

Streamlining Project Management and Communication for Sugar Creek Baptist Church with monday.com



ORGANIZATION

A non-profit, Sugar Creek Baptist Church (SCBC) is guided by the mission, "To Love and Lead All People To Life Change in Christ." SCBC handled all marketing in-house across two campuses, with four major annual events, multiple quarterly events, and specialty program initiatives.

CHALLENGE

SCBC sought to optimize administrative tasks and project coordination within its Communications department. The client already possessed an existing monday.com account but required external expertise for rapid board set-up and immediate functional results.

The primary challenge was the need for rapid set-up to yield Phase One results for the communications team and their internal customers. The system needed to address key organizational failures in the communication request process:

- Marketing requests were frequently submitted without sufficient information.
- Marketing requests were often submitted too late for timely completion.
- There was a critical lack of visibility and reporting across projects.

The XTIVIA Solution: Multi-Phase Implementation

XTIVIA utilized its standard engagement process, comprising Discovery, Strategy, Implementation, and Evaluation, to ensure a successful deployment. The goal of the implementation was to achieve ease of use and efficient management of project information.

Phase 1 Deliverables

The initial scope concentrated on establishing the foundational workflow:

- **Board Builds:** New boards were created, with an initial focus on a central Requests Board populated from the existing requests form.
- **Workflow Implementation:** A delivery model workflow was developed in accordance with the Communications team's guidelines, incorporating automations, integrations, notifications, and dependencies.
- **Integrations:** Teams integration and notifications were established.
- **Digital Asset Management (DAM):** Work began on establishing a DAM system within monday.com, integrating with Dropbox.
- **User Adoption:** Best-practice documentation and onboarding resources were shared.

Phase 2 Deliverables

The second phase focused on optimization, detailed reporting, and specialization across the organization:

- **Form Updates:** Implementation of Form 2.0 updates to the previous request form aimed at radical simplification. (Both forms and logic built by XTIVIA.)
- **Ministry Specialization:** Specific ministry boards and ministry reporting dashboard updates were created to improve workflow from Communications to individual departments.
- **Automations:** Additional automations were developed to improve the overall workflow.
- **Project Packaging:** Communication service packages (Levels 1, 2, and 3) were developed. These packages detailed required media deliverables (e.g., social media, video, graphics, web) for different event types.
- **Planning Process:** A five-stage planning process was integrated: Discover, Design, Organize, Execute, and Finish, providing clear gates and milestones for level events.

BUSINESS RESULT

The collaboration provided the Communications department with a robust project management system, enabling efficiency and clarity.

- **Operational Clarity:** The implementation helped streamline input and provided a visual representation of project information to internal clients.
- **Organizational Shift:** The successful implementation supported the shift of the Communications department to operate as an internal "agency," supported by assigned account managers.
- **Adoption Support:** XTIVIA provided leadership and guidance to the organization for rolling out the new system, including strategies to facilitate staff adoption and implementation.
- **Sustained Partnership:** *The client expressed gratitude for the commitment and attention provided by XTIVIA* and reaffirmed their commitment to continuing the relationship.

ABOUT XTIVIA

For over 30 years, XTIVIA has been a leading B2B technology solutions provider, empowering clients to competitively leverage their chosen technology. We offer extensive services, including database, analytics, AI, security, application development, and managed services. Partnering with industry leaders, our skilled, certified professionals deliver customized solutions that drive measurable results. www.xtivia.com