

STEP 1: VALUES & VISION

Adjusting Your View and Moving Ahead



The first step on your MARKETING PLAN

Now that Your Marketing Plan Team has:

- Read the **Introduction** and completed the:
 - **Congregational Demographic Report**
 - **Congregational Behavior and Response Report**
 - **Community Demographic and Behaviors Reports**
 - **Church Budget and Staffing Report**

It's time to take the first step to lay the foundation and set direction. This step will help your Marketing Team identify:

- Who your church is. (Values).
- Where your church is going. (Vision)

Step 1: Values & Vision

Homework

- **Homework 1: Values**
- **Homework 2: Vision**

Action Steps

- **Action Step 1: Values & Vision Retreat**

Marketing Plan Deliverables

- Core Values
- Demographics
- Vision Statement
- Key Messaging/Elevator Statement



HOMEWORK *(each Marketing Team member should complete before beginning Action Step)*



How long will it take?

One to 1.5 hours (longer if you choose to do further study).



What will I learn?

During **Action Step 1**, your team will participate in a retreat to help you identify your church's values and vision. This will lay the foundation and set the course for your **MARKETING PLAN**.

Reading through the **Homework** and reflecting on prepared reports will help you:

- Gain a better understanding of how values shape actions and decisions.
- Reflect on your personal values to help you hone in on the church values that attracted you and drew you to this congregation.
- Prepare for the team retreat by taking time to visualize the church's future. This prep time may come out of previous strategic planning that you and/or other church leaders have done in the past, or it may be borne out of the time you set aside to pray, reflect and dream about where God is taking your church.
- Understand the importance of vision clarity and unity before going into **Action Step 1**.



HOMWORK 1: VALUES

What are Values?

Core Values are your church's guiding principles that never change. They tell who you are as a church throughout the life of your church, no matter what your strategies, surroundings and circumstances are.

Core Values:

- **Reveal the historical and current *positive* elements of your church's personality.**
- **Tell your story.**
- **Identify what is unique about you** (e.g. generosity, serving church, mission and outreach, children/youth oriented.)
- **Discern what is important to you** – how you act instinctively and the intentional considerations you take into account when making a decision.

How does discovering your values impact your MARKETING PLAN?

They help you identify God's unique design for your church so you can understand what He has called you to do and the people He wants you to reach.

Example:

All churches are charged with the Great Commission to share the Good News of Jesus, but a church that values strong families may use marriage development tools such as counseling services and support groups as methods for sharing that Good News.

They help you find your unique niche to better meet the needs in your community.

Example:

A church that values generosity may position themselves as a group that commits itself to community services and development.

They help focus your messages around key strengths.

Example:

A church that values the next generation may develop strategies that express the church's desire to invest in youth and guide them up to be people of character.

They help you stay grounded in what stays the same no matter what marketing strategies you develop.

Example:

A church that values Bible-based teaching will not use a marketing strategy that focuses on a secular self-help book.



CAUTION!

- Core Values are something you discover not create. They are already intrinsic to the congregation. You need to uncover what they are so you can 1) develop marketing messages and strategies that align with the uniqueness of the congregation and 2) be aware of potential competing values that could hinder or delay progress toward your vision.

Example:

Our church values the large senior citizen population in our congregation and surrounding community; and has a strong desire to invest in their lives and guide them to continue to be people of character in the latter part of their years. We support the local UMC assisted-living facility in financial, spiritual and tactical ways. This ongoing friendship/partnership means that we highly value our senior citizens and do all that we can to actively include them in our congregational worship, activities and community outreach.

Later in the Marketing Plan process, you will have the opportunity to also "discover" how the community views you and your values. Comparing the two will be a valuable learning experience for your church; helping you identify how you can better display those values to the people you want to reach.

- Core Values are not beliefs. Beliefs are theology; values are personality.
- Beware of aspired values! Throughout this process, focus on your church's true self – who you are, not a desired self – what you would like to be or think you should be based on other churches' identities.
- The church values many things, but for this process, we focus on CORE values - the four or five key factors that drive your actions and decisions over all the others.
- Discovering your church's Core Values is a collective process. Don't let personal values impede coming to a shared agreement.

Read/Respond/Reflect

Read the following story and answer the questions.

On a cold fall morning when I was in the eighth grade, the doorbell to our nice suburban home rang. I opened the door and saw a boy my age looking at me. His clothes were a size too small.

Behind him I could see a rusted pick-up truck pouring exhaust smoke onto our street. Parents and kids packed the front seat; firewood overflowed from the truck bed. "Do you need any firewood?" the boy asked my dad? "Sure" my dad replied.

As the boy ran back to the truck to help unload firewood, Dad turned to me and told me to go get my winter coat. Assuming he wanted me to help stack wood, I put on the coat and ran back to help dad. (It was a great coat, by the way, a 1970's "Snorkle" coat with tight-closing hooded rim trimmed in fake fur.)

When I returned, Dad said, "Take off your coat and let's give it to that boy. His is too small for him."

Without fanfare, Dad handed the boy's father the coat as he paid for the wood. He said, "Here, my son has outgrown this. Perhaps your son would like it." (I don't think I had outgrown it, but it was a gracious way to help the wood-seller hold onto his pride.)

Fast forward thirty-something years to today. I was exiting the highway on a bitterly cold winter day. I came to a stop and saw a homeless man my age looking at me. His uncovered hands shivered as they clutched a sign asking for assistance. Instinctively I rolled down my window, reached into the passenger seat, grabbed my gloves and handed them to the man.

The years change. The settings change. But the value is constant.

From this story, what values were core to the way this family acted and made decisions?

What values were instilled into you as a child that still hold true today? How were those values demonstrated in your family's actions and decisions?

To help you start to see the values of your church, reflect on the following questions about your church.

What attracted you/your family to this church?

Why did you/your family continue to connect with the church and become a leader within it?

What role do you/your family play in the church?

Was there a time when you were not involved with a church? If so, what prevented you from connecting with a church? What made you finally connect?

As you review your answers above, what patterns or ideas do you see that suggest what your church's Core Values are?

Review/Reflect

Review the **Congregational Demographic Report** and the **Congregational Behavior/Response Report**. Note observations and potential conclusions about the congregation and what is important to them.



What types of programs/initiatives are people responding to the most?

What programs/initiatives are not getting a good response?

What assumptions can we make based on the demographics?

Example:

If there are a high number of families with elementary kids, an assumption is that the church has something positive to offer elementary kids.

Note below any other thoughts or observations about values:



HOMWORK 2: VISION

What is Vision?

Vision sets your church on a course toward a desired destination. It takes who you are (values) and points that uniqueness toward what you can accomplish.

Vision:

- **Paints a picture.** People see where you're going so they can determine if they want to go there with you.
- **Focuses you.** It narrows down what you say "yes" to and what you say "no" to so you mobilize all your energy and resources in the same direction.
- **Shared by leaders.** Most pastors have a personal vision for their church, but they cannot make that vision a reality without unifying with staff and laity so everyone is pulling and pushing in the same direction.
- **Builds momentum.** As a leader, you see where you are going so clearly that your passion about it is contagious and others feel compelled to come along.

How does knowing and understanding your church's vision impact your **MARKETING PLAN**?

It points you in the direction where your **MARKETING PLAN will take you.**

Your vision will help you decide what marketing strategies and tactics will steer you in the direction you want to go, propelling you farther along in that direction.

Example 1:

A church's vision statement: To "transform spiritually distracted families in our local community to know and love God."

Their marketing strategy targets busy soccer moms driving kids around town. Their tactics include a) radio spots before and after school, b) a summer arts camp for kids, and c) showcasing their café's free wireless so dad can work while waiting for son to play basketball.

Example 2:

A church's vision statement: To "find and accept the diversity among God's creation and show everyone how to love God and love others."

Their marketing strategy targets minorities who are seeking a church to belong to. Their tactics include a) a free ESL program for the minority community, b) bi-lingual flyers posted at local ethnic grocery stores/restaurants, visually illustrating the church's openness to diversity, and c) hosting a yearly ethnic festival at the church and encouraging the minority community to participate and attend.

Creates the messages around which you will center your **MARKETING PLAN**

Your **MARKETING PLAN** needs to center around key messages ... words and concepts that communicate with the people you want to reach and inspire to respond. Knowing your vision lays the foundation for those key messages.

Example:

The church mentioned above in Example 1 might use the following as their key messaging (Elevator Statement). Note the use of the vision statement to communicate where they're going.

"Our community is filled with families that are spiritually distracted. They are driven to succeed, to find happiness, to live lives of fulfillment and purpose. But the things that drive them actually distract them ... away from God and the life of fulfillment and purpose that only He can offer."

"There are families at ABC United Methodist Church who are driven toward spiritual fulfillment. They have found true happiness, friendships, fulfillment and purpose as the church has helped 'transform them into knowing and loving God."

"ABC United Methodist Church and the individuals who comprise it want to reach and transform spiritually distracted families in our local community so they come to know and love God. We do this by:

- *Welcoming people into an inspiring and intimate worship experience.*
- *Offering relevant studies and spiritual formation opportunities to help them become followers of Christ.*
- *Serving to make a difference and benefit our community and world.*



STOP!

Core Values? Vision? These words are *so* confusing!

You're right! Companies and churches use words like, values, vision, mission, strategy, and guiding principles, all the time and they mean different things in different environments. For the development of your **MARKETING PLAN**, we're only focusing on Core Values and Vision; let's use them in this way:

Core Values: Who You Are *at the Core*

Your church's foundational principles that rarely change. They tell YOU who you are throughout the life of your church, no matter what your strategies, surroundings and circumstances are.

Vision: Your *Outward* Destination

Sets your church on a course toward a desired destination (that may or may not be tangible). It takes what God has uniquely created your church to be (values) and points you toward what He designed you to accomplish.

Your **MARKETING PLAN** is one of many components that move you toward your vision. Other components that support your vision and move you toward it:

- Organizational Structure
- Staffing
- Resource allocation
- Decision making

Read/Respond/Reflect

Prepare through prayer. You might consider reading through Nehemiah chapters 1 and 2 to learn about God's vision for his people.

Here's a story about a person who lost focus on their vision. Read the following story and answer the questions below.

I was on my way to an important company meeting in another city. Having never traveled to this city, I entered the address into my GPS and carefully planned my departure time to allow for an early arrival to make a good impression.

As I got closer to the city, I realized I should have eaten something. I recalled that a friend had told me about a great restaurant nearby where I could get "the best milkshake on the planet." I reset my GPS to find the restaurant and headed in that direction.

As I headed toward the milkshake, I realized I was actually too tight on time and couldn't make it to the restaurant and still be at the meeting on time.

Now, feeling a little anxious about being late, I turned back to my GPS. Having headed off track and now anxious, I looked at my GPS and thought, "It says I'm supposed to go north, but I'm certain that the meeting location is south." I had taken my eyes off my original destination, and with thoughts of milkshakes and meetings swirling in my head, I decided not to trust my GPS.

Ten minutes later, my anxiety grew to panic as I realized looking at the clock, my meeting was started and I was not there yet. And, now finding a trustworthy landmark, I realized I had just driven 10 miles in the wrong direction.

Now 30 minutes late, I enter a full room of people already engaged in work. While I hoped to enter invisibly, the facilitator turned to me and said, "Nice that you could join us."

From this story, why was it important to keep vision in front of you?

Do you recall a time when you have tangibly or intangibly lost your vision? What opportunities did you miss?

Draw/Reflect

The Vision that Brought Us Here:

In the space below, draw a picture or describe what your church looked like 5 years ago (or less, depending on when you first connected with the church). Consider:

- What type of people made up the church?
- What type of people was the church reaching out to and connecting with/serving?
- What was the main thing the church was known for?
- What did people talk about?
- What activities/initiatives thrived? What activities/initiatives were dying?
- What was your favorite thing about the church?
- What was your least favorite thing about the church?

Now turn back to your **Homework 1: Values** and consider the questions above in today's context. Describe or draw a picture of what the church looks like today.



If you know what the church's vision was five years ago, write it below. If you don't know what it was, write a vision statement that you believe could have been in place that led to the church being what it is today.

Now think ahead to five years from now. Looking at the church from your situation and from that of the people in your family and your community, draw a picture or describe what your desire would be for the church to look like. Consider:

- What type of people make up the church?
- What type of people is the church reaching out to and connecting with/serving?
- What is the main thing the church is known for?
- What are people talking about?
- What activities/initiatives thrive? What activities/initiatives die?
- What will be your favorite thing about the church?
- What will be your least favorite thing about the church?



Now write a potential vision statement that would focus the church toward what you described above.

Read/Reflect/Respond

Your **MARKETING PLAN** has the most potential for success if church leaders clearly communicate (through words and decisions) priorities that are within the church's Values and Vision. Then resources need to be released and redirected toward emphasizing those priorities.

Read the example below of what happens when vision is not clear or unified, then answer the reflection questions.

Example:

A pastor has a heart for outreach and a vision for seeing his congregation inviting co-workers and neighbors to a special Christmas program.

The event arrives. It's done well – excellent execution, relevant message, beautiful music, poignant testimonies, and the potential of personal application for people dealing with any life situation. But, the room was full of people who already called that church their home. No guests attended.

What happened?

- **Resources were directed in ways out of alignment with a vision for outreach.**
The church's staff and lay leaders focused their time, energy and budgets on the preparation of the event itself.
- **Messages competed for attention.** All the communication tools (Sunday announcements, bulletin, web site, e-news) asked people to volunteer, donate supplies, attend the event, etc. Any messages encouraging people to invite others were buried or suffocated by all the other "asks."
- **Outreach was an after-thought.**
If the idea of inviting a friend was discussed, it was something ministries and members did *in addition* to other priorities as opposed to it being core to who they are.

From this story, what are ways the pastor could have clarified the vision so it became a priority?

Based on how you described the church looking in five years, what is taking place right now that could make it a priority? What could compete with it being a priority?



STOP!

Having a clear Vision is crucial to implementing your MARKETING PLAN

The exercises in this section are designed to help leaders:

- Clarify your church vision (so everyone understands where you are heading); and
- Unify fellow leaders around the vision (so everyone is heading in the same direction.)

Throughout this step of your **MARKETING PLAN** process, you will see STOP signs signaling you to stop and evaluate if your team has **vision clarity and unity**.

If at any point you find:

- **Your vision is foggy** – you can't clearly see the specific direction where God wants your church to focus; or
- **Your leaders are not in agreement** – the lead pastor sees the church heading in one direction while other leaders are focusing on another direction,

Then stop! Take time away from your **MARKETING PLAN** process to work toward clarity and unity. It will add more time to the process, but Your Plan will be so much stronger and exciting in the long run.



ACTION STEP 1: VALUES & VISION RETREAT



Who?

Marketing Plan Team members will participate in a Values & Vision Retreat.



How long will it take?

Planning: Two to three weeks.

Retreat: Three to four hours.



Why?

- Celebrating and reflecting on history and current successes helps us hone in on what is important to our church.
- Discovery of values needs to be a collective process. Bringing many leaders together will help us identify the four to five values that are CORE to who we are.
- To bring leaders together for vision clarity and unity.



What will I Accomplish?

- Through the process of celebrating and discussing church moments, people, actions and decisions, the team will uncover values that are core to the church.
- The team will reflect on where the church has been and in what direction it is heading so they can clarify and unify around the church's vision.

Preparation

The Marketing Plan Coordinator will plan the agenda and coordinate logistical details. Everyone will come to the retreat having worked through their **Homework 1: Values** and **Homework 2: Vision**, which will help stimulate their thinking and prepare them for each of the retreat's components.

Process

- **Open in prayer (5 min.):** Pray for clarity and unity around your church's values and vision.
- **Focus the team (10 min.):** On how you got to this meeting (your **MARKETING PLAN** process), and the opportunity you have today. Review key points from **Homework 1: Values** and **Homework 2: Vision**. If participants have significant questions /concerns/comments from the homework, make note of those on a flip chart, but don't take the time to address and answer all of those at this time. As the retreat draws to a close, revisit the list to see if those questions/concerns/comments have been addressed.
- **Values (90 to 120 min.):**
(If your team is more than 10 people, break the group down into smaller groups of 5 to 8.)

Facilitator asks each group to take one hour to discuss the following. (Don't write anything down yet.)

- What is your most meaningful memory of the church?
- What positive stories have become "larger than life" at this church?
- What other symbols (facilities, property, regular events, rituals, etc.) have particular meaning to our people?
- What are the things that are drawing new people to the church?
- What decisions (especially difficult ones) has the church made that were particularly good decisions in recent years?

Facilitator asks each group to spend 20 minutes discussing the following. He/she provides examples of other church's Core Values (see resources).
(The group will write these take-aways on posters to share with the larger group.):

- Based on the previous discussions, what are the most predominant themes that emerged?
- Narrow that list down to four or five key themes.
- Write those themes as Core Values.

Facilitator brings the larger group together to report on their values. Facilitator then works to find consensus among the group to prepare four to five Core Value statements. *(This will become **Step 1: Values & Vision Deliverable.**)*



Step 1: Deliverable

Write the following into your master **MARKETING PLAN** Worksheet

_____ church's **Core Values** are:

- _____
- _____
- _____
- _____
- _____

Facilitator then asks the groups to take 20 minutes to discuss the church's demographics based on values and demographics/behaviors reflections. The group will write four to five key demographic traits of the congregation based on this discussion. *(The group writes these on posters to share with the larger group.)*

Facilitator brings the larger group together to report on their demographic findings. Facilitator then works to find consensus among the group to prepare four to five key demographic traits. (This will become this section's deliverable.)

Portions of this exercise come from TAG Consulting and the book "Transforming Church" by Kevin Ford. Used with permission.



Step 1: Deliverable

Write the following into your master **MARKETING PLAN** Worksheet

Demographics: The people of _____ church are:

- _____
- _____
- _____
- _____
- _____

▪ **Vision (60 to 90 min.):**

Facilitator asks each group to take one hour to discuss the following. (Don't write anything down yet.)

- **What two or three key things do you want your church to be known for?** (E.g. a safe and relevant place to explore faith, many activities for kids to be challenged and grow, extreme generosity to the poorest nations.)
- **If your church closed its doors, what would your community miss the most?** (E.g., biblical teaching, counseling, basketball program.)
- Share the picture or description you prepared of what the church would look like in five years (from Vision homework).
- Take some time to compare perspectives and discuss the common ideas that surfaced.
- Select one picture/description or draw/write a new one that most closely reflects the consensus among the group.

Facilitator brings the larger group together to report on their vision concepts. He or she asks the collective group to work toward consensus on identifying the shared concepts and focal points, challenging them to hone in as specifically as possible.



STOP!

Are you unified? Working toward consensus takes time. However, if the leaders are discovering roadblocks during this step, go back to the STOP for resources on how to clarify and unify.

Facilitator then asks each group to spend 20 minutes drafting a church vision statement based on the shared concepts and focal points (or discuss how the church's current vision statement supports these concepts).

Facilitator brings the larger group together to share their statements. Facilitator then works to find consensus among the group to prepare the church's vision statement. *(This will become this section's deliverable.)*



Step 1: Deliverable

Write the following into your master **MARKETING PLAN** Worksheet

_____ church's **Vision Statement** is:

▪ **Key Messaging/Elevator Statement (30 to 45 min.):**

Facilitator asks each group to spend 20 minutes creating a Key Messaging/Elevator Statement. Drawing from the deliverables on your **MARKETING PLAN** so far:

- Core Values
- A description of the people in your church
- Vision Statement

Develop a description of your church in the time it takes to ride an elevator down from the 20th floor (no longer than 60-90 seconds). (Write description on large paper to share with the group.) If you and your team are unfamiliar with the Elevator Statement concept, an internet search on "Elevator Statement" will provide dozens of resources and examples.

Facilitator brings the larger group together to share their statements. Facilitator then works to find consensus among the group to prepare the church's Key Messaging/Elevator Statement. (This will become this section's deliverable.)



STOP!

Is it clear? Having this many people developing a single message takes time. However, if the leaders are discovering roadblocks during this step, go back to the STOP for resources on how to clarify and unify.



Step 1: Deliverable

Write the following into your master **MARKETING PLAN** Worksheet

Key Messaging/Elevator Statement Deliverable

Write the following into your **MARKETING PLAN**

_____ church's **Key Messaging/Elevator Statement** is:

This is the end of **Action Step 1: Values & Vision Retreat**. You may want to revisit the list of questions/concerns/comments that participants may have had at the beginning of the retreat to see if they have been addressed. In the coming days, direct your team to begin work on **Step Two: Perception & Needs**.

Additional Reading & Resources

- [Church Vitality Indicator](#)
- [TAG's Transforming Church Resources](#)

Recommended books for Marketing Plan Team to read:

- *The Big Idea*, by Dave Ferguson, Eric Bramlett and Jon Ferguson
- *Breakout Churches*, by Thom Rainer
- *Simple Church*, by Thom Rainer
- *Transforming Church*, by Kevin Ford