

# 7 Steps to Successfully Transition to Breeze's Built-in Giving Tools



**breeze**

# Table of Contents

- 3 Welcome to Breeze Giving
- 4 Set up your new giving platform
- 5 Choose a deadline
- 6 Plan your communication
- 7 Countdown to go live
- 8 Communicate, communicate, communicate!
- 9 Take care of recurring givers
- 10 Final call
- 11 Wrap up & resources

# Welcome to Breeze Giving

We're thrilled you're switching to Breeze's built-in online and text giving! Whether you made the decision to help your church save money, consolidate tools, increase generosity, or automate work, we can't wait for you to enjoy the benefits.

As you go through the process of transitioning, know that you're not alone. We have a lot of free resources peppered throughout this guide. Additionally, we offer [free one-on-one sessions](#), which you can schedule with our Online Giving Advocates.

Plus, **our team provides complimentary move-in services**. We will export existing giving records out of your current system and move them into your Breeze account. For security reasons, we aren't able to move sensitive information (such as credit card numbers) into your account. Please fill out this [move-in request](#) and we'll gladly answer your questions and help you plan accordingly.

And remember, because there's no extra cost to activate online and text giving, you can offer Breeze's giving tools alongside any existing ones and **gradually move your faithful givers over in a timeframe that works best for you** and them.

Now, let's dive into each step so you can get started.

# Setup

## Step 1: Set up your new giving platform



There are a few tasks you'll want to knock out right off the bat like moving in giving records, enabling transfers to your church's bank account, and customizing your giving page.



Here's a [checklist to help!](#)

Once you have Breeze's giving tools set up, we recommend you wait to cancel your current giving provider.

Depending on your church size and number of givers, it may take several weeks or months to gradually move everyone over and you'll want to ensure you've clearly communicated the changes first.

## Step 2: Choose a deadline

**Decide the exact date you're going to turn off your old platform.** This is the date you'll plan around and communicate with givers. Most churches find between 1-3 months allows plenty of time to transition everyone over smoothly.

When looking at the calendar, be mindful that you **choose a realistic timeframe.**

Factor in how many people you have helping with this project, how many recurring givers you'll need to transition, any vacations on the calendar that could result in your church being short-staffed, and note other events that may pull your attention away from the transition.



## Step 3: Plan your communication

Getting your ducks in a row before communicating will set you up for success. **This means knowing when and how you're going to communicate** and having the content thought out and ready to deliver.

Plan to share this information with your church in multiple places. Live announcements, social media posts, emails, posters hung in heavy foot traffic areas around the church, weekly bulletins, slides, and your website are all places people go to learn about ways to give.

**Start with an email informing donors why you're switching giving providers** (such as adding more giving options, creating an easier giving experience for your people, or saving money). You should also include instructions on how to set up a gift.

### Free Resources

Here's a great [example of an email announcing a giving provider transition](#) to help inspire you. You can also use this content to create a landing page on your website.

Use this [Communication Checklist](#) as a starting point to plan what and when you'll be communicating.

You can also utilize these [free customizable communication resources](#) to share your new ways to give.



## Step 4: Countdown to go live

You've already checked a lot of boxes off to launch your new giving platform. Now, it's time to take those last few steps so you can go live.

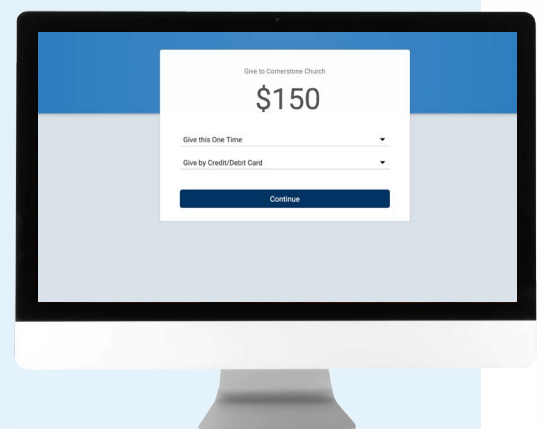
On the Sunday before removing your old giving options from your website, **announce that you're switching giving providers and replacing them with Breeze's built-in giving tools**. Let donors know they can expect to see some changes on your website and that you'll be sharing the new ways to give very soon.

**Reassure them that your old provider won't be turned off until the deadline.** That way, if they use the old provider because they aren't ready to switch or don't have time yet, they know their gifts will still reach the church.

Next, [share your giving page on your website](#). You don't have to remove the old provider's ways to give from your website yet, but this will allow you to ask a small group of staff, volunteers, and faithful givers to test the new ways to give.

Finally, **remove the old option from being available** and direct all donors to your new provider's online giving page and text number. Remember, don't turn off your old provider yet! You just want to remove it as the public-facing option.

### Share Your Breeze Giving Page on Your Website



## Step 5: Communicate, communicate, communicate!



By now, you've announced you're transitioning to a new giving platform, and you've replaced your old provider with Breeze. Fantastic! You're right on track to communicate to the fullest.

**Begin distributing all the content you created.** Double check that your new giving information has replaced the old way to donate in places like bulletins, posters, and social media.

**Announce live on Sunday that your new giving options are now available and share how to give.** Follow up with an email that includes your online

giving link and text giving number. Continue to remind your members weekly.

As you communicate, **share specific examples of how recurring and one-time gifts impact real lives** in your local community and around the world.

For instance, if your church volunteered to help with storm recovery, take pictures of the work you're doing and share that on social media, in emails, and in service. If you present slides during service, add these pictures to a slide and share during your offering moment.

**Let people know exactly what their gifts are supporting**, whether it's renting vans to get volunteers to the worksite, buying building supplies, or providing water and food stations for other organizations volunteering.

Be as specific as possible! **Here's an example of how Breeze shares the way [we give back](#).** A simple page on your website like this will help inform your recurring givers what your mission is and how each gift is making an impact.



## Step 6: Take care of recurring givers

Recurring givers are essential to your church's mission, and we know they're top of mind when transitioning giving providers.

Transitioning providers is actually a perfect time to celebrate the generosity of your recurring givers! In doing so, you can create the opportunity to increase giving to your church and inspire others to join them in their faithful generosity.

Take special care of your recurring givers by sending them an email sharing your appreciation, along with instructions on how to set up recurring gifts in the new giving platform and cancel gifts in the old platform.

After people begin moving their recurring gifts into your new platform, keep track of the movement and check that their recurring donation has been stopped in the old provider.

One week before canceling your old provider, personally call the individuals who have not yet switched over. During the call, thank them for their loyal support. Then, walk them through [setting up a recurring donation](#). You can also [view and modify recurring gifts](#) if needed.

### Breeze Pro Tip!

A simple way to track movement in Breeze is to add all recurring givers to a Tag and then remove them from the Tag once they've switched over. That way, you ensure any additional communication about moving to Breeze will not be sent to individuals who already transferred over.



## Step 7: Final call

The time has come to say goodbye to your old giving provider.

Over the past several weeks you've completed the steps above, communicated the new giving options, and all your recurring givers have moved over. Amazing job!

If you haven't reached out to our move-in team, do that before canceling your old provider to ensure your historic giving records are successfully moved into your Breeze account. Simply **fill out the [Move-in Request](#) and we'll promptly be in touch.**

If you have questions about setting up online and text giving, **schedule a [free one-on-one session](#) with an Online Giving Advocate.**



## Wrap Up & Resources

We're cheering you on as you help bring Christ's love to those in your local communities and around the world. The work you do is truly impactful, and our goal is to ensure you have the tools you need to help increase generosity and further your church's vision.

We know transitioning giving providers can feel daunting at first, but with a clear plan laid out, free resources, and a strong support team by your side, your church will enjoy the benefits of a new giving solution in no time. We hope these free resources help!

- [Communication checklist](#)
- [Example kickoff email for transitioning giving](#)
- [Online giving checklist](#)
- [Customizable communication material](#)
- [Sharing your online giving page](#)
- [Free one-on-one consultation with an Online Giving Advocate](#)
- [Recurring giving for donors](#)
- [View and modify recurring donations](#)
- [Getting started with tags](#)
- [Move-in request](#)