE: UnConnected to Attendee - OLE* temporary group:
    a. Select the *Change individual status* option
    b. Name the action *UnConnected to Attendee – OLE*
    c. Set the Status to *Attendee - Attendee*
    d. Set the Sub status to *OLE*
    e. Set the Status Date to today's date
5. Perform a mass action on the *DEMOTE: UnConnected to Attendee - OLH* temporary group:
    a. Select the *Change individual status* option
    b. Name the action *UnConnected to Attendee – OLH*
    c. Set the Status to *Attendee - Attendee*
    d. Set the Sub status to *OLH*
    e. Set the Status Date to today's date
6. Perform a mass action on the *UnConnected to Attendee - OLW* temporary group:
    a. Select the *Change individual status* option
    b. Name the action *UnConnected to Attendee – OLW*
    c. Set the Status to *Attendee - Attendee*
    d. Set the Sub status to *OLW*
    e. Set the Status Date to today's date

## ATTENDEE TO DROPPED

When no one in a household consisting of only Attendees has not attended or given anything in the last 12 months, they should be moved to Dropped and the status date updated.

PROCEDURE
1. Run report *DEMOTE: Attendee to Dropped #1* to produce a temporary group by that name
    ➢ Just click the *Run* button
2. Run report *DEMOTE: Attendee to Dropped #2* to produce a temporary group by that name
    ➢ Click the name of the report to open the report filters.
    ➢ Follow the Before Running *Notes* on the right side.
    ➢ Click the **Run Report** button at the bottom of the report.
3. Run report *DEMOTE: Attendee to Dropped #3* to produce a temporary group by that name
    ➢ Select the *Temporary :: DEMOTE: Attendee to Dropped #1* option in the *Individual/Households in this group (X)* filter before running
    ➢ Select the *Temporary :: DEMOTE: Attendee to Dropped #2* option in the *Individual/Households in this group (Y)* filter before running
4. Run report *DEMOTE: Attendee to Dropped #4 - OLE* to produce a temporary group by that name
    ➢ Click the name of the report to open the report filters.
    ➢ Follow the Before Running *Notes* on the right side.
    ➢ Click the **Run Report** button at the bottom of the report.
5. Run report *DEMOTE: Attendee to Dropped #4 - OLH* to produce a temporary group by that name
    ➢ Click the name of the report to open the report filters.
    ➢ Follow the Before Running *Notes* on the right side.
    ➢ Click the **Run Report** button at the bottom of the report.
6. Run report *DEMOTE: Attendee to Dropped #4 - OLW* to produce a temporary group by that name
    ➢ Click the name of the report to open the report filters.
    ➢ Follow the Before Running *Notes* on the right side.
    ➢ Click the **Run Report** button at the bottom of the report.
7. Perform a mass action on the *DEMOTE: Attendee to Dropped #4 - OLE* temporary group:
    a. Select the *Change individual status* option

   b. Name the action ***Attendee to Dropped – OLE***
   c. Set the Status to ***Inactive – Dropped***
   d. Set the sub status to ***OLE***
   e. Set the Status Date to today's date

8. Perform a mass action on the ***DEMOTE: Attendee to Dropped #4 - OLH*** temporary group:
   a. Select the ***Change individual status*** option
   b. Name the action ***Attendee to Dropped – OLH***
   c. Set the Status to ***Inactive – Dropped***
   d. Set the sub status to ***OLH***
   e. Set the Status Date to today's date

9. Perform a mass action on the ***DEMOTE: Attendee to Dropped #4 - OLW*** temporary group:
   a. Select the ***Change individual status*** option
   b. Name the action ***Attendee to Dropped – OLW***
   c. Set the Status to ***Inactive – Dropped***
   d. Set the sub status to ***OLW***
   e. Set the Status Date to today's date