

Cast a vision of care

Begin by grounding your team in the bigger picture—why your church values and prioritizes care. Many churches aspire to be known for the way they love and support their people, but sustaining that vision requires clarity and alignment. Revisiting your care vision not only reinforces your mission but also prepares your team to engage in a meaningful discussion about how to make it a reality. When everyone is on the same page, your care efforts become more intentional, impactful, and sustainable.

Identify the process and the problem*

Care teams often struggle to provide consistent pastoral care, especially when life's high and low moments come quickly. When your team isn't aligned, people inevitably fall through the cracks. Traditionally, churches have relied on spreadsheets, sticky notes, scattered email threads, text messages, or even dry-erase boards to manage care—systems that quickly become overwhelming and ineffective. CareNote offers a better way, bringing structure, automation, and real-time collaboration to your pastoral care ministry, so no need goes unnoticed.

Before you pitch CareNote 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?

**It may be tempting to assume that everyone on your team fully understands the current care process, but that's rarely the case. In these discussions, leaders are often surprised to learn that different team members have varying perspectives—or even different methods—for tracking and managing care. Taking time to examine your existing approach helps your team recognize its limitations and feel the challenges firsthand. This shared awareness creates the right tension, making it easier to introduce a new and better solution.*

Introducing CareNote – A Complete Pastoral Care System

CareNote is the only pastoral care platform designed to simplify and enhance the way churches care for their congregants. With intelligent automation, real-time insights, and seamless integrations, CareNote helps pastors and care teams stay organized while reducing administrative burdens. Our volunteer-friendly pricing ensures that entire teams can participate without financial strain, making professional-level pastoral care accessible to any church. Whether you're managing care requests, tracking milestones, or ensuring no one is overlooked, **CareNote transforms compassion into action**—so you can focus on what truly matters.

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

1. Start with your normal meeting ritual (i.e. prayer, check-in, silence, etc.)
2. Reason for meeting
3. Cast a vision of care
 - (Why is pastoral care important?)
4. 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?
5. Introduce CareNote
 - Watch CareNote overview video
 - Work through questions (Write down questions you don't know how to answer. CareNote is ready to answer all of your questions.)
6. Encourage the team to review CareNote's guides for launching a care ministry or the ultimate guide to pastoral care
 - Review the CareNote [Launching a Care Ministry Guide](#) or the [Ultimate Guide to Pastoral Care](#) to determine what insights might be helpful for your church's ministry launch.
7. As a team, decide if CareNote 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.)